This training curriculum was prepared by Caitlin Allen and Paige Menking, CGA Consulting, for the KC Regional Community Health Worker Collaborative sponsored by the Mid-America Regional Council (MARC). The new curriculum and supporting documents were made possible through a grant from the Health Forward Foundation and are available for public use. MARC asks that any use of the material acknowledges the source of the information.

The Missouri Department of Health and Senior Services and community colleges throughout the state of Missouri assisted in the preparation of these materials.

Special thanks to the Kansas Community Health Worker Consortium’s Education Committee.

Please note: This curriculum and associated materials are being piloted and tested and are subject to change. Please check the website at marc.org/chw-prof-dev for updates.
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Introduction to Core Competency Curriculum

This curriculum was developed to train community health workers (CHWs) working in the state of Kansas. CHWs are defined as:

Community health workers are frontline public health workers who are trusted members of and/or have a close understanding of the communities 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. A CHW 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.

<table>
<thead>
<tr>
<th>Kansas Core Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Self-awareness</strong></td>
</tr>
<tr>
<td>• Awareness of own emotional and behavioral responses.</td>
</tr>
<tr>
<td>• Recognition and ability to explain how an individual's culture, beliefs or values affect behavior.</td>
</tr>
<tr>
<td><strong>Service Coordination and System Navigation</strong></td>
</tr>
<tr>
<td>• Assist health care providers to coordinate care.</td>
</tr>
<tr>
<td>• Help clients understand and use health and community-based services appropriately.</td>
</tr>
<tr>
<td>• Bridge cultural, linguistic, knowledge and literacy differences among individuals, families, communities and providers.</td>
</tr>
<tr>
<td><strong>Educating to Promote Healthy Behavior Change</strong></td>
</tr>
<tr>
<td>• Provide people with information, tools and encouragement to help them improve their health and stay healthy.</td>
</tr>
<tr>
<td><strong>Advocacy</strong></td>
</tr>
<tr>
<td>• Working with or on behalf of people or communities to exercise their rights and gain access to resources.</td>
</tr>
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<td><strong>Individual and Community Capacity Building</strong></td>
</tr>
<tr>
<td>• Helping people or communities develop the confidence and ability to make decisions and seek resources that affect their health.</td>
</tr>
<tr>
<td>• Promoting individual and collective empowerment through education, skill development, networking, organizing and strategic partnerships.</td>
</tr>
<tr>
<td><strong>Effective Communication Strategies</strong></td>
</tr>
<tr>
<td>• Listening carefully and communicating respectfully in ways that are meaningful to the individual.</td>
</tr>
<tr>
<td>• Includes listening, speaking, gathering and sharing information, resolving conflict and checking for understanding.</td>
</tr>
<tr>
<td><strong>Cultural Responsiveness</strong></td>
</tr>
<tr>
<td>• Understand beliefs, values, customs and social behavior shared by a group of people with common identity.</td>
</tr>
<tr>
<td>• Act as cultural mediators between health and human service systems.</td>
</tr>
<tr>
<td><strong>Documentation and Reporting</strong></td>
</tr>
<tr>
<td>• Document work activities, including writing summaries of individual and community assessments accurately.</td>
</tr>
<tr>
<td>• Able to present information to colleagues or organizational partners while maintaining confidentiality.</td>
</tr>
<tr>
<td><strong>Professionalism and Conduct</strong></td>
</tr>
<tr>
<td>• Skills to handle ethical challenges, confidentiality and privacy rights.</td>
</tr>
<tr>
<td>• Professional boundaries and working collaboratively in an organization.</td>
</tr>
</tbody>
</table>

Any videos referenced in the curriculum can be found here: https://www.youtube.com/channel/UCKSB1-LQsSfsRp24Q9W2Jlw.

This curriculum integrates classroom and Service Learning to help ensure CHWs are able to gain the practical skills needed to be successful in their roles. Below are a list of the 12 competencies and expected number of in-class and Service Learning hours required to be considered competent in the role.

<table>
<thead>
<tr>
<th>#</th>
<th>Competency</th>
<th>In Class hours</th>
<th>Service Learning hours</th>
<th>Total hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Self-awareness</td>
<td>17.5</td>
<td>5</td>
<td>22.5</td>
</tr>
<tr>
<td>2</td>
<td>Service Coordination and System Navigation</td>
<td>7.75</td>
<td>5</td>
<td>12.75</td>
</tr>
<tr>
<td>3</td>
<td>Educating to Promote Healthy Behavior Change, Resource Knowledge</td>
<td>8</td>
<td>5</td>
<td>13</td>
</tr>
<tr>
<td>4</td>
<td>Advocacy</td>
<td>8.25</td>
<td>5</td>
<td>13.25</td>
</tr>
<tr>
<td>5</td>
<td>Individual and Community Capacity Building</td>
<td>4</td>
<td>7</td>
<td>11</td>
</tr>
<tr>
<td>6</td>
<td>Effective Communication Strategies</td>
<td>8.5</td>
<td>3</td>
<td>11.5</td>
</tr>
<tr>
<td>7</td>
<td>Cultural Responsiveness</td>
<td>11</td>
<td>3</td>
<td>14</td>
</tr>
<tr>
<td>8</td>
<td>Documentation and Reporting</td>
<td>5.5</td>
<td>9</td>
<td>14.5</td>
</tr>
<tr>
<td>9</td>
<td>Professionalism and Conduct</td>
<td>8</td>
<td>3</td>
<td>11</td>
</tr>
<tr>
<td>10</td>
<td>Use of Public Health/Community Health Concepts and Approaches</td>
<td>7.5</td>
<td>5</td>
<td>12.5</td>
</tr>
<tr>
<td>11</td>
<td>Individual Assessment</td>
<td>8</td>
<td>5</td>
<td>13</td>
</tr>
<tr>
<td>12</td>
<td>Community Assessment, Identify Barriers and Resources</td>
<td>6</td>
<td>5</td>
<td>11</td>
</tr>
</tbody>
</table>

**In-class total: 100**

**Service-learning total: 60**

**Total: 160**
## Timing Options

The 12 competencies add up to a total of 100 hours of classroom time, though each module is not the same duration. Below are two options for structuring your sessions, based on four-hour or eight-hour classroom sessions.

### Twenty-five x 4-hour sessions

<table>
<thead>
<tr>
<th>Day 1</th>
<th>Day 2</th>
<th>Day 3</th>
<th>Day 4</th>
<th>Day 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Self-Awareness – 17.5 hours</td>
<td></td>
<td></td>
<td></td>
<td>2. Service Coordination and System Navigation – 7.75 hours</td>
</tr>
<tr>
<td>Day 6</td>
<td>Day 7</td>
<td>Day 8</td>
<td>Day 9</td>
<td>Day 10</td>
</tr>
<tr>
<td>Day 11</td>
<td>Day 12</td>
<td>Day 13</td>
<td>Day 14</td>
<td>Day 15</td>
</tr>
<tr>
<td>5. Individual and Community Capacity Building – 4 hours</td>
<td>6. Effective Communication Strategies – 8.5 hours</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day 16</td>
<td>Day 17</td>
<td>Day 18</td>
<td>Day 19</td>
<td>Day 20</td>
</tr>
<tr>
<td>Day 21</td>
<td>Day 22</td>
<td>Day 23</td>
<td>Day 24</td>
<td>Day 25</td>
</tr>
</tbody>
</table>
# Kansas CHW Core Competency Curriculum

## Thirteen x 8-hour sessions (The last session is four hours + overflow room.)

<table>
<thead>
<tr>
<th>Day 1</th>
<th>Day 2</th>
<th>Day 3</th>
<th>Day 4</th>
<th>Day 5</th>
</tr>
</thead>
</table>
| 1. Self-Awareness  
– 17.5 hours | | 2. Service Coordination and System Navigation  
– 7.75 hours | 3. Educating to Promote Behavior Change  
– 8 hours | 4. Advocacy  
– 8.5 hours |

<table>
<thead>
<tr>
<th>Day 6</th>
<th>Day 7</th>
<th>Day 8</th>
<th>Day 9</th>
<th>Day 10</th>
</tr>
</thead>
</table>
| 5. Individual and Community Capacity Building  
– 4 hours | | 6. Effective Communication Strategies  
– 8.5 hours | 7. Cultural Responsiveness  
– 11 hours | 8. Documentation and Reporting  
– 5.5 hours |

<table>
<thead>
<tr>
<th>Day 11</th>
<th>Day 12</th>
<th>Day 13</th>
</tr>
</thead>
</table>
| 11. Individual Assessment  
– 8 hours | 12. Community Assessment  
– 6 hours | Overflow time |
Structure

This curriculum is based on Kansas’ 12 core competencies for community health workers. Each module covers one competency and includes lecture and activities from the relevant corresponding chapters in the “Foundations” textbook. For most modules, the training instructions can be used to guide classroom lectures and activities alongside the textbook, with or without the use of the accompanying PowerPoint presentation. We encourage you to incorporate flipcharts and/or white boards into the classroom instead of the PowerPoint.

Be sure to read carefully through the entire training guide, as well as the corresponding textbook chapters and activities, before each class session.

Each set of training instructions includes:

- Session outline.
- Trainer and learner preparation.
- Service-learning instructions.
- Materials needed.
- Learning objectives.
- Step-by-step guide to structuring the class session, organized by chapter.

Assessing CHW Competencies

Competencies are assessed in both classroom and Service Learning settings. Detailed information about assessments are included at the end of each chapter. An overview is included below:

<table>
<thead>
<tr>
<th>#</th>
<th>Competency</th>
<th>In Class</th>
<th>Service Learning</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Self-awareness</td>
<td>Textbook assessment 6.1 or 7.2</td>
<td>Shadow reflection</td>
</tr>
<tr>
<td>2</td>
<td>Service Coordination and System Navigation</td>
<td>Textbook assessment 10.1, 10.2, 10.3, 16.2 or 16.3</td>
<td>Development of systems navigation map</td>
</tr>
<tr>
<td>3</td>
<td>Educating to Promote Healthy Behavior Change, Resource Knowledge</td>
<td>Textbook assessment 20.1</td>
<td>Health promotion reflection</td>
</tr>
<tr>
<td>4</td>
<td>Advocacy</td>
<td>Assessment 15.1 or 23.1</td>
<td>Advocacy resource table Participatory action</td>
</tr>
<tr>
<td>5</td>
<td>Individual and Community Capacity Building</td>
<td>Assessment 19.2 or 21.1</td>
<td>Written reflection</td>
</tr>
<tr>
<td>6</td>
<td>Effective Communication Strategies</td>
<td>Assessment 13.1 or 13.2</td>
<td>Completion of discussion with a service-learning supervisor</td>
</tr>
<tr>
<td>7</td>
<td>Cultural Responsiveness</td>
<td>Assessment 6.1 and 17.1</td>
<td>Brief presentation about cultural responsiveness</td>
</tr>
<tr>
<td>8</td>
<td>Documentation and Reporting</td>
<td>Assessment 8.3</td>
<td>Completion of five cases during Service Learning</td>
</tr>
<tr>
<td>9</td>
<td>Professionalism and Conduct</td>
<td>Assessment 22.2</td>
<td>Completion of research table</td>
</tr>
<tr>
<td>10</td>
<td>Use of Public Health/Community Health Concepts and Approaches</td>
<td>Assessment 14.2</td>
<td>Reflection paper</td>
</tr>
<tr>
<td>11</td>
<td>Individual Assessment</td>
<td>Assessment 4.1</td>
<td>Completion of two goal planning worksheets</td>
</tr>
<tr>
<td>12</td>
<td>Community Assessment, Identify Barriers and Resources</td>
<td>Assessment 8.2 or 9.1</td>
<td>Completion of two written reflections</td>
</tr>
</tbody>
</table>
Further Training Resources

Please see the Overview section of the Foundations Training Guide for more information about using their activities and evaluations. The Overview section also includes valuable resources on pedagogy, adult education, training styles, and modeling professional behavior. **We strongly encourage you to read this entire section before beginning your first CHW training session.**

Service Learning Resources

Additional information about Service Learning is available in the Service Learning Resources and Handbook for students. Each chapter in this curriculum guidebook references elements of the Service Learning handbook.
# Course Evaluation

Throughout the course, trainers are encouraged to informally evaluate the course with students and make adjustments as needed. At the beginning of the course, each student should fill out the below pre-course evaluation. At the end of the course, each student should fill out the end-of-course evaluation.

## Pre-course Evaluation

Please rank each on a scale of 1–5 with 1 being Strongly Disagree and 5 being Strongly Agree.

### I feel prepared for my role as a CHW.

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Disagree</td>
<td>Disagree</td>
<td>Neutral/Undecided</td>
<td>Agree</td>
<td>Strongly Agree</td>
</tr>
</tbody>
</table>

### I feel I have competence in each of the following areas:

#### Self-awareness
- Awareness of one’s own emotional and behavioral responses.
- Recognition and ability to explain how an individual’s culture, beliefs or values affect behavior.

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<tr>
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<td>Disagree</td>
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</table>

#### Service Coordination and System Navigation
- Assist health care providers to coordinate care.
- Help clients understand and use health and community-based services appropriately.
- Bridge cultural, linguistic, knowledge and literacy differences among individuals, families, communities and providers.

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<td>Neutral/Undecided</td>
<td>Agree</td>
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#### Educating to promote healthy behavior change, resource knowledge
- Provide people with information, tools and encouragement to help them improve their health and stay healthy.

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#### Advocacy
- Working with or on behalf of people or communities to exercise their rights and gain access to resources.

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<td>Neutral/Undecided</td>
<td>Agree</td>
<td>Strongly Agree</td>
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#### Individual and Community Capacity Building
- Helping people or communities develop the confidence and ability to make decisions and seek resources that affect their health.
- Promoting individual and collective empowerment through education, skill development, networking, organizing and strategic partnerships.

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Effective Communication Strategies
- Listening carefully and communicating respectfully in ways that are meaningful to the individual.
- Includes listening, speaking, gathering and sharing information, resolving conflict and checking for understanding.

<table>
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<tr>
<th>Strongly Disagree</th>
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<td>5</td>
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Cultural Responsiveness
- Understand beliefs, values, customs and social behavior shared by a group of people with common identity.
- Act as cultural mediators between health and human service systems.

<table>
<thead>
<tr>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neutral/Undecided</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
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<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

Documentation and Reporting
- Document your work activities, including writing summaries of individual and community assessments accurately.
- Present information to colleagues or organizational partners while maintaining confidentiality.

<table>
<thead>
<tr>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neutral/Undecided</th>
<th>Agree</th>
<th>Strongly Agree</th>
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</thead>
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<td>5</td>
</tr>
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</table>

Use of Public Health/Community Health Concepts and Approaches
- Identify health disparities related to social justice issues.
- Identify evidence-based methods and promote those that prevent injury and disease.
- Promote health equity and efforts to reduce health disparities through engagement with others.
- Engage in systematic problem solving — including assessment, information gathering, goal setting, planning, implementation, evaluation and documentation.

<table>
<thead>
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<th>Agree</th>
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<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

Individual Assessment
- Assess barriers to accessing health care and other services.
- Help people to identify their goals, barriers to change and supports for change.
- Continue assessment as an on-going process.

<table>
<thead>
<tr>
<th>Strongly Disagree</th>
<th>Disagree</th>
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<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
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</table>

Community Assessment, Identify Barriers and Resources
- Identify barriers to accessing health care within a community.
- Share results with partners to develop outreach plans

<table>
<thead>
<tr>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neutral/Undecided</th>
<th>Agree</th>
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<td>2</td>
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<td>5</td>
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</table>

Professionalism and Conduct
- Skills to handle ethical challenges, confidentiality and privacy rights.
- Professional boundaries and working collaboratively in an organization.

<table>
<thead>
<tr>
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<td>5</td>
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</tbody>
</table>
End-of-course Evaluation

Please rank each on a scale of 1–5 with 1 being Strongly Disagree and 5 being Strongly Agree.

<table>
<thead>
<tr>
<th>I feel prepared for my role as a CHW.</th>
</tr>
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<tbody>
<tr>
<td>1 Strongly Disagree</td>
</tr>
<tr>
<td>2 Disagree</td>
</tr>
<tr>
<td>3 Neutral/Undecided</td>
</tr>
<tr>
<td>4 Agree</td>
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<td>5 Strongly Agree</td>
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<tr>
<td>4 Agree</td>
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<td>5 Strongly Agree</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Service Coordination and System Navigation</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Assist health care providers to coordinate care.</td>
</tr>
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<tr>
<th>Educating to promote healthy behavior change, resource knowledge</th>
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### Cultural Responsiveness
- Understand beliefs, values, customs and social behavior shared by a group of people with common identity.
- Act as cultural mediators between health and human service systems.

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### Documentation and Reporting
- Document your work activities, including writing summaries of individual and community assessments accurately.
- Present information to colleagues or organizational partners while maintaining confidentiality.

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### Use of Public Health/Community Health Concepts and Approaches
- Identify health disparities related to social justice issues.
- Identify evidence-based methods and promote those that prevent injury and disease.
- Promote health equity and efforts to reduce health disparities through engagement with others.
- Engage in systematic problem solving — including assessment, information gathering, goal setting, planning, implementation, evaluation and documentation.

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### Individual Assessment
- Assess barriers to accessing health care and other services.
- Help people to identify their goals, barriers to change and supports for change.
- Continue assessment as an on-going process.

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<tr>
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</table>

### Community Assessment, Identify Barriers and Resources
- Identify barriers to accessing health care within a community.
- Share results with partners to develop outreach plans.

<table>
<thead>
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### Professionalism and Conduct
- Skills to handle ethical challenges, confidentiality and privacy rights.
- Professional boundaries and working collaboratively in an organization.

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</table>
**Instructor Evaluation**

Please rank each on a scale of 1–5 with 1 being Strongly Disagree and 5 being Strongly Agree.

<table>
<thead>
<tr>
<th>The presenter integrated active learning opportunities for relevant practice.</th>
<th>1</th>
<th>2</th>
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<tr>
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<td>Neutral/Undecided</td>
<td>Agree</td>
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<tr>
<td>There was a logical flow of topics.</td>
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<tr>
<td>Strongly Disagree</td>
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<td>Neutral/Undecided</td>
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<tr>
<td>The presentation was well-paced with appropriate time for questions.</td>
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<tr>
<td>Strongly Disagree</td>
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<td>Neutral/Undecided</td>
<td>Agree</td>
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<tr>
<td>The presenter's delivery was effective.</td>
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<tr>
<td>Strongly Disagree</td>
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<td>Agree</td>
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<tr>
<td>The presenter clearly presented explanations of important concepts.</td>
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<tr>
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<td>Agree</td>
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<tr>
<td>Materials included important content and elements of interest.</td>
<td>1</td>
<td>2</td>
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<tr>
<td>Strongly Disagree</td>
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<td>Materials included relevant examples.</td>
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<td>Strongly Disagree</td>
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<tr>
<td>Materials were useful for future reference.</td>
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<tr>
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<td>The presenter checked for understanding while speaking.</td>
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<tr>
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<tr>
<td>The presenter was respectful of students.</td>
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<td>Strongly Disagree</td>
<td>Disagree</td>
<td>Neutral/Undecided</td>
<td>Agree</td>
<td>Strongly Agree</td>
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<tr>
<td>I learned a great deal in this class period.</td>
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<td>2</td>
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<tr>
<td>Strongly Disagree</td>
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<td>Neutral/Undecided</td>
<td>Agree</td>
<td>Strongly Agree</td>
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<tr>
<td>The content challenged and stimulated my thinking.</td>
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<tr>
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</tbody>
</table>
1. Do you feel prepared for CHW work upon completion of this course? Why or why not?

2. What did you find most valuable about the course?

3. What suggestions do you have for improving the presentation of the materials?

4. Do you have any additional comments?
Module 1: Self-Awareness

Outline

Who are Community Health Workers?
  Welcome
  Lecture: Overview of CHW Roles
  Group Activity 1.1 and 1.2
  CHW Panel (Activity 1.3)
Cultural Humility
  Group Activity 6.1
  Lecture: Cultural Humility
  Video Activity 6.2
  Role Play Activity 5.3
  Anti-racism Presentation
Self-Awareness, Conflict and Boundaries
  Lecture: Self-Awareness, Conflict and Boundaries
  Reflective Writing Activity 7.5
Review and Assessment

Trainer Preparation:

- Invite CHW presenters for the CHW Panel (Activity 1.3).
- Invite a presenter to do and anti-racism training.
- Read Chapter 1, Chapter 6, Chapter 7.3, Chapter 13.5, Chapter 21.9.
- Read through instructions and handouts for in-class activities.
- Test classroom A/V system for the videos in Activity 6.2.
- Prepare materials needed for activities.

Learner Preparation:

- Read Chapter 1, Chapter 6, Chapter 7.3, Chapter 13.5, Chapter 21.9.
- Complete the Conflict Style self-assessments on p. 354-355 and be prepared to discuss in class.

Timing (Total — 19 hours, 30 minutes):

- Lecture — 2 hours, 45 minutes.
- Activities — 11 hours, 45 minutes.
- Other — 1 hour, 15 minutes.
- Breaks — 1 hour, 15 minutes (break times are not written in, use your discretion).
- Service learning that involves shadowing a CHW to observe self-awareness — 2 hours.

Materials:

- Name tags or table tents (suggested for at least the first few sessions).
- Copies of handouts and materials for:
  - Activity 1.1
    - Flipchart.
    - Pens, colored markers or crayons.
    - Copies of “Learner Handout 1.1 A: CHW Body Template.”
    - Tape or thumbtacks.
    - Copies of “Learner Handout 1.1 B: CHW Self-Assessment.”
    - Optional: “Learner Handout 1.1 C: CHW roles and Core Competencies Tables.”
  - Activity 1.2
    - Flipchart and markers.
    - Writing paper and pens.
  - Activity 1.3
    - Nametags and pens.
• Activity 6.1
  • Flipchart.
  • Paper.
  • Colored pencils or markers.
• Activity 6.2
  • Computer and projector.
  • Internet access to view online videos.
• Activity 6.3
  • Flipchart and markers.
  • Writing paper and pens.
  • Copies of “Learner Handout 6.3 A: Small Group Discussion Questions.”
• Activity 7.5
  • Copies of “Learner Handout 7.5 A: Self-Awareness Reflective Writing.”
  • Optional: Copies of Assessment 6.1 or Assessment 7.2.

Learning Objectives:
After this session, participants will be able to:

• Chapter 1:
  • Describe CHWs and what they do.
  • Identify where CHWs work, the populations they work with and the health issues they address.
  • Explain the core roles that CHWs play in the health and social service fields.
  • Discuss the core competencies that CHWs use to assist individuals and communities.
  • Describe personal qualities and attributes that are common among successful CHWs.
  • Discuss emerging models of care and opportunities for CHWs.
• Chapter 6:
  • Define the concept of cultural humility.
  • Describe the changing population in the United States and how this affects the work of CHWs.
  • Discuss how historical and institutional discrimination affects the health of targeted communities and influences their work with public health providers.
  • Analyze the importance of becoming lifelong learners and practitioners of cultural humility.
  • Discuss and analyze concepts of traditional health beliefs and practices, and how they may influence the delivery of services to clients.
  • Identity, analyze and apply models for practicing cultural humility and conducting client-centered interviews regarding health issues, including the Tool to Elicit Health Beliefs and the LEARN Model.
  • Create a personal learning plan in order to become a culturally effective CHW.
• Chapter 7:
  • Define self-awareness.
  • Explain the importance of self-awareness to the work of CHWs.
  • Identify practical strategies for enhancing self-awareness.
• Chapter 13:
  • Discuss the importance of understanding personal and cultural conflict styles and become more familiar with your own conflict style.
• Chapter 21:
  • Discuss the importance of self-reflection and evaluation to becoming a skilled group facilitator and apply this to your work.
Who are Community Health Workers?  
6 hours

Learning Objectives:

- Describe CHWs and what they do.
- Identify where CHWs work, the populations they work with and the health issues they address.
- Explain the core roles that CHWs play in the health and social service fields.
- Discuss the core competencies that CHWs use to assist individuals and communities.
- Describe personal qualities and attributes that are common among successful CHWs.
- Discuss emerging models of care and attributes for CHWs.

Welcome (60 minutes)
Start the class by introducing yourself and having participants introduce themselves. Answer questions such as, “What is your experience with CHWs?” and “What do you want from this class?”

Then transition into an icebreaker game. Building class cohesion and community is key to a productive learning environment, therefore it is key to start building trust immediately. Suggested games include Icebreaker Bingo, Speed Meeting and Group Mapping. You can find great options on the internet or substitute your own favorite “get-to-know-you” game.

Intentions (15 minutes)
Quickly review the learning objectives and outline the agenda for this module. Spend 10–12 minutes as a group discussing and outlining expectations for a productive classroom and a safe space for what can be difficult and controversial topics. Consider making a list of classroom norms and bringing it with you to each class session.

Lecture (1 hour, 15 minutes)
Overview of CHW Roles — Spend one hour and 15 minutes lecturing on the role of a CHW, covered in Chapter 1 of the textbook. You may also use the corresponding Module 1 PowerPoint to guide the lecture. Begin by asking students what they already know about the role of CHWs and go on to cover the main themes of Chapter 1, including:

- Common titles for CHWs (p. 5).
- CHW Statistics (p. 6–7).
- Models of Care (p. 8).
- Core Roles (p. 13–15).
- Core Competencies (p. 6).
- Qualities and Attributes of CHWs (p. 17–18).
- The Role of CHWs in the Management of Chronic Conditions (p. 18–20).
- Professionalizing the CHW Field (p. 21).

Words to Know

- Advocate: (verb) to actively speak up and support a client, community or policy change; (noun) someone who speaks up for a cause or policy or on someone else’s behalf.
- Capitation: when a health care organization receives a set amount of funding to serve each patient, instead of reimbursement for each appointment, test or treatment provided.
- Credentialing: certification from an educational institution, professional association or employer that allows you to work in a certain field.
- Health inequalities: differences in the rates of illness, disability and death among different communities, in particular those differences that are preventable, unfair and unjust.
- Social justice: equal access to essential health resources such as housing, food, education, employment, health care and civil rights.
Group Activity (2 hours minutes)
Lead the class in both between Activity 1.1: Roles, Competencies and Characteristics of CHWs; and Activity 1.2: Identifying Characteristics of Successful CHWs. Activity 1.1 includes individual work “drawing” a CHW followed by a self-assessment and group discussion, while Activity 1.2 is a written self-reflection with large group discussion.

Guest Presenters (90 minutes)
Organize a CHW Panel based on the guidelines provided in Activity 1.3: CHW Panel — Experts in the Field. Introducing students to individuals already working as CHWs will help them conceptualize the CHW role and start to build their professional network. This activity is found in multiple modules throughout this training, so consider grouping the CHWs you invite by topic (such as type of health issue they work on, predominant role they perform, communities they work with, etc.).
<table>
<thead>
<tr>
<th>Kansas Core Competencies</th>
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<tbody>
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<tr>
<td>• Awareness of own emotional and behavioral responses.</td>
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<tr>
<td>• Recognition and ability to explain how an individual's culture, beliefs or values affect behavior.</td>
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<tr>
<td>Service Coordination and System Navigation</td>
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<tr>
<td>• Assist health care providers to coordinate care.</td>
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Cultural Humility

While cultural humility is the focus of this chapter, it is a concept that underlies every part of a CHW’s role. CHWs often work with their own communities, but even within these contexts they can work with clients from a variety of cultural backgrounds and with diverse life experiences. It is vital for CHWs to examine cultural contexts outside of their own and to approach differences with humility and understanding. This chapter will begin to introduce skills for dialoguing around race, culture, privilege and bias — but the conversations should continue throughout the course.

Learning Objectives:

- Define the concept of cultural humility.
- Describe the changing population in the United States and how this affects the work of CHWs.
- Discuss how historical and institutional discrimination affects the health of targeted communities and influences their work with public health providers.
- Analyze the importance of becoming lifelong learners and practitioners of cultural humility.
- Discuss and analyze concepts of traditional health beliefs and practices and how they may influence the delivery of services to clients.
- Create a personal learning plan in order to become a culturally effective CHW.

Words to Know

- **Gender identity**: someone’s own sense of being female or male, both or neither, and what that means to him, her or them.
- **Heterogeneity**: diversity within a culturally defined community.
- **Structural racism and discrimination**: inequities are built into the key systems of a society, such as the education, legal, employment, housing and health care system.
- **Definition of Culture** (p. 140).
- **Building Cultural Self-Awareness and Capacity** (p. 144–147).
- **Culture and Health Beliefs** (p. 147–150).

Group Activity (90 minutes)
Guide students through Activity 6.1: Introduction to Cultural Humility. The activity involves individual, small and large group reflection as a way to introduce the topics of identity, bias and power.

Lecture: Cultural Humility (30 minutes)
Spend 30 minutes lecturing on the elements of cultural humility not covered by Activity 6.1. You may choose to use the Module 1 PowerPoint as a resource. Make sure to touch on and reinforce the following themes:

- Definition of Cultural Humility (p. 137).
- Requirements for Practicing Cultural Humility (p. 138–139).
- Structural Racism and Discrimination in Public Health (p. 140–142).
- Building Cultural Self-Awareness and Capacity (p. 144–147).
- Culture and Health Beliefs (p. 147–150).

Video Activity (45 minutes)
Use Activity 6.2: Cultural Humility Video Discussion to review and emphasize cultural humility concepts. The activity will involve watching videos and then analyzing them as a group.

Role Play Activity (60 minutes)
Activity 6.3 will allow participants to practice the concepts they have learned in the previous activities by roleplaying. They will work through their own experiences with their small groups before reporting out on the process.
Anti-racism Presentation (4 hours)
An understanding of structural inequities and systemic racism is key to CHW work. It is critical that CHWs approach their work with an anti-racist lens and there are great organizations doing the work of anti-racist training. Connect with a local trainer or entity that specializes in diversity, inclusion and anti-racism and invite them to present to the class. Depending on timing, this presentation/activity can be moved to accommodate the presenter’s schedule.

Self-Awareness, Conflict and Boundaries 2 hours

Learning Objectives:

- Define self-awareness.
- Explain the importance of self-awareness to the work of CHWs.
- Identify practical strategies for enhancing self-awareness.
- Discuss the importance of understanding personal and cultural conflict styles and become more familiar with your own conflict style.
- Discuss the importance of self-reflection and evaluation to becoming a skilled group facilitator and apply this to your work.

Words to Know

- **Self-disclosure**: when a CHW or other helping professional shares personal information about themselves with clients.
- **Professional boundaries**: the limitations or ethical guidelines that define professional working relationships.
- **Self-awareness**: an ongoing process of identifying and working to better understand yourself, including your life experiences, values and beliefs, and prejudices.

Lecture: Self-Awareness, Conflict and Boundaries (60 minutes)
Spend 60 minutes lecturing on the elements of cultural humility not covered by Activity 6.1 and introducing the topics of Self-Awareness and Conflict, covered in Chapters 7, 13, and 21. Make sure to touch on the following themes:

- The Value of Self-Awareness (p. 171–172).
- Personal Conflict Styles (p. 353–355).
- Discuss Conflict Style activity on p. 354–355.
- Self-Awareness and Boundaries (p. 617–618).

Reflective Writing Activity (60 minutes)
Lead students in Activity 7.5: Building Self-Awareness. The activity begins with a written self-reflection and culminates in a group report-back session.
Review and Assessment  

**Reinforcing Concepts** (30 minutes)

Take half an hour to ask students questions from the day’s session. Possible review structures include: informally asking questions and waiting for students to raise their hands, forming a group competition, asking for written answers or asking students to ask each other questions.

**Assessment** (Optional)

Give students Assessment 6.1: Cultural Humility Personal Plan or Assessment 7.2: Self-Awareness Reflective Writing. You may assign these assessments as take-home projects or you can use the class time allotted for group review.

Service Learning  

This Service Learning activity will enhance skills learned in this module.

Learners will shadow a CHW at their placement site, either during individual client interactions or while facilitating a group session. They will then write a reflection on the experience.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Service Learning activity</th>
<th>Hours</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-awareness</td>
<td>• Shadow CHW and observe their interactions with clients OR&lt;br&gt;• Shadow a group session and observe CHW interactions with clients.</td>
<td>2</td>
<td>• Shadow reflection</td>
</tr>
</tbody>
</table>

**Service Learning Activities:**

*Shadow CHW and client (or group) interaction:*

- Set up a time to shadow a CHW in your organization or worksite placement.
- Ensure that the CHW’s client is comfortable with you shadowing the interaction.
- During the shadowing, take notes to help in writing your reflection later.
- After your experience, take a few minutes to debrief with the CHW you shadowed. Take time to learn more about the experience and discuss their perceptions of their interaction with the client.
- Reflect on the experience by writing your answers to the questions in the following section.

**Assessment — Shadow Reflection:**

- Think about your shadowing experience and how it relates to the competency of “self-awareness.” Write a brief (one page) reflection about your experience and discuss the ways that you were self-aware during the shadowing experience, ways that the CHW you were following was self-aware and opportunities to improve self-awareness in the future.
Module 2: Service Coordination and System Navigation

Outline
Background on the Health Care System
- Review
- Lecture: U.S. Health Care System
- Group Activity 5.1 or 5.2
Care Management
- Lecture: Overview of Care Management
- Group Activity
Chronic Disease Management
- Lecture: Chronic Disease Management
- Group Activity
Review and Assessment

Trainer Preparation:
- Read Chapter 10, Chapter 16 and Chapter 5.2.
- Read through possible in-class activities and choose which are most helpful to your learners.
- Prepare materials needed for activities.

Learner Preparation:
- Read Chapter 10, Chapter 16 and Chapter 5.2.
- Complete any assigned assessments from previous module.
- Complete any assigned Service Learning activities.

Timing (Total — 12 hours):
- Lecture — 2 hours, 30 minutes.
- Activities — 3 hours, 45 minutes.
- Other — 50 minutes.
- Breaks — 40 minutes (break times are not written in, use your discretion).
- Service Learning — 6 hours.

Materials:
- Name tags or table tents (suggested for at least the first few sessions).
- Copies of handouts and materials for chosen activities. This module has room for variation in activities and assessments so refer to each activity for the materials and handouts needed.

Learning Objectives:
After this session, participants will be able to:

Chapter 5:
- Explain how health care services are financed or paid for in the United States.
- Describe who provides health care services in the United States.
- Identify health care programs, insurance coverage and other resources that serve low-income clients.
- Describe the remaining gaps in the coverage and care delivery systems and who is left out.

Chapter 10:
- Define care management.
- Explain their scope of practice as a care manager.
- Understand the differences and similarities between working with an individual versus working with families as their client.
- Analyze and examine concepts of gender identity and working with transgender and gender nonconforming communities.
- Work with clients from a strength-based perspective to identify both strengths and needs.
• Support clients to develop a detailed care management plan designed to promote their health and well-being.
• Identify and provide meaningful referrals to community resources.
• Organize their work and manage their files.
• Clearly document the care management services they provide.
• Chapter 16:
  • Identify some of the most common chronic diseases in the United States and discuss health inequalities in rates of chronic disease among populations.
  • Apply the ecological model to analyze the causes and consequences of chronic conditions.
  • Analyze and discuss the limitations of traditional medical models for the treatment of chronic conditions, and ways to integrate medical and public health approaches.
  • Discuss team-based approaches to the delivery of primary health care, and the role and scope of practice of CHWs within these teams.
  • Analyze and explain the concept of patient empowerment and the self-management of chronic conditions.
  • Discuss the application of client-centered concepts and skills to supporting patients in learning how to effectively manage their own chronic conditions.

**Background on the U.S. Health Care System**

2 hours, 45 minutes

**Learning Objectives:**

• Explain how health care services are financed or paid for in the United States.
• Describe who provides health care services in the United States.
• Identify health care programs, insurance coverage and other resources that serve low-income clients.
• Describe the remaining gaps in the coverage and care delivery systems and who is left out.

**Words to Know**

• **Advance premium tax credits**: federal money that can be used right away to subsidize, or offset, the cost of premiums for health plans purchased through marketplace.
• **Affordable Care Act (ACA)**: a law passed in 2010 that expands health insurance coverage by encouraging most employers to offer coverage, by expanding government programs, and by creating a “marketplace” to shop for comprehensive insurance.
• **Children’s Health Insurance Program (CHIP)**: Federal- and state-funded coverage administered by the states that typically covers children under 200% FPL.
• **Copayment**: a share of costs for receiving services at a clinic or hospital or for medications.
• **Deductible**: The fixed initial amount paid by a consumer before their insurance company pays the rest.
- **Federal poverty level (FPL)**: a dollar amount that determines what it means to live in, or at levels near, poverty.

- **Health insurance marketplace**: established by the ACA to help individuals and small businesses buy more affordable health insurance.

- **Individual mandate**: the requirement under the ACA that requires all individuals to have health insurance.

- **Medicaid**: federally funded and state administered health coverage for more than 60 million low-income individuals and families.

- **Medicare**: federally funded and administered program that provides universal medical care for the elderly.

- **Premiums**: the set, usually monthly, payment made by a consumer to an insurance company for coverage.

- **Safety net**: the parts of the system that provide care to people without insurance or who are having difficulty finding an accessible practitioner.

- **Small Business Health Options Program (SHOP)**: an online marketplace that helps small businesses provide health coverage to their employees.

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**Review** (15 minutes)

Start the class by reviewing what was covered in the last class session. Ask for definitions of key vocabulary or concepts and see if anyone had new thoughts over the last week or made any new connections to the material.

**Intentions** (5 minutes)

Quickly review the learning objectives and outline the agenda for this module. Remind the class of the classroom norms they outlined together and ask if anyone has any additions to the list.

**Lecture: U.S. Health Care System** (40 minutes)

Go over sections 5.2 and 5.3 in Chapter 5 as an introduction to how public insurance programs work and how clients access care. It is possible to get very detailed with this topic; for the sake of this module, stay at a birds-eye view of vocabulary rather than getting into specifics of programs and eligibility. Encourage them to discuss this topic in more detail with those they meet through their Service Learning and/or employment. Make sure to touch on:

- How We Pay for Health Care
- Employer-Based Health Insurance (p. 116).
- Government Programs
- Medicare (p. 117).
- Medicaid (p. 118).
- CHIP (p. 118).
- Health Insurance Marketplace (p. 119).
- Federal Poverty Level (p. 119).
- Who Provides Health Care Services (p. 120-124).

**Group Activity** (1 hour, 45 minutes)

Choose between Activity 5.1: “Poverty” and Public Assistance Program Eligibility and Activity 5.2: Shopping Online for Health Insurance Coverage. Activity 5.2 requires computer and internet access, so you could also make it a take-home activity.
Care Management  
2 hours

Learning Objectives:

- Define care management.
- Explain their scope of practice as a care manager.
- Understand the differences and similarities between working with an individual versus working with families as their client.
- Analyze and examine concepts of gender identity and working with transgender and gender nonconforming communities.
- Work with clients from a strength-based perspective to identify both strengths and needs.
- Support clients to develop a detailed care management plan designed to promote their health and well-being.
- Identify and provide meaningful referrals to community resources.
- Organize their work and manage their files.
- Clearly document the care management services they provide.

Words to Know

- Care management: assisting consumers and their support system to become engaged in a collaborative process designed to manage medical/social/mental health conditions more effectively.
- Homeostasis: balance within the family system.

Lecture: Overview of Care Management  
(50 minutes)

Note: If learners closely read Chapter 10 before class, you may opt to substitute the lecture for Learning Activity 10.1

Care Management is a fundamental element of the CHW field, so be sure to spend adequate time making sure that learners understand the following concepts:

- Defining Care Management (p. 262).
- Basic Concepts of Care Management (p. 244).
- Developing the Care Management Plan (p. 267).
- Assessments (p. 269–271).
- Goals and Priorities (p. 271–272).
- Action Plan (p. 273).
- Ending Services (p. 281).
- Helpful Suggestions for Care Management (p. 282).
- Client Advocacy (p. 283).
- Potential Challenges (p. 284).
- Working with Families (p. 286).
- Identifying Resources and Providing Referrals (p. 288).
- Organization and Documentation (p. 292).
- Case Conferences (p. 295).

Group Activities (70 minutes)

Choose one or two of the group activities from Chapter 10, depending on the needs of the students in the classroom and the amount of time left in the session. We suggest doing one discussion or video-based activity (10.2, 10.4, or 10.8) and one role-play (10.3, 10.5, or 10.9). Activity 10.7: An Introduction to Working with Families is a two-part activity that dives deeper into family dynamics; you might consider breaking into two class periods.

* You may also choose to begin Activity 10.6: Developing a Care Management Plan. This activity pairs learners over the course of the training and allows them to practice developing and implementing a care plan with each other. You could also pair this activity with your Service Learning component. This might require extra time throughout the training course that will not be accounted for in this curriculum so make sure to plan ahead.
Chronic Disease Management 1 hour, 50 minutes

Learning Objectives:

- Identify some of the most common chronic diseases in the United States and discuss health inequalities in rates of chronic disease among populations.
- Apply the ecological model to analyze the causes and consequences of chronic conditions.
- Analyze and discuss the limitations of traditional medical models for the treatment of chronic conditions, and ways to integrate medical and public health approaches.
- Discuss team-based approaches to the delivery of primary health care, and the role and scope of practice of CHWs within these teams.
- Analyze and explain the concept of patient empowerment and the self-management of chronic conditions.
- Discuss the application of client-centered concepts and skills to supporting patients in learning how to effectively manage their own chronic conditions.

Words to Know

- **Adherence**: when the patient is actually taking all of the medications correctly, as prescribed.
- **Chronic condition**: an illness or health condition that lasts for at least three months (and typically much longer) and are generally slow to progress.
- **Concordance**: when the patient and clinician have the same understanding of how a medication should be taken.
- **Discordance**: the patient and the clinician have a different understanding.
- **Medication management**: working with a patient to ensure they are taking the right prescribed medications in the proper way in order to best treat their chronic conditions.
- **Panel management**: a system to efficiently identify patients with the greatest health risks, provide timely care, and prevent the progression of health conditions.

Lecture: Chronic Disease Management (60 minutes)
Thoroughly review the concepts covered in Chapter 16 and draw on any connections with the content covered in Chapter 10. You may choose to use the accompanying PowerPoint or follow along with the textbook. Make sure to touch on each of the following sections:

- Definition of Chronic Conditions (p. 421).
- Factors that Cause and Contribute to Chronic Conditions (p. 423).
- Individual.
- Family and Friends.
- Neighborhood and community.
- Societal.
- Stress.
- Consequences of Chronic Disease (p. 426).
- Treatment (p. 427).
- Integrating Medicine and Public Health (p. 432).
- Panel Management (p. 435).
- Self-Management (p. 437).
- Chronic Conditions and CHWs (p. 439).
- Client-Centered Concepts and Skills (p. 440).
- Action Planning (p. 441).
- Medication Management (p. 446).
- Responding to Ambivalence, Resistance and Relapse (p. 449).
- Follow-up (p. 450).
- Ending Services (p. 451).
**Group Activity** (50 minutes)
Choose one of the group activities from Chapter 16 based on the needs of the students in the classroom and the amount of time left in the session. Consider choosing activities that complement what was covered in the activities used in the first half of this module, without replicating the same themes or learning mechanisms.

**Review and Assessment**

**Reinforcing Concepts** (30 minutes)
Take half an hour to ask students questions from the day’s session. Possible review structures include: informally asking questions and waiting for students to raise their hands, forming a group competition, asking for written answers, or asking students to ask each other questions.

**Assessment** (Optional)
Choose an assessment from Chapters 10 or 16 to complete in class or send home as homework. We recommend 10.1: Care Coordination Quiz, 10.2: Case Study Assessment, or 16.3: Case Study Assignment, Mr. Chatterjee as in-class exercises. If you opt for take-home assignments, 16.2: Chronic Conditions Fact Sheet and Presentation and 10.3: Creating a Referral Guide with Key Local Resources are designed to take multiple weeks to complete, with options to work in groups.

**Service Learning**

This Service Learning activity will enhance skills learned in this module.

In this activity, learners will practice service coordination by developing a system navigation “map” for themselves or a patient.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Service Learning activity</th>
<th>Hours</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Coordination and System Navigation</td>
<td>• Develop system navigation “map” for two clients.</td>
<td>6</td>
<td>• Development of system navigation map.</td>
</tr>
</tbody>
</table>

**Service Learning Activities:**

(Activity and Assessment — Develop systems navigation maps for two clients:

- Use the supplied PowerPoint, “Navigating the Health Care System,” which describes the experience of two patients navigating the health care system.
- Draw the process each patient went through to get what they needed for their health. Consider the various steps they completed.

- Once you have drawn the map, highlight or indicate where a CHW might help in this process. Consider the service coordination that a CHW might do. Is there anywhere that a CHW might be able to assist health care providers, help clients understand services or bridge cultural or literacy gaps?

Alternatively, create a systems navigation map for yourself based on your personal experience in the health care system or for a client that you have worked with previously.)
Module 3: Education to Promote Health Behavior Change

Outline

Facilitating Community Health Education Trainings
  Review
  Group Activity 20.1: Learning Styles
  Lecture: Community Health Education
  Group Activity 20.2: Training Methods
  Group Activity 20.3: Designing a Short Training
Understanding Behavior Change
  Lecture: Understanding Behavior Change
  Group Activity 7.3: Behavior Change.
Review and Assessment
Service Learning

Trainer Preparation:

- Read Chapter 20 and Chapter 7.6–7.7.
- Read through instructions and handouts for in-class activities.
- Prepare materials needed for activities.

Learner Preparation:

- Read Chapter 20 and Chapter 7.6–7.7.
- Complete all self-assessments in the assigned chapters and be prepared to discuss in class.

Timing (Total — 8 hours):

- Lecture — 1 hour, 35 minutes.
- Activities — 4 hours, 25 minutes.
- Other — 1 hour.
- Breaks — 1 hour (break times are not written in, use your discretion).
- Service learning focused on education and promotion of healthy behaviors — 4 hours.

Materials:

- Name tags or table tents (suggested for at least the first few sessions).
- Copies of handouts and materials for:
  - Activity 20.1: Learning Styles
  - Computer and projector
- Slideshow presentation available at: [www.cdc.gov/healthyyouth/foodsafety/pdf/Effective_Teaching_Strategies.ppt](http://www.cdc.gov/healthyyouth/foodsafety/pdf/Effective_Teaching_Strategies.ppt)
- Copies of “Learner Handout 20.1 A: Effective and Less Effective Teaching or Training Methods.”
- Flipchart and markers.
- Activity 20.2: Training Methods
- Flipchart and markers.
- Copies of “Learner Handout 20.2 A: Training Methods.”
- One copy of “For the trainer 20.2 A: Training Methods Answer Key.”
- Activity 20.3: Designing a Short Training
- Copies of “Learner Handout 20.3 A: Designing a Brief Training.”
- Activity 7.3: Behavior Change
- Flipchart and markers or chalk/white board.
Learning Objectives:

After this session, participants will be able to:

- Chapter 20:
  - Identify different types of training that CHWs may facilitate.
  - Discuss some of the ways people learn new information and skills.
  - Describe and apply approaches to training commonly used by CHWs, including popular education, participatory learning and problem-based learning.
  - Identify and respond to common challenges that facilitators may face.
  - Develop a training plan, including goals and learning outcomes.
  - Develop a simple evaluation of a training.

- Chapter 7
  - Identify behaviors that clients may wish to change.
  - Apply the ecological model to analyze individual, family, community and societal factors that influence behavior and behavior change.
  - Discuss and analyze four common mistakes that CHWs make when supporting clients to change behaviors.
  - Discuss the central concepts of client-centered practice.
  - Explain the value of a strength-based approach to working with clients.
  - Discuss implicit theory and how you will develop your own implicit theories of behavior change.

Facilitating Community Health Education Trainings 4 hours, 30 minutes

Learning Objectives:

- Identify different types of training that CHWs may facilitate.
- Discuss some of the ways that people learn new information and skills.
- Describe and apply approaches to training commonly used by CHWs, including popular education, participatory learning and problem-based learning.
- Identify and respond to common challenges that facilitators may face.
- Develop a training plan, including goals and learning outcomes.
- Develop a simple evaluation of a training.

Words to Know

- **Auditory learners**: learners that learn by listening. They might enjoy a lecture, film or a small or large group discussion.
- **Conscientization**: the development of a critical consciousness about social and political realities.
- **Kinesthetic learners**: learners that need to interact with the material, to move around, touch or practice doing what it is they are trying to learn.
- **Learning outcomes**: a specific and measurable statement about what participants will know and know how to do as a result of a training.
- **Participatory learning**: presuming that a learner is also a teacher; interactive learning or knowledge sharing.
- **Popular education**: supports learners in “speaking their own word,” rather than repeating back the language, analysis, and ideas of trainers or anyone else.
- **Problem-based learning**: organizing learners into teams that work together to discover solutions to real-life problems.
- **Visual learners**: learners that need to see the material they are learning. They prefer films, photographs, drawings or observation.
Review (30 minutes)
Start the class by reviewing what was covered in the last two class sessions. Ask for definitions of key vocabulary or concepts and see if anyone had new thoughts over the last week or made any new connections to the material. Review lessons learned from any assigned assessment and ask a few students to report back on their Service Learning activities.

Group Activity (80 minutes)
Guide the class through Activity 20.1: Learning Styles, which begins with you purposefully giving a presentation with poor teaching skills. This activity will introduce the concept of adult learning and lecture styles.

Lecture: Community Health Education (45 minutes)
Spend 55 minutes lecturing on Chapter 20 — the Basics of Education and Training Facilitation for Behavior Change. You may choose to use the PowerPoint to guide the lecture or instead use this guide and the text book. Make sure to cover the following themes:

- Learning Styles (p. 581).
- Training Styles (p. 582).
- Popular Education
- Participatory Learning
- Problem Based Learning
- Planning and Preparation (p. 585).
- Tips for Participatory Training (p. 590).
- Common Challenges (p. 595).
- Evaluation (p. 598).

Lecture: Critical Awareness (10 minutes)
Take 10 minutes to talk about how to evaluate health information and tips for doing research on the internet. This material is not found in the text book so you will need to use the PowerPoint slides.

Group Activity (45 minutes)
Lead students in Activity 20.2: Training Methods. This activity breaks students up into small groups where they will review the pros and cons of different types of training techniques.

Group Activity (60 minutes)
Guide students through Activity 20.3: Designing a Short Training. In this activity, small groups will begin designing utilizing the concepts they have learned in Chapter 20.

Understanding Behavior Change

Learning Objectives:

- Identify behaviors that clients may wish to change.
- Apply the ecological model to analyze individual, family, community and societal factors that influence behavior and behavior change.
- Discuss and analyze four common mistakes that CHWs make when supporting clients to change behaviors.
- Discuss the central concepts of client-centered practice.
- Explain the value of a strength-based approach to working with clients.
- Discuss implicit theory and how you will develop your own implicit theories of behavior change.

(40 minutes) Lecture: Understanding Behavior Change — Spend 40 minutes lecturing on Chapter 7.6 and 7.7 — the Basics of Behavior Change Theory. You may choose to use the PowerPoint to guide the lecture or you may use the textbook. Make sure to cover the following themes:

- What to Change (p. 182).
- Factors that Influence Behavior (p. 183).
- Mistakes CHWs Make (p. 186).
- Client-Centered Practice (p. 190).

Group Activity (80 minutes)
Follow the instructions for Activity 7.3: Behavior Change. This activity allows for individual, small group and large group reflection on personal experiences with behavior change and the types of barriers their clients might face to making healthy changes.
Review and Assessment 30 minutes

Reinforcing Concepts (30 minutes)
Take half an hour to ask students questions from the day’s session. Possible review structures include: informally asking questions and waiting for students to raise their hands, forming a group competition, asking for written answers or asking students to ask each other questions.

Assessment (Optional)
Give students the reflective writing activity, Assessment 20.1: CHW Training Methods. You may assign this assessment as a take-home project or you can allot remaining class time.

Service Learning 4 hours

This Service Learning activity will enhance skills learned in this module.

Learners will practice using educational materials from their placement organization with a patient or client and then complete a health promotion reflection about their experience educating the client.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Service Learning activity</th>
<th>Hours</th>
<th>Assessment</th>
</tr>
</thead>
</table>
| Educating to Promote Health Behavior Change | • Practice using educational materials from organization with a patient or client.  
• Optional: Attendance or volunteering at health fair. | 4     | • Health promotion reflection. |

Service Learning Activities:

Practice using educational materials from organizations:

- Ask your supervisor or another CHW in your organization or site to provide you with some educational materials that they commonly use with patients or clients.
- Review these materials and ask any questions about them.
- Schedule a time to practice using the educational materials with a patient or client at your organization, a classmate or a family member, depending on your comfort level and availability.
- After delivering the educational materials, complete a health promotion reflection.
- Alternatively, you may attend or volunteer at a health fair. Be sure to actively interact with visitors and others tables at the fair.

Assessment — Health promotion reflection:

- Think about your experience with the health promotion activity and then write a brief (one page) reflection about this experience. You may want to consider the following questions:
  - What was it like to deliver these materials?
  - What else might you need to know to help deliver health education in the future?
  - Were there any questions that were difficult to answer?
  - What were the strengths and weaknesses of the educational material you were using?
Module 4: Advocacy

Outline

Advocacy
Review
Lecture: Advocacy
Group Activity — Activity 23.1: Consensus Decision-Making, Activity 23.2: Creating a Community Organizing Strategy, or Activity 23.3: Applying the Community Action Model
Group Activities — Activity 2.1: Radio Play: Voices from the History of Community Health Work and Activity 2.3: History of Community Health Work Timeline
Promoting the Health of Formerly Incarcerated People
Group Activity 15.1: Myth and Reality Icebreaker
Lecture: Health of Formerly Incarcerated People
Group Activity 15.4: Re-Entry Obstacle Course
Review and Assessment
Service Learning

Trainer Preparation:

- Read Chapter 23 and Chapter 15.
- Read through instructions and handouts for in-class activities.
- Prepare materials needed for activities.

Learner Preparation:

- Read Chapter 23 and Chapter 15.
- Complete all self-assessments in the assigned chapters and be prepared to discuss in class.

Timing (Total — 6 hours):

- Lecture — 1 hour, 55 minutes.
- Activities — 2 hours, 35 minutes.
- Other — 1 hour.
- Breaks — 30 minutes (break times are not written in, use your discretion).
- 4 hours of Service Learning that involves researching advocacy resources and participating in an advocacy campaign or event.

Materials:

- Copies of handouts and materials for:
  (There is room for variation in activities so refer to each activity sheet for the materials and handouts needed.)
  - Activity 2.1:
    - Copies of “Learner Handout 2.1 A: Radio Play.”
    - Activity 2.3:
      - Flipchart paper and markers.
      - Post-its.
      - “For the Trainer 2.3 A: “Timeline Activity Cards,” cut apart into cards.
  - Activity 15.1: Myth and Reality Icebreaker
    - A large sign with the word “MYTH” and another with the word “REALITY.”
Activity 15.4: Re-entry Obstacle Course
- Copies of “Learner Handout 15.4 A: Re-entry Scenario, Michelle.”
- Name tags, tent cards and markers.
- Copies of “Learner Handout 15.4 B: Re-entry Role Play Cards.”

**Learning Objectives:**
After this session, participants will be able to:

- Chapter 23:
  - Define and discuss community organizing.
  - Explain the difference between advocacy and community organizing.
  - Discuss at least two ways that contemporary models of community organizing are different from models used in the past.
  - Explain the five steps of the Community Action Model.
  - Discuss the CHW’s roles and responsibilities in the community organizing process and put them into practice.
  - Apply the Community Action Model to issues facing the communities you work with.
  - Explain the importance of integrating news media and social media into community organizing efforts.

- Chapter 15
  - Analyze the ways that incarceration influences the health of individuals, families and communities.
  - Identify common health issues faced by formerly incarcerated people.
  - Explain the stigma and the systemic barriers to reintegration faced by newly released prisoners.
  - Discuss the role of CHWs in promoting the health and well-being of formerly incarcerated people.
  - Examine best practices and emerging models for promoting the health of formerly incarcerated people.
  - Identify areas of potential policy change and the role of CHWs as advocates for change.
  - Learn about resources for successful re-entry.

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**Advocacy**

Learning Objectives:

- Define and discuss community organizing.
- Explain the difference between advocacy and community organizing.
- Discuss at least two ways that contemporary models of community organizing are different from models used in the past.
- Explain the five steps of the Community Action Model.
- Discuss the CHW’s roles and responsibilities in the community organizing process and put them into practice.
- Apply the Community Action Model to issues facing the communities with which you work.
- Explain the importance of integrating news media and social media into organizing efforts.
**Words to Know**

- **Community organizing**: a process by which people, usually a group of people who have been denied resources and participation in the decision-making process, work together to create social change that results in meaningful improvements in their lives.
- **Media advocacy**: the strategic use of any form of media to publicize and raise awareness about the problems that a community is facing and their goals for social change.
- **Policy**: a principle or protocol that guides actions and decisions, often by establishing incentives or penalties.
- **Power analysis**: a research product that identifies who will support you in your organizing efforts and who may oppose you.
- **Social Media**: media that enable people to communicate frequently and broadly using technology, whether on phones, computers or other devices.
- **Community Action Model** (p. 675).
- **The Role of CHWs** (p. 682).

**Review** (30 minutes)
Start the class by reviewing what was covered in the last three class sessions. Ask for definitions of key vocabulary or concepts and see if anyone had new thoughts over the last week or made any new connections to the material. Review lessons learned from any assigned assessment and ask a few students to report back on their Service Learning activities.

**Lecture: Advocacy** (75 minutes)
Spend an hour and fifteen minutes lecturing on Chapter 23 — the Basics of Advocacy. You may choose to use the PowerPoint to guide the lecture or instead use this guide and the text book. Make sure to cover the following themes:

- Why Organize? (p. 667).
- What is Community Organizing? (p. 668).
- Models of Practice (p. 669).
- Strategies and Tactics of Community Organizing (p. 671).

**Group Activity** (75 minutes)
Choose between Activity 23.1: Consensus Decision-Making, Activity 23.2: Creating a Community Organizing Strategy, and Activity 23.3: Applying the Community Action Model. Each activity reinforces a different element of the Advocacy competency so decide based on which skill is most useful to your particular group of CHW learners.

**Group Activity** (2 hours, 15 minutes)
Lead the class through Activity 2.1: Radio Play: Voices from the History of Community Health Work and Activity 2.3: History of Community Health Work Timeline. Advocacy also includes advocacy for the CHW workforce and role, so it's important to understand the global context of CHWs throughout history.

**Promoting the Health of Formerly Incarcerated People**

**Learning Objectives:**

- Analyze the ways that incarceration influences the health of individuals, families and communities.
- Identify common health issues faced by formerly incarcerated people.
- Explain the stigma and the systemic barriers to reintegration faced by newly released prisoners.
- Discuss the role of CHWs in promoting the health and well-being of formerly incarcerated clients.
- Examine best practices and emerging models for promoting the health of formerly incarcerated people.
- Identify areas of potential policy change and the role of CHWs as advocates for change.
- Learn about resources for successful re-entry.
Words to Know

- **Recidivism**: returning to jail or prison.
- **Re-entry**: returning home from jail or prison.

**Group Activity** (20 minutes)
Guide the class in Activity 15.1: Myth and Reality Icebreaker. This short activity will introduce the topic of incarceration and some of the misconceptions that surround it.

**Lecture: The Health of Formerly Incarcerated People** (40 minutes)
Spend 40 minutes lecturing on Chapter 15 — Incarceration and Health. You may choose to use the PowerPoint to guide the lecture or you may use the textbook. Make sure to cover the following themes:

- Basic Terms and Language (p. 395).
- Incarceration in the United States (p. 396).
- Health Impacts of Incarceration (p. 397).
- Conditions in Jails and Prisons.
- Mental Health.
- Social Conditions.
- Impacts on Families and Communities (p. 401).
- Challenges of Re-Entry (p. 403).
- The Role of CHWs (p. 408).

**Group Activity** (60 minutes)
Set-up and guide the class through Activity 15.4: Re-Entry Obstacle Course. This interactive activity will allow students to understand the real challenges faced by previously incarcerated people as they re-enter the community.

**Review and Assessment**

**Reinforcing concepts** (30 minutes)
Take half an hour to ask students questions from the day’s session. Possible review structures include: informally asking questions and waiting for students to raise their hands, forming a group competition, asking for written answers or asking students to ask each other questions.

**Assessment** (Optional)
Give the students Assessment 23.1: Community Organizing Campaign or Assessment 15.1: Letter to a Decision Maker. These assessments require research and therefore are best implemented as a take-home project.

**Service Learning**

This Service Learning activity will enhance skills learned in this module.

Learners will complete an advocacy resource table and participate in an advocacy campaign or event (policy making or organizing meeting, letter writing campaign, etc.).

<table>
<thead>
<tr>
<th>Competency</th>
<th>Service Learning activity</th>
<th>Hours</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advocacy</td>
<td>• Working with or on behalf of people or communities to exercise their rights and gain access to resources.</td>
<td>4</td>
<td>• Completion of advocacy resource table.</td>
</tr>
<tr>
<td></td>
<td>• Develop list of advocacy resources that can be used by an organization.</td>
<td></td>
<td>• Participatory action (such as attend a policy making meeting, organizing meeting, write an official, etc.).</td>
</tr>
</tbody>
</table>
Service Learning Activities

Activities and Assessment — Advocacy Resources:

- Complete the advocacy resource table.
- Please find at least three advocacy-focused organizations in your area and fill out the table below.

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<thead>
<tr>
<th>Advocacy #1</th>
<th>Address:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone number:</td>
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<td>Website/phone resources:</td>
<td></td>
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<td>Services provided:</td>
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<table>
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<tr>
<td>Website/phone resources:</td>
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<td>Services provided:</td>
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<thead>
<tr>
<th>Advocacy #3</th>
<th>Address:</th>
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<tbody>
<tr>
<td>Phone number:</td>
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<tr>
<td>Website/phone resources:</td>
<td></td>
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<tr>
<td>Services provided:</td>
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</table>
Module 5: Individual and Community Capacity Building

Outline

Group Facilitation
  Review
    Lecture: Group Facilitation
    Group Activity 21.2: Group Facilitation Practice

Health Outreach
  Lecture: Health Outreach
  Group Activity 19.1: Talking Wall, Outreach Experiences

Review and Assessment

Service Learning

Trainer Preparation:
- Read Chapters 19 and 21.
- Read through instructions and handouts for in-class activities.
- Prepare materials needed for activities.

Learner Preparation:
- Read Chapters 19 and 21.
- Complete any assigned assessments and Service Learning activities/reflections.

Timing (Total — 4 hours):
- Lecture — 2 hours.
- Activities — 1 hour.
- Other — 1 hour.
- Breaks — there are no breaks built into this short session. If time permits, you may work a break into the class as you see fit.
- Service learning focused on understanding community resources and observing group facilitation — 6 hours.

Materials:
- Copies of handouts and materials for:
  - Activity 21.2: Group Facilitation Practice
    - Copies of “Learner Handout 21.2 A: Roles of Group Participants, Co-Facilitators, and Observers”
  - Activity 19.1: Training Methods (Optional)
    - Four posters or flipcharts.
    - A marker for each student.

Learning Objectives:

After this session, participants will be able to:
- Chapter 21:
  - Discuss how and why group work is different from working with individual clients.
  - Identify and describe different types of groups.
  - Describe the unique benefits of group work.
  - Explain four key stages of group work and analyze the roles and tasks of facilitators at each stage.
  - Analyze how issues of power and authority, including the authority of the group facilitator, influence group dynamics and processes.
  - Discuss the importance of self-reflection and evaluation to becoming a skilled group facilitator and apply this to your work.
  - Identify and respond to common challenges of group work.
  - Discuss and apply ethics to group work, including issues of cultural humility, boundaries and confidentiality.
• Chapter 19
  • Define outreach.
  • Discuss the types of communities served and the health issues addressed through outreach.
  • Identify and provide examples of different outreach levels and methods.

• Describe and apply strategies for approaching people you do not know.
• Identify key safety concerns and strategies for outreach workers.
• Document outreach services accurately and explain the importance of doing so.
• Develop an outreach plan.

Group Facilitation  2 hours, 30 minutes

Learning Objectives:
• Discuss how and why group work is different from working with individual clients.
• Identify and describe different types of groups.
• Describe the unique benefits of group work.
• Explain four key stages of group work and analyze the roles and tasks of facilitators at each stage.
• Analyze how issues of power and authority, including the authority of the group facilitator, influence group dynamics and processes.
• Discuss the importance of self-reflection and evaluation to becoming a skilled group facilitator and apply this to your work.
• Identify and respond to common challenges of group work.
• Discuss and apply ethics to group work, including issues of cultural humility, boundaries and confidentiality.

Words to Know
• Cohesion: togetherness; groups sharing common processes and influencing members to try new ways of thinking, feeling, and behaving.
• Contagion: the spread of attitudes or behaviors from one member to the group.
• Self-disclosure: when a CHW or other helping professional shares personal information about themselves with clients.

Review (30 minutes)
Start the class by reviewing what was covered in the last few class sessions. Ask for definitions of key vocabulary or concepts and see if anyone had new thoughts over the last week or made any new connections to the material. Review lessons learned from any assigned assessment and ask a few students to report back on their Service Learning activities.

Lecture: Group Facilitation (60 minutes)
Spend 50 minutes lecturing on Chapter 21 — the Basics of Group Facilitation. You may choose to use the textbook. Make sure to cover the following themes:
• Key Factors Among Groups (p. 603).
• Types of Groups (p. 605).
• Advantages of Group Work (p. 607).
• Group Functions and Processes (p. 609).
• Roles and Abilities of Group Facilitators (p. 611).
• Facilitation Techniques (p. 612).
• Stages of Group Work (p. 619).
• Challenges of Group Facilitation (p. 627).
Group Activity (60 minutes)
Follow the instructions for Activity 21.2: Group Facilitation Practice. This activity will guide students through role-playing in group sessions and allow them to practice and observe facilitation techniques.

Health Outreach

Learning Objectives:
- Define outreach.
- Discuss the types of communities served and the health issues addressed through outreach.
- Identify and provide examples of different outreach levels and methods.
- Describe and apply strategies for approaching people you do not know.
- Identify key safety concerns and strategies for outreach workers.
- Document outreach services accurately and explain the importance of doing so.
- Develop an outreach plan.

Words to Know
- **Venue**: a particular place where a priority population spends significant time.
- **Key opinion Leaders**: people who the community respects and looks to for guidance.
- **Social marketing**: applies the same methods that businesses use to sell products to promote specific health outcomes.

Lecture: Health Outreach (60 minutes)
Spend an hour lecturing on Chapter 19 — the Basics of Conducting Health Outreach. You may choose to use the PowerPoint to guide the lecture or instead use this guide and the text book. Make sure to cover the following themes:
- Qualities of Successful Outreach Workers (p. 551).
- Communities Served and Health Issues Addressed (p. 552).
- Outreach Levels and Methods (p. 553).
- Planning Health Outreach (p. 558).
- Conducting Health Outreach (p. 560).
- Safety Issues (p. 567).
- Documenting Health Outreach Services (p. 571).
- Ethics and Health Outreach (p. 572).
- Supervision and Support (p. 573).

Group Activity (Optional)
If time permits, lead students in Activity 19.1: Talking Wall, Outreach Experiences. This activity involves students moving around the room and sharing their experiences and insights into effective outreach techniques.
Review and Assessment 30 minutes

Reinforcing Concepts (30 minutes)
Take half an hour to ask students questions from the day’s session. Possible review structures include: informally asking questions and waiting for students to raise their hands, forming a group competition, asking for written answers or asking students to ask each other questions.

Assessment (Optional)
Give students the activity, Assessment 19.1: Health Outreach Quiz or Assessment 21.1: Reflective Writing. You may assign this assessment as a take-home project or you can allot remaining class time.

Service Learning 6 hours

This Service Learning activity will enhance skills learned in this module.

Learners will interview representatives from two organizations from your resource list and then reflect on the process. Optionally, they may also attend a local open meeting, such as Alcoholics Anonymous.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Service Learning activity</th>
<th>Hours</th>
<th>Assessment</th>
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</thead>
<tbody>
<tr>
<td>Individual and Community Capacity Building</td>
<td>• Interviews with two community resources. • Optional: Attendance an open local meeting (such as AA, NA, Alanon, etc.).</td>
<td>6</td>
<td>• Written reflection on attendance at local meeting; written reflection on one interview with community resources.</td>
</tr>
</tbody>
</table>
Module 6: Effective Communication Strategies

Outline

Conflict Resolution Skills
- Review
  - Group Activity 13.2: Self-Reflection About Conflict
  - Lecture: Conflict Resolution
  - Activity 13.3: Switching the Frame for Viewing Conflict
  - or Activity 13.5: Developing a Common Framework
  - for Conflict Resolution

Professional Communication Skills
- Group Activity 14.1: Code Switching
- Lecture: Professional Communication Skills
- Group Activity 14.2: Providing and Receiving
  - Constructive Feedback
  - Activity 14.3: Part 1, Developing a Professional Resume

Review and Assessment

Service Learning

Trainer Preparation:
- Read Chapter 13 and Chapter 14.
- Read through instructions and handouts for in-class activities.
- Prepare materials needed for activities.

Learner Preparation:
- Read Chapter 13 and Chapter 14.
- Complete any assigned assessments and Service Learning activities/reflections.
- Print and bring a copy of your current resume.

Timing (Total — 8 hours, 30 minutes):
- Lecture — 1 hour, 20 minutes
- Activities — 5 hours, 30 minutes
- Other — 1 hour
- Breaks — 40 minutes (break times are not written in, use your discretion).
- 2 hours of Service Learning focused on practicing communication skills at site placement.

Materials:
- Copies of handouts and materials for:
  - Activity 13.2
    - Computer and projector.
    - Internet access to view online video.
    - Copies of “Learner Handout 13.2 A: Video of a Conflict Between Two CHWs: Discussion Questions.”
  - Video: “Conflict Between Two CHWs: Role Play, Foundations.” (http://youtu.be/8wHwnanhC1y)
  - Activity 13.5
    - Computer and projector.
    - Internet access to view online video.
    - Video: “Conflict Between Two CHWs: Role Play, Foundations.” (http://youtu.be/8wHwnanhC1y)
Learning Objectives:
After this session, participants will be able to:

- Chapter 13:
  - Define the terms conflict and conflict resolution.
  - Identify common sources of conflict in the workplace.
  - Discuss the importance of understanding personal and cultural conflict styles and become more familiar with your own conflict style.
  - Discuss how power and anger can affect conflict resolution.
- Chapter 14:
  - Identify and practice verbal and written communication skills relevant for CHWs, including how to provide and receive constructive feedback in a professional manner.
  - Discuss the challenge of establishing healthy professional boundaries and making sound choices regarding disclosure of personal information.

Conflict Resolution Skills 3 hours

Learning Objectives:
- Define the terms “conflict” and “conflict resolution.”
- Identify common sources of conflict in the workplace.
- Discuss the importance of understanding personal and cultural conflict styles and become more familiar with your own conflict style.
- Discuss how power and anger can affect conflict resolution.
- Implement steps to take to handle your own anger professionally and to de-escalate the anger of others.
- Negotiate a common framework and process for resolving conflict and explain why this is so important.
- Apply essential listening skills during conflict and discuss their importance for conflict resolution.
- Explore and apply a conflict resolution model that you can adapt to your situation.

Words to Know
- **Mediation**: when a neutral person is asked to facilitate communication between the disputants as they express their feelings and needs and identify issues.
Review (30 minutes)
Start the class by reviewing what was covered in the last few class sessions. Ask for definitions of key vocabulary or concepts and see if anyone had new thoughts over the last week or made any new connections to the material. Review lessons learned from any assigned assessment and ask a few students to report back on their Service Learning activities.

Group Activity (30 minutes)
Guide students through Activity 13.2: Self-Reflection About Conflict. This activity will frame the rest of the session by allowing students to reflect on their own response to conflict and their areas for growth.

Lecture: Conflict Resolution (50 minutes)
Spend 60 minutes lecturing on Chapter 13 — the Basics of Conflict Resolution. You may choose to use the PowerPoint to guide the lecture or instead use this guide and the text book. Make sure to cover the following themes:

- Common Sources of Workplace Conflict (p. 349).
- Common Sources of Conflict for Clients (p. 351).
- Common Responses to Conflict (p. 352).
- The Challenge of Anger (p. 355).
- Approaches to Handling Conflict on the Job (p. 359).
- Communication Skills for Conflict Resolution (p. 360).
- Models of Conflict Resolution (p. 365).

Group Activity (70 minutes)
Lead students in either Activity 13.3: Switching the Frame for Viewing Conflict or Activity 13.5: Developing a Common Framework for Conflict Resolution. The first allows students to examine conflicts from various angles while the second involves role-playing conflicts and their resolutions.

Professional Communication Skills

4 hours, 20 minutes

Learning Objectives:

- Identify and practice verbal and written communication skills relevant for CHWs, including how to provide and receive constructive feedback in a professional manner.
- Discuss the challenge of establishing healthy professional boundaries and making sound choices regarding disclosure of personal information.

Words to Know

- **Corrective feedback**: indicates desired changes in behavior by explaining what didn't work, is unacceptable in the workplace or needs improvement.
- **Supportive feedback**: feedback that reinforces current behaviors and skills by identifying what is being done well or right.

Group Activity (90 minutes)
Lead the students in Activity 14.1: Code Switching. This activity will work through an important concept for CHWs, who often work in a variety of settings, each with very different cultural norms and expectations. This activity involves small and large group discussions.

Lecture: Professional Communication Skills

(30 minutes)
Spend 30 minutes lecturing on Chapter 14.3, beginning on page 381. You may choose to use the PowerPoint to guide the lecture or you may use the textbook. Make sure to cover the following themes:

- Verbal Communication and Body Language (p. 381).
• Giving and Receiving Constructive Feedback (p. 383).
• Communicating with your Supervisor (p. 385).
• Boundary Issues at Work (p. 386).

**Group Activity** (90 minutes)
Follow the instructions for Activity 14.2: Providing and Receiving Constructive Feedback. This activity will allow students to practice both giving and receiving feedback through role-playing sessions.

**Review and Assessment** 30 minutes

**Reinforcing Concepts** (30 minutes)
Take half an hour to ask students questions from the day’s session. Possible review structures include: informally asking questions and waiting for students to raise their hands, forming a group competition, asking for written answers or asking students to ask each other questions.

**Assessment** (Optional)
Give students the activity Assessment 13.1: Reflective Writing Assignment or Assessment 13.2: Quiz. You may assign this assessment as a take-home project or you can allot remaining class time.

**Service Learning** 2 hours

This Service Learning activity will enhance skills learned in this module.

Learners will practice the communication skills reviewed in Module 6 and then debrief with their supervisor.

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<tr>
<th>Competency</th>
<th>Service Learning activity</th>
<th>Hours</th>
<th>Assessment</th>
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</thead>
<tbody>
<tr>
<td>Effective Communication Strategies</td>
<td>• Practice effective communication strategies with on-site supervisor — follow up discussion with supervisor to review opportunities for improvement and strengths.</td>
<td>2</td>
<td>• Completion of discussion with a Service Learning supervisor.</td>
</tr>
<tr>
<td>• Listening carefully and communicating respectfully in ways that are meaningful to the individual.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Includes listening, speaking, gathering and sharing information, resolving conflict and checking for understanding.</td>
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</table>
Service Learning Activities

*Practice effective communication strategies:*

- Schedule a time to meet with your on-site supervisor (set aside 60 minutes).
- Prepare for your meeting by thinking about and researching effective communication strategies. You can draw from materials in the course, online or your own experience. Develop a set of questions to discuss with your supervisor when you meet with him or her. Below are some examples of the types of questions you might ask:
  - How do you define effective communication?
  - How could I improve my communication style/skills? As a CHW with clients? In communicating with supervisors?
  - What are some of the ways you communicate effectively with CHWs that you supervise? Clients that you have worked with?

*Completion of discussion with Service Learning supervisor:*

- Once you have completed the discussion, take time to reflect on the conversation you had.
- Be sure to have your supervisor sign the information below, indicating that you completed this Service Learning activity.

_____________________________ has successfully discussed communication strategies.

(CHW trainee name)

Interview date: __________________________

Supervisor name: __________________________

Supervisor signature: __________________________

CHW signature: __________________________
Module 7: Cultural Responsiveness

Outline

Practicing Cultural Humility
- Review
  - Activity 14.3: Part 2, Developing and Critiquing a Professional Resume
- Lecture: Cultural Humility
- Group Activity 6.3: Practicing Cultural Humility
- Role Plays

Promoting Healthy Eating and Active Living
- Lecture: Healthy Eating and Active Living
- Group Activity 17.2: Values Clarification

Understanding Trauma and Supporting the Recovery of Survivors
- Lecture: Trauma and Recovery
- Group Activity 18.2: Trauma Responses
- Lecture: Working with Survivors of Trauma
- Group Activity 18.4: To Do and Not to Do: Guidelines for Working with Survivors of Trauma

Review and Assessment

Service Learning

Trainer Preparation:
- Re-read Chapter 6 and read chapters 17 and 18.
- Read through instructions and handouts for in-class activities.
- Prepare materials needed for activities.

Learner Preparation:
- Re-read Chapter 6 and read chapters 17 and 18.
- Prepare or revise a resume (Activity 14.3).
- Complete any assigned assessments and Service Learning activities/reflections.

Timing (Total — 11 hours):
- Lecture — 3 hours, 40 minutes.
- Activities — 5 hours, 10 minutes.
- Other — 1 hour, 15 minutes.
- Breaks — 45 minutes (break times are not written in, use your discretion).
- Service learning that will allow for reflection on cultural responsiveness — 2 hours.

Materials:
- Copies of handouts and materials for:
  - Activity 6.3
    - Flipchart and markers.
    - Paper and pens.
    - Copies of “Learner Handout 6.3 A: Small Group Discussion Questions.”
  - Activity 17.2
    - Copies of “Learner Handout 17.2 A: Self-Assessment.”
  - Activity 18.2
    - Flipchart and markers.
  - Activity 18.4
    - Flipchart and markers.
Learning Objectives:
After this session, participants will be able to:

- Chapter 6:
  - Define the concept of cultural humility.
  - Describe the changing population in the United States and how this affects the work of CHWs.
  - Discuss how historical and institutional discrimination affects the health of targeted communities and influences their work with public health providers.
  - Analyze the importance of becoming lifelong learners and practitioners of cultural humility.
  - Discuss and analyze concepts of traditional health beliefs and practices and how they may influence the delivery of services to clients.
  - Create a personal learning plan in order to become a culturally effective CHW.

- Chapter 17:
  - Identify key challenges to changing diets and levels of physical activity.
  - Explain general guidelines for healthier eating and drinking.
  - Explain general guidelines for healthy levels of regular activity or exercise.
  - Analyze why a focus on health rather than weight may be most effective in supporting a client's well-being and in fostering positive relationships between CHWs and their clients.
  - Explain a five-step approach to providing health education about nutrition, physical activity or other health topics.
  - Describe how to apply client-centered concepts and skills for supporting clients to establish healthier patterns of eating and activity.

- Chapter 18:
  - Define trauma and post-traumatic stress disorder (PTSD).
  - Explain how common exposure to trauma is in the United States.
  - Identify common responses to trauma (symptoms and effects) for individuals and communities.
  - Identify a variety of strategies for healing from trauma for individuals and communities.
  - Discuss ways to promote community resiliency to trauma.
  - Analyze the CHW scope of practice when working with survivors of trauma, and when and how to provide referrals.
  - Explain and demonstrate key skills for working with survivors of trauma.
  - Identify strategies to support groups and communities in responding to trauma.

Practicing Cultural Humility (Revisiting Chapter 6)                            2 hours, 50 minutes

Learning Objectives:

- Define the concept of cultural humility.
- Describe the changing population in the United States and how this affects the work of CHWs.
- Discuss how historical and institutional discrimination affects the health of targeted communities and influences their work with public health providers.
- Analyze the importance of becoming lifelong learners and practitioners of cultural humility.
- Discuss and analyze concepts of traditional health beliefs and practices, and how they may influence the delivery of services to clients.
- Create a personal learning plan in order to become a culturally effective CHW.
Words to Know

- **Gender identity**: someone’s own sense of being female or male, both or neither, and what that means to him, her or them.

- **Heterogeneity**: diversity within a culturally defined community.

- **Structural racism and discrimination**: inequities are built into the key systems of a society, such as the education, legal, employment, housing and health care systems.

**Review** (30 minutes)
Start the class by reviewing what was covered in the last few class sessions. Ask for definitions of key vocabulary or concepts and see if anyone had new thoughts over the last week or made any new connections to the material. Review lessons learned from any assigned assessment and ask a few students to report back on their Service Learning activities.

**Developing a Resume** (50 minutes)
Facilitate Part 2 of Activity 14.3: Developing and Critiquing a Professional Resume. This activity involves peer review of students’ resumes and allows them to discuss challenges they have had with the resume-building process.

**Lecture: Cultural Humility** (40 minutes)
Spend 30 minutes revisiting the themes covered in Module 1 on cultural humility. Draw connections with what the class has covered over the last six modules and take note of any changing thought processes or viewpoints in the classroom. You may choose to use the PowerPoint as a resource or follow the textbook. Make sure to touch on and reinforce the following themes:

- Definition of Cultural Humility (p. 137).
- Requirements for Practicing Cultural Humility (p. 138–139).
- Structural Racism and Discrimination in Public Health (p. 140–142).
- Definition of Culture (p. 140).
- Building Cultural Self-Awareness and Capacity (p. 144–147).
- Culture and Health Beliefs (p. 147–150).

**Group Activity** (60 minutes)
Lead students in Activity 6.3: Practicing Cultural Humility Role Plays. This is an opportunity for students to revisit this activity from Module 1 and practice new behaviors or frame shifts.

**Promoting Healthy Eating and Active Living** 2 hours, 30 minutes

**Learning Objectives:**

- Identify key challenges to changing diets and levels of physical activity.
- Explain general guidelines for healthier eating and drinking.
- Explain general guidelines for healthy levels of regular activity or exercise.
- Analyze why a focus on health rather than weight may be most effective in supporting a client’s well-being and in fostering positive relationships between CHWs and their clients.
- Explain a five-step approach to providing health education about nutrition, physical activity or other health topics.
- Describe how to apply client-centered concepts and skills for supporting clients to establish healthier patterns of eating and activity.
Words to Know

- **Body Mass Index (BMI)**: a calculation using weight and height that is divided into four categories: under-weight, normal, overweight and obese.
- **Food security**: having enough food to eat.
- **Food insecurity**: not having enough food to eat.
- **Saturated fat**: butter, lard and other animal fats.
- **Trans fats**: created in the food manufacturing process by adding hydrogen to vegetable fats so they will become solids and last a long time on the shelf.
- **Vegetarian**: a diet that includes no meat.
- **Vegan**: a diet that includes no animal products at all, including dairy.
- **Weight-cycling**: a repeated pattern of dieting and initial weight loss followed by weight gain.
- **Weight-inclusive**: an approach that implies respect for people of all body sizes and weight.
- **Weight-normative**: an approach that identifies certain people as having normal weight and others as overweight or obese.

Lecture: Healthy Eating and Active Living (90 minutes)

Spend an hour and a half lecturing on Chapter 17 — the Promotion of Healthy Eating and Active Living. You may choose to use the PowerPoint to guide the lecture or instead use this guide and the text book. This section might seem out of place in the Cultural Responsiveness Module, but having sensitivity around conversations about weight and lifestyle choices are key to the work of a CHW. Be sure to weave cultural awareness into your conversations throughout the lecture. Make sure to cover the following themes:

- What We Eat and Drink (p. 460).
- Common Barriers to Changing Our Diets (p. 461).
- Weight and Health (p. 462).
- Understanding Information about Nutrition (p. 467).
- Guidelines for Healthy Nutrition (p. 467).
- Practical Guidelines for Healthier Eating (p. 470).
- Approaches to Providing Health Education about Nutrition (p. 472).
- Guidelines for Healthy Activity (p. 477).
- Supporting Clients to Increase Activity Levels (p. 478).

Group Activity (60 minutes)

Lead students in Activity 17.2: Values Clarification. This activity will allow learners to examine their own beliefs about weight and eating and examine how that affects their work with clients.
Understanding Trauma and Supporting the Recovery of Survivors  4 hours

Learning Objectives:

- Define trauma and post-traumatic stress disorder (PTSD).
- Explain how common exposure to trauma is in the United States.
- Identify common responses to trauma (symptoms and effects) for individuals and communities.
- Identify a variety of strategies for healing from trauma for individuals and communities.
- Discuss ways to promote community resiliency to trauma.
- Analyze the CHW scope of practice when working with survivors of trauma, and when and how to provide referrals.
- Explain and demonstrate key skills for working with survivors of trauma.
- Identify strategies to support groups and communities in responding to trauma.

Words to Know

- Cognitive-behavioral therapy: a therapy technique that assists the client in understanding how their thought patterns and behaviors may affect them.
- Historical trauma: the way in which post-traumatic stress can be passed down across generations within communities that have faced extreme trauma such as slavery and genocide.
- Post-traumatic stress disorder (PTSD): a condition diagnosed when someone has been exposed to one or more traumatic events, either directly or through witnessing it.
- Somatic therapies: therapy that engages the body in ways that promote healing (physical movements, etc.).
- Resiliency: the ability to bounce back after difficult events.
- Secondary resilience: internalizing and benefiting from the opportunities to witness courage, creativity, generosity and resilience from clients.
- Secondary trauma: developing signs and symptoms of traumatic stress reactions over time through witnessing the trauma stories of clients or community members.
- Trauma-informed approach: the understanding of the widespread impact of trauma and the potential paths for recovery; seeking to actively resist re-traumatization.

Lecture: Trauma and Recovery (45 minutes)
Spend 45 minutes lecturing on the first half of Chapter 18, being careful to leave room for discussion and making sure learners are respectful of potential survivors in the room. You may choose to use the PowerPoint to guide the lecture or you may use the textbook. Make sure to cover the following themes:

- Defining Trauma and Post-Traumatic Stress (p. 490).
- Post-Traumatic Stress Disorder (PTSD) (p. 494).
- A Common Language for Trauma Responses (p. 495).
- Collective Impacts (p. 501).
- Cultural Humility and Trauma (p. 503).
- Healing from Trauma (p. 504).
- Prevention and Resiliency (p. 509).

Group Activity (80 minutes)
Lead the class through Activity 18.2: Trauma Responses, a small and large group activity that will dive into the effects of trauma on survivors and their health.

Lecture: Working with Survivors of Trauma (45 minutes)
Spend 45 minutes lecturing on the rest of Chapter 18.
You may choose to use the PowerPoint to guide the lecture or you may use the textbook. Make sure to cover the following themes:

- The CHW Scope of Practice (p. 511).
- Guidelines for Working with Survivors (p. 517).
- Screening a Client for the Risk of Suicide (p. 529).
- Facilitating Groups with Trauma Survivors (p. 532).
- Trauma-Informed Practice (p. 537).
- Secondary Trauma, Secondary Resilience (p. 538).
- Self-Care (p. 540).

**Group Activity** (70 minutes)
Guide the learners through Activity 18.4: To Do and Not to Do: Guidelines for Working with Survivors of Trauma. This activity will allow the class to work through how to change their approach to working with a client if that client has experienced trauma.

**Review and Assessment** 45 minutes

**Reinforcing Concepts** (45 minutes)
Take half an hour to ask students questions from the day’s session. Possible review structures include: informally asking questions and waiting for students to raise their hands, forming a group competition, asking for written answers or asking students to ask each other questions.

**Assessment** (Optional)
Give students the activity Assessment 6.1: Cultural Humility Personal Plan or Assessment 17.1 Take-Home Case Study Exam. You may assign this assessment as a take-home project or you can allot remaining class time.

**Service Learning** 2 hours
This Service Learning activity will enhance skills learned in this module.
Learners will practice the communication skills reviewed in Module 6 and then debrief with their supervisor.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Service Learning activity</th>
<th>Hours</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural Responsiveness</td>
<td>Discuss cultural responsiveness with on-site supervisor to see how they provide culturally appropriate health education and are culturally responsive to clients.</td>
<td>2</td>
<td>Brief presentation about cultural responsiveness.</td>
</tr>
</tbody>
</table>

**Service Learning Activities:**

**Discuss cultural responsiveness:**

- Schedule a time to meet with your supervisor or another CHW at your site.
- Prepare for this meeting by reflecting on cultural responsiveness and prepare questions to discuss with the person you are meeting. These questions may draw from course materials, online materials, or your own experiences.
- Meet with your supervisor or another CHW in your organization for approximately 60 minutes.

**Reflection about cultural responsiveness:**

- Prepare a brief (five minute) presentation to discuss your experience with this activity. Your presentation may include a poster, PowerPoint or written reflection. In addition to sharing your experience with the class, please include a question for class discussion.
- You will present your reflection on a date, which the class will decide on together.
Module 8: Documentation and Reporting

Outline

Documentation and Reporting
Review
Lecture: Documentation
Case Study Exercise
Lecture: Medical Abbreviations
Group Activity 8.6: Role Play Demonstration to Practice Note-Taking Skills
CHW Panel Activity 1.3
Review and Assessment
Service Learning

Trainer Preparation:

- Invite CHW presenters for the CHW Panel (Activity 1.3).
- There is no textbook reading for this module.
- Read through accompanying slide-deck.
- Read through instructions and handouts for in-class activities.
- Prepare materials needed for activities.

Learner Preparation:

- There is no textbook reading for this module.
- Complete any assigned assessments and Service Learning activities/reflections.

Timing (Total — 5 hours, 30 minutes):

- Lecture — 1 hour, 10 minutes
- Activities — 3 hours
- Other — 1 hour
- Breaks — 20 minutes (break times are not written in, use your discretion).
- Service learning that allows learners to practice using documentation skills on real cases – 8 hours.

Materials:

- Copies of handouts and materials for:
  - SOAP Activity Case Study.
  - Activity 8.6
    - “For the Trainer 8.6 A: Role Play Scenario for Note-Taking Activity.”
    - Copies of “Learner Handout 8.6 A: Client Intake Form.”
    - “For the Trainer 8.6 B: Client Intake Form.”
  - Activity 1.3
  - Nametags and pens

Learning Objectives:

- After this session, participants will be able to:
  - Understand the importance of collecting and documenting health information accurately.
  - Explain the purpose of various types of collection tools and methods for health and social information.
  - Participate in the collection and documentation of health and social information.
  - Understand common medical terminology.
Documentation

Learning Objectives:

- Understand the importance of collecting and documenting health information accurately.
- Explain the purpose of various types of collection tools and methods for health and social information.
- Participate in the collection and documentation of health and social information.
- Understand common medical terminology.

Review (30 minutes)
Start the class by reviewing what was covered in the last few class sessions. Ask for definitions of key vocabulary or concepts and see if anyone had new thoughts over the last week or made any new connections to the material. Review lessons learned from any assigned assessment and ask a few students to report back on their Service Learning activities.

Lecture: Documentation (40 minutes)
This module does not use the text book. Use the slides to teach on the importance of documentation, incorporating about 10 minutes for a class discussion on the ethical obligations of reporting. Details can be found in the “presenter notes” section in PowerPoint.

Group Activity (40 minutes)
Use the accompanying SOAP Case Study (NOT part of the Foundations materials) to help students practice taking notes with the SOAP method. The activity presents a case study and asks learners to fill out notes using the information presented. This is available at the end of this chapter. Additional materials are also available and can be used depending on the needs of the students.

Lecture: Medical Abbreviations (30 minutes)
This module does not use the text book. The slides will guide you through the lecture on medical abbreviations and allow for class discussion around their experience with medical jargon.

Group Activity (50 minutes)
Lead the class in Activity 8.6: Role Play Demonstration to Practice Note-Taking from the Foundations materials. The activity will allow learners to practice taking notes as their classmates demonstrate a client interaction.

Guest Presenters (90 minutes)
Organize a CHW Panel based on the guidelines provided in Activity 1.3: CHW Panel — Experts in the Field. Introducing students to individuals already working as CHWs will help them conceptualize the CHW role and start to build their professional network. This activity is found in multiple modules throughout this training, so consider grouping the CHWs you invite by topic (such as type of health issue they work on, predominant role they perform, communities they work with, etc.).

Review and Assessment

Reinforcing Concepts (30 minutes)
Take half an hour to ask students questions from the day’s session. Possible review structures include: informally asking questions and waiting for students to raise their hands, forming a group competition, asking for written answers or asking students to ask each other questions.

Assessment (Optional)
Give students the activity Assessment 8.3: Note-Taking Assessment. You may assign this assessment as a take-home project or you can allot remaining class time.
**Service Learning**

This Service Learning activity will enhance skills learned in this module.

Learners will practice using documentation tools to record client interactions.

See the Service Learning manual for more detailed information to review with the class.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Service Learning activity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Documentation and Reporting</strong></td>
<td>• Practice writing at least five cases using placement organization’s tools for reporting.</td>
</tr>
<tr>
<td>• Document your work activities,</td>
<td>• Optional: Practice documentation throughout course (if unable to use organization’s tools for reporting).</td>
</tr>
<tr>
<td>including writing summaries</td>
<td><strong>Hours</strong> 8</td>
</tr>
<tr>
<td>of individual and community</td>
<td><strong>Assessment</strong> • Completion of five cases during Service Learning.</td>
</tr>
<tr>
<td>assessments accurately.</td>
<td></td>
</tr>
<tr>
<td>• Able to present information to</td>
<td></td>
</tr>
<tr>
<td>colleagues or organizational</td>
<td></td>
</tr>
<tr>
<td>partners while maintaining</td>
<td></td>
</tr>
<tr>
<td>confidentiality.</td>
<td></td>
</tr>
</tbody>
</table>

**Service Learning Activities**

*Practice writing cases using placement organization’s tools for reporting:*

- Ask your site for copies of their client reporting forms CHWs use. If they do not have forms or cannot give you access, please discuss with your trainer.
- Use these forms to complete five cases. These could be from shadowing CHWs and clients, sample cases or interviewing other CHWs. Complete the forms to the best of your ability and ask for guidance or assistance from individuals at your organization, if needed.

**Assessment — complete cases:**

- Please submit your five cases to your instructor. You will discuss when to submit the cases in class (for example, throughout the course or at the end of the course).
Documentation and Reporting

Additional Resources to Support CHWs in Clinical and Non-Clinical Settings

Exercise #1 Materials

Introduction

For this exercise, take a few minutes to read over the case study. After you have reviewed the case study, begin filling out the SOAP note.

Case Study

Adapted from the University of Wisconsin School of Social Work

Mrs. Johnson (Mrs. J.) is a 78-year-old, African American woman who lives in a small Midwestern city. About a year ago, her husband died suddenly of a stroke, leaving Mrs. J. to live alone in her home of 52 years. It was the home where she had raised her three children, all of whom graduated from college, have professional careers and now live in other parts of the state. Her family is a source of pride, and her home has numerous pictures of her children and grandchildren.

About three months ago, Mrs. J.’s oldest daughter, Vanessa, got a call from one of the neighbors. Vanessa lives a four-hour drive from her mother — a drive that can often be longer in bad weather. The neighbor stated that Mrs. J. had walked to the neighborhood store in her pajamas and slippers. Because Mrs. J. has lived in the community for several years, people have been watching out for her since her husband died, and someone gave her a ride back home. Mrs. J. doesn’t drive, and the temperature was fairly chilly that day.

As a result of the call, Vanessa went to Mrs. J.’s home for a visit. Although she and her siblings had been calling Mrs. J. regularly, no one had been to the family home in about seven months. Vanessa was shocked at what she saw. Mrs. J. had been a cook in a school cafeteria earlier in life and always kept her own kitchen spotless. But now the house was in disarray with several dirty pots and pans scattered throughout different rooms. In addition, odd things were in the refrigerator such as a light bulb and several pieces of mail. Many of the food products were out of date, and there was a foul smell in the kitchen. Trash covered the counters and floor.

Vanessa contacted her siblings to ask them if their mother had told any of them that she wasn’t feeling well. Her brother, Anthony, remarked that their mother would often talk about Mr. J. in the present tense — but he thought that it was just her grief about his death. The younger brother, Darius, reported that his wife was typically the one who called their mother—about once a month. He didn’t know if there had been any problems — his wife never said anything about it to him. Vanessa also contacted the pastor of her church, Rev. M. He stated that Mrs. J. had been walking to church on Sundays, as usual, but he did notice that she left early a few times and other times seemed to come to service late. But like the brother, Anthony, he thought that this behavior was probably a grief reaction to the loss of her husband.

A final shock to Vanessa was when she went through her mother’s mail. There were several overdue bills and one urgent notice that the electricity was going to be cut off if the balance wasn’t paid. She owed several hundred dollars in past due heating, electric and telephone bills.

Vanessa contacted her mother’s primary care physician (Dr. P.) who said that he had last seen Mrs. J. for her regular checkup six months earlier and that she had missed her last appointment a week ago. Dr. P. said that her staff had called to make another appointment, but that her mother hadn’t called them back yet. Mrs. J. is being treated with medication for arthritis, hypertension and gastroesophageal reflux
(GERD). Her weight was stable, and her only complaint was some difficulty staying asleep at night. Dr. P. reported that her mother’s mood was sad but had improved some in the month before the last visit. The doctor asked about memory and concentration, but her mother denied having any problems with memory.

Imagine that you are a case manager at the local Senior Coalition. Vanessa is calling you to seek advice about what to do. She would like you to do an assessment to help her determine what is wrong and how she can best help her mother.

Practice Writing a SOAP Note

**S**

**Subjective data:**
What is the person experiencing or feeling, how long has it been a problem, what is the frequency, intensity, duration?

**O**

**Objective data:**
Your description of the client’s status (such as psychological, health status), description of body language and affect.

**A**

**Assessment:**
Assessment of situation, session, ad client.

**P**

**Plan:**
What interventions could be done, what is the follow up, when will you see the person again?

Questions to Consider

Now that you have filled out the SOAP note, think about and answer the following questions. Once you are finished, please discuss your answers with a partner.

- What additional information would you need to complete the SOAP note?
- How might you share the information you gathered for the SOAP note with a supervisor or clinician?
- Was there anything challenging about using the SOAP note?
- What did you like about the SOAP note?
Exercise #2 Materials

Introduction

The purpose of this exercise is to provide an example of one of the tools we discussed as part of the presentation today. For this exercise, please review the case study presented in Exercise #1 (or partner up and role play) and complete the CHW form.

CHW Form

Please see the form created by Intercultural Mutual Assistance Association on page 56-57, and provide each student with a copy of this form to practice.
# Ordering Information

<table>
<thead>
<tr>
<th>Provider Name</th>
<th>Referral Area</th>
<th>Diagnosis</th>
</tr>
</thead>
</table>

# Patient Information

<table>
<thead>
<tr>
<th>Service Date (dd-Mmm-yyyy)</th>
<th>Visit Number</th>
<th>Family Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Street Address</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>State MN</td>
<td>ZIP Code</td>
</tr>
<tr>
<td>Insurance</td>
<td>Insurance Number</td>
<td>Phone</td>
</tr>
<tr>
<td>Language(s)</td>
<td>Interpreter</td>
<td></td>
</tr>
</tbody>
</table>

# Referral Request


# Visit Summary


# Patient States Goals as


# CHW Recommendations


### Ordered: Self-Management Education and Training

<table>
<thead>
<tr>
<th>Option</th>
<th>Start Time (hh:mm)</th>
<th>End Time (hh:mm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group of 2-4 Patients</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group of 5-8 Patients</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(30 minute units; 2 hours/day or 12 hours/month maximum)

### Health Education Information Provided

- [ ] Behavioral Health
- [ ] Asthma
- [ ] Child and Teen Check Program (C&TC)
- [ ] Oral Health
- [ ] Diabetes
- [ ] Heart Health
- [ ] Cancer
- [ ] Nutrition
- [ ] Medication Management
- [ ] Other

### Additional Patient Self-management Supports

(Community Health Worker assists family in self-management care)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date Initiated</th>
<th>Date Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applying for Insurance</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enrolling in a Health Care Plan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Insurance Renewal Activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Choosing a Primary Care Provider</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Understanding Insurance Coverage and Responsibilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Working with Health Care Teams (who to call, what to bring, where to go)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Refilling Prescriptions/Using the Pharmacy Help Line</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activity</th>
<th>Date Appt Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduling an appointment: Medical</td>
<td></td>
</tr>
<tr>
<td>Dental</td>
<td></td>
</tr>
<tr>
<td>Behavioral Health</td>
<td></td>
</tr>
<tr>
<td>Accessing Transportation for appointments: Medical</td>
<td></td>
</tr>
<tr>
<td>Dental</td>
<td></td>
</tr>
<tr>
<td>Behavioral Health</td>
<td></td>
</tr>
<tr>
<td>Accessing Language Services for appointments</td>
<td></td>
</tr>
<tr>
<td>Other:</td>
<td></td>
</tr>
</tbody>
</table>

### Self-management skill acquired:

- [ ] Face Time  
  - Start Time (hh:mm) (24 hour clock)  
  - End Time (hh:mm) (24 hour clock)

- [ ] Education Time  
  - Start Time (hh:mm) (24 hour clock)  
  - End Time (hh:mm) (24 hour clock)

- [ ] Total Time (Direct and Indirect)

### Community Health Worker Signature

- [ ] Date (dd-Mmm-yyyy)  
  - Time (hh:mm) (24 hour clock)

- [ ] Community Health Worker Printed Name
When you have completed the CHW Form, please answer the following questions. Once you are finished, please discuss your answers with a partner.

• What additional information would you need to complete this form?

• How might you share the information you gathered with a supervisor or clinician?

• Was there anything challenging about using this form?

• What did you like about the form in comparison to other tools?
Exercise #3 Materials

Introduction

For this take-home exercise, please review the Asthma Field Evaluation Tool in your home and answer the questions below.

Field Evaluation Tool

Please see the asthma home visiting tool from Centers for Disease Control and Prevention (CDC) and provide one to each student to take home.

The full tool is available from: www.epa.gov/asthma/asthma-home-environment-checklist.

When you have filled out the Asthma Field Evaluation Tool, think about and answer the following questions. Once you are finished, please discuss your answers with a partner.

• What was it like to use this check list in your home?

• Was there anything challenging about using this checklist?

• What did you like about this checklist?

• What do you think it would be like to use this checklist with a client?

• How would you introduce this checklist?
Exercise #4 Materials

Introduction

For this exercise, please review the case study presented in exercise #1 (or partner up and role play) and complete the CHW Documentation Procedure on the following pages.
Department Policy and Procedure

Department Name: Care Coordination

Policy/Procedure Name: CHW Documentation Procedure

Effective Date: 05/05/14  Revised Date(s): 02/01/17, 9/29/17, 01/26/18, 05/04/19, 2/3/20

Policy and/or Procedure: Procedure

General Guidelines

- Document every encounter or attempted interaction with a client or on behalf of the client (direct and indirect*) in Care Coordination EMR. This includes an encounter for enrollment and discharge notes.
- Log applicable travel time on every encounter.
- If you accompanied a CHW during a home visit, create an encounter to reflect time spent and reason of visit. Additionally, if encounter is billable, CHW will need to select the right peers grant. For billable encounters travel time needs to be added to the encounter time and also listed separately.
- If you are onsite at a hospital or clinic with an EMR, you will document the following in their system – outcome of the referral you received, enrollment note, and discharge note.
- Documentation must occur within 48 hours of the encounter.
- You must contact your clients at a minimum of every two weeks during the first six months of enrollment. After 6 months of enrollment, you must contact you clients at least once a month.
- Every note that goes into a partner EMR should include your signature, title, and cellphone number.
- If client is re-enrolled in program, add new enrollment with new date on enrollment note section above original enrollment note. Add new discharge with new date on discharge note section above original discharge note.

Documentation Types – Quick Note, Enrollment Note and Discharge Note

Quick Note

-When to use: Any encounter outside of an enrollment or discharge note.
-What to include: What was the plan (what was the purpose of the encounter), what intervention occurred (what did you discuss or accomplish), and what is the follow up (next steps).

Plan - CHW met at the client’s home to fill out a Medicaid application.

Intervention - CHW and client filled out Medicaid application and faxed it into the Medicaid office. Client needs to collect a copy of his medical records and bank statements to send to Medicaid.

Follow-Up - Client will collect his medical records and bank statements and call CHW in one week to set up another meeting time. CHW and client will fax those documents in at that time.
Department Policy and Procedure

*Exceptions to this are when you didn’t reach the party you were attempting to call. You would only note the plan (who you were attempting to contact and why) as well as the follow-up plan.

Example - CHW called client to discuss the outcome of his medical visit. Client did not answer. CHW left a message. CHW will call client back in two days.

Enrollment Note (Enrollment note might be slightly different according to specifics of each of the programs)

- **When to use:** When a client is enrolled into the program.
- **What to include:** Client's history, list the care plan items you will be working on, and then the follow up plan for next steps with pt EX: CHW will contact pt in two weeks to verify ___ was accomplished.

<table>
<thead>
<tr>
<th>Enrollment Note Template:</th>
<th>Example of Enrollment Note:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SUMMARY:</strong></td>
<td>SUMMARY: Community Health Worker (CHW) met with Cl and assessed needs. Cl sees a therapist at KC CARE Clinic but has not seen a physician in a long time. Cl wants help filling out her Medicaid application and help appealing her disability application. CHW enrolled Cl into program on 5/12/17 and discussed 3 different objectives they will work on.</td>
</tr>
<tr>
<td>CHW met with Cl and assessed needs.... <em>(this is the summary of that assessment/details of this encounter)</em></td>
<td></td>
</tr>
<tr>
<td><strong>CARE PLAN ITEMS:</strong></td>
<td><strong>CARE PLAN ITEMS:</strong></td>
</tr>
<tr>
<td>1. Description of Care Plan Item 1</td>
<td>1. Link Cl to KC CARE’s legal aid consultant</td>
</tr>
<tr>
<td>2. Description of Care Plan Item 2</td>
<td>2. Link Cl to a Health Navigator to help fill out her Medicaid application</td>
</tr>
<tr>
<td>3. Description of Care Plan Item 3</td>
<td>3. Link Cl to KC CARE Clinic for PCP and to receive a Well Women's Exam</td>
</tr>
<tr>
<td><strong>FOLLOW UP FOR CARE PLAN ITEMS:</strong> <em>(this is the summary of next steps)</em></td>
<td><strong>FOLLOW UP FOR CARE PLAN ITEMS:</strong></td>
</tr>
<tr>
<td>CHW Name</td>
<td>CHW will call Cl in a week to follow up and see if Cl connected with Legal Aid and Navigator. CHW will schedule Cl appt on 5/13/17 at KC CARE</td>
</tr>
<tr>
<td>Title</td>
<td></td>
</tr>
<tr>
<td>Cell Phone</td>
<td></td>
</tr>
<tr>
<td>CHW Name and Last Name</td>
<td>CHW Name and Last Name</td>
</tr>
<tr>
<td>Community Health Worker</td>
<td>Community Health Worker</td>
</tr>
<tr>
<td>816-999-9999</td>
<td>816-999-9999</td>
</tr>
</tbody>
</table>
Department Policy and Procedure

Discharge Note (Discharge note might be slightly different according to specifics of each of the programs)

- **When to use** – When a patient is discharged from the program.
- **What to include** – Discharge note – summarize the work done with the patient during the time they were enrolled in the program

<table>
<thead>
<tr>
<th>Discharge Note Template</th>
<th>Discharge Note Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHW was enrolled in the program from _______ to __________. CHW and patient accomplished the following Care Plan items:</td>
<td>CHW was enrolled in the program from 4/11/17 to 8/27/17. CHW and patient accomplished the following Care Plan items:</td>
</tr>
<tr>
<td>1.</td>
<td>1. Food stamps application</td>
</tr>
<tr>
<td>2.</td>
<td>2. Medicaid application</td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>CI was discharged from the program because ______________.</td>
<td>CI was discharged from the program because he completed all items and did not have further needs. CHW let CI know to call if new needs arise.</td>
</tr>
</tbody>
</table>

**CHW Name**
**Title**
**Cell Phone**

**CHW Name and Last Name**
Community Health Worker
816-999-9999

Other required documentation:

**Care Plan description** – this outlines the steps you will take with a patient to reach their goals. This will follow the WH- format.

Wh- questions are:
- **What are they going to work on?**
  CHW and patient will get appointment scheduled at KC CARE Health Center.

- **Who is going to be doing what?**
  CHW will provide contact information of the clinic and requirements to get enrolled and schedule appointment. Pt will call clinic, schedule apt. and call CHW to let them know. CHW will attend apt with patient.

- **When is this goal going to be completed?**
  Goal will be completed once patient attends appointment and has fully understanding on how to schedule and lead apt. Patient will need to see provider within one month.
Department Policy and Procedure

- Where are they going to accomplish it?
  KC CARE Health Center

- Why is this goal important for you?
  Patient has diabetes and without seeing a provider won’t be able to get the medication to feel better.

  *Indirect- calling agencies, scheduling appointments, researching resources, etc.
When you have completed this form, please think about the following questions. Please feel free to discuss with a partner.

- How might an employer use this form?

- Was there anything challenging about using this form?

- What did you like about the form in comparison to other tools?
Bonus Materials: Translating Medical Terms

These materials were adapted from resources provided by the Alaska Department of Health and Human Services. The original materials were designed for EMTs.

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>a</td>
<td>Before</td>
</tr>
<tr>
<td>AED</td>
<td>Automated External Defibrillator</td>
</tr>
<tr>
<td>a.c.</td>
<td>Before meals</td>
</tr>
<tr>
<td>ASA</td>
<td>Aspirin</td>
</tr>
<tr>
<td>AMA</td>
<td>Against medical advice</td>
</tr>
<tr>
<td>AMI</td>
<td>Acute myocardial infarction</td>
</tr>
<tr>
<td>ASHD</td>
<td>Arteriosclerotic heart disease</td>
</tr>
<tr>
<td>b.i.d.</td>
<td>Twice a day</td>
</tr>
<tr>
<td>BP</td>
<td>Blood pressure</td>
</tr>
<tr>
<td>BS</td>
<td>Breath sounds, bowel sounds, or blood sugar</td>
</tr>
<tr>
<td>BVM</td>
<td>Bag-valve-mask</td>
</tr>
<tr>
<td>c/o</td>
<td>Complaining of</td>
</tr>
<tr>
<td>Ca</td>
<td>Cancer/carcinoma</td>
</tr>
<tr>
<td>cc</td>
<td>Cubic centimeter</td>
</tr>
<tr>
<td>CC</td>
<td>Chief Complaint</td>
</tr>
<tr>
<td>CHF</td>
<td>Congestive heart failure</td>
</tr>
<tr>
<td>CO</td>
<td>Carbon monoxide</td>
</tr>
<tr>
<td>COPD</td>
<td>Chronic obstructive pulmonary disease (emphysema, chronic bronchitis)</td>
</tr>
<tr>
<td>CPR</td>
<td>Cardiopulmonary resuscitation</td>
</tr>
<tr>
<td>CSF</td>
<td>Cerebrospinal fluid</td>
</tr>
<tr>
<td>CVA</td>
<td>Cerebrovascular accident</td>
</tr>
<tr>
<td>CXR</td>
<td>Chest X-ray</td>
</tr>
<tr>
<td>d/c</td>
<td>Discontinue</td>
</tr>
<tr>
<td>DM</td>
<td>Diabetes mellitus</td>
</tr>
<tr>
<td>DOA</td>
<td>Dead on arrival</td>
</tr>
<tr>
<td>DOB</td>
<td>Date of birth</td>
</tr>
<tr>
<td>Dx</td>
<td>Diagnosis</td>
</tr>
<tr>
<td>ECG, EKG</td>
<td>Electrocardiogram</td>
</tr>
<tr>
<td>e.g.</td>
<td>For example</td>
</tr>
<tr>
<td>ETA</td>
<td>Estimated time of arrival</td>
</tr>
<tr>
<td>ETOH</td>
<td>Alcohol (ethanol)</td>
</tr>
<tr>
<td>Fx</td>
<td>Fracture</td>
</tr>
<tr>
<td>GI</td>
<td>Gastrointestinal</td>
</tr>
<tr>
<td>GSW</td>
<td>Gunshot wound</td>
</tr>
<tr>
<td>gtt.</td>
<td>Drop</td>
</tr>
<tr>
<td>GU</td>
<td>Genitourinary</td>
</tr>
<tr>
<td>GYN</td>
<td>Gynecologic</td>
</tr>
<tr>
<td>h, hr.</td>
<td>Hour</td>
</tr>
<tr>
<td>H/A</td>
<td>Headache</td>
</tr>
<tr>
<td>HEENT</td>
<td>Head, ears, eyes, nose, throat</td>
</tr>
<tr>
<td>Hg</td>
<td>Mercury</td>
</tr>
<tr>
<td>h/o</td>
<td>History of</td>
</tr>
<tr>
<td>hs</td>
<td>At bedtime</td>
</tr>
<tr>
<td>HTN</td>
<td>Hypertension</td>
</tr>
<tr>
<td>Hx</td>
<td>History</td>
</tr>
<tr>
<td>ICP</td>
<td>Intracranial pressure</td>
</tr>
<tr>
<td>ICU</td>
<td>Intensive Care Unit</td>
</tr>
<tr>
<td>IM</td>
<td>Intramuscular</td>
</tr>
<tr>
<td>IO</td>
<td>Intraosseous</td>
</tr>
<tr>
<td>JVD</td>
<td>Jugular venous distension</td>
</tr>
<tr>
<td>KVO</td>
<td>Keep vein open</td>
</tr>
<tr>
<td>L</td>
<td>Left or Liter</td>
</tr>
<tr>
<td>LAC</td>
<td>Laceration</td>
</tr>
<tr>
<td>LOC</td>
<td>Level of consciousness</td>
</tr>
<tr>
<td>LR</td>
<td>Lactated Ringers solution</td>
</tr>
<tr>
<td>mcg</td>
<td>Micrograms</td>
</tr>
<tr>
<td>MS</td>
<td>Morphine sulphate, multiple sclerosis</td>
</tr>
<tr>
<td>NAD</td>
<td>No apparent distress</td>
</tr>
<tr>
<td>NC</td>
<td>Nasal cannula</td>
</tr>
<tr>
<td>NKA</td>
<td>No known allergies</td>
</tr>
<tr>
<td>npo</td>
<td>Nothing by mouth</td>
</tr>
<tr>
<td>NRB</td>
<td>Non-rebreather mask</td>
</tr>
<tr>
<td>NS</td>
<td>Normal saline</td>
</tr>
<tr>
<td>NSR</td>
<td>Normal sinus rhythm</td>
</tr>
</tbody>
</table>
For fun, you may want to translate this report from “medicine” into English:

67 y/o male c/o chest pain and SOB x 2 h. Pain is severe (8 out of 10), centered under sternum, and radiates to the L arm and jaw. Pain woke patient from sleep, and is w/o D with movement or breathing. Pt. has a h/o ASHD, MI 1/15/01, HTN, and DM. Meds include ASA, insulin, lasix, and lisinopril. Allergic to PCN.

On exam pt is A+O x 4, diaphoretic, and anxious.

HEENT: PERL

Neck: – JVD, positive use of accessory muscles

Chest: BS crackles at bases, + retractions

Abdomen: soft, non-tender

Extremities: ¾ edema/clubbing/cyanosis

Assessment: r/o chest pain of cardiac origin

Plan: oxygen (15L NRB), IV NS TKO, cardiac monitor, monitor V.S., transport position of comfort, NTG x 3 and MS 2 mg IV with decrease in pain from an 8 to a 3, ASA deferred as patient had a dose today.
Additional Documentation Examples

Bi-Weekly Report

Clinic Name: ______________________________________________________________________

End Date: ____________________

# of Referrals: __________________________________________________________

# of Home Visits: _________________________________________________________

# of Applications (disability, ACA, SNAP, Medicaid) completed: _______________

# of Patient Education: _____________________________________________________

# of Daily Reminder Calls: __________________________________________________

# of Patients Helped with Medication Assistance: _____________________________

# of Confirmed Phone Call: ________________________________________________

# of Outreach Events Attended: ______________________________________________

# of Community Classes Taught: _____________________________________________

# of Patients Asked to Sign up for Portal: _____________________________________

# of Patients Signed up for Portal: ___________________________________________

# of Patients Assisted with Portal: _____________________________________________

# of Follow-up Letters Sent: ________________________________________________

Once you have completed this form, please think about the following questions. Please feel free to discuss with a partner.

- How might an employer use this form?
- Was there anything challenging about using this form?
- What did you like about the form in comparison to other tools?
Additional Case Study Examples

Case Study #1

Adapted from Fordham University Graduate School of Social Work

Mr. and Mrs. Sanchez, aged 77 and 68 respectively, have been raising their two grandchildren for the past five years. Maria (age 10) and Tony (13) were orphaned five years ago when their parents (the Sanchez's daughter and her husband) were killed in an automobile accident. The children's father was driving home with his wife from a party where he had been drinking heavily. Neither of the Sanchez's two other children were in a position to take on parenting responsibilities. Mr. Sanchez is retired from a position with the post office. Mrs. Sanchez supplemented their income by cleaning apartments.

Approximately two months ago, Mr. Sanchez suffered a stroke, which left him with considerable impairment. He has been admitted to a rehab facility, where he is progressing well, and the expectation is that he will be returning home. He currently has some speech impairment and is partially paralyzed on one side. It is not clear how fully he will recover, but the expectation is that there will be some residual impairment. It is also unclear how he will be able to manage as the home has two stories, and the only bathroom is on the second floor.

Prior to Mr. Sanchez's stroke, Tony was beginning to get into trouble at school. This took the form of "sassing" his teachers and failing to do his homework assignments. Last week, Tony assaulted another student and was therefore temporarily suspended from school. Maria, always a quiet child, has presented no problems at school, although her teachers have noticed that she now spends more time by herself.

Mrs. Sanchez initially was able to handle things with the same determination and task-oriented focus that she used to deal with the loss of her daughter and transition to the "parent" role for her grandchildren. However, Tony's suspension from school has taxed her beyond her ability to cope. Mrs. Sanchez has become weepy, unable to focus, and unable to make decisions. She has had difficulty explaining to Tony and Maria what is happening to their grandfather. She has not told Mr. Sanchez about Tony's suspension.

Mrs. Sanchez is called to attend a meeting with the school principal and social worker. When the social worker asks Mrs. Sanchez if she could give them any insight into why Tony has become so aggressive, she bursts into tears.
Case Study #2

Esyllt is 2½ years old and is due to have her routine health checkup with the family Health Visitor, Karen, at home. This is the third time that Esyllt and her mother have been seen by Karen. Esyllt speaks Welsh at home with her mother and father. Karen arrives and gets out some colored wooden blocks, a measuring tape and her notes to document things. Karen and the mum chat in English about how things are in general, any concerns about Esyllt, and are there any questions? Mum mentions that Esyllt still doesn’t have many words in her vocabulary and seems to struggle with certain sounds. Karen suggests that Esyllt may need to be referred to a speech therapist. Mum asks if they can see someone who speaks Welsh to assess Esyllt as the therapist wouldn’t know what was being mispronounced if she didn’t speak Welsh. Karen replies that this is not possible at the moment, but it would probably be OK in English anyway. Mum refused to have Esyllt referred and says she will consider it again in six months if there still hasn’t been any improvement. The consultation continues. Karen wants Esyllt to pick up the blocks in the order of color she asks for. Karen says: “Can I have the red one please”? Mum repeats — “Gallu di roi yr un coch iddi?” Esyllt responds accurately. This continues until the exercise is complete. Karen leaves stating she will be back for the preschool checkup and to get in touch if there are any further concerns.
Module 9: Professionalism and Conduct

Outline

Guiding Principles
  Review
    Lecture: Guiding Principles
    Group Activity — Activity 7.1: Ethics and Boundaries
    or Activity 7.2: Scope of Practice

Professional Skills
  Lecture: Professional Skills
  Group Activities — Select TWO of the
  Chapter 14 Activities

Stress Management and Self-Care
  Lecture: Stress Management
  Group Activity — Any of the Chapter 12 Activities

Review and Assessment

Service Learning

Trainer Preparation:
- Read Chapters 7.1, 7.2, 7.4, 12 and 14.
- Read through instructions and handouts for in-class activities.
- Prepare materials needed for activities.

Learner Preparation:
- Read Chapters 7.1, 7.2, 7.4, 12 and 14.
- Complete any assigned assessments and Service Learning activities/reflections.

Timing (Total — 4 hours):
- Lecture — 2 hours, 15 minutes.
- Activities — 4 hours, 15 minutes.
- Other — 1 hour.
- Breaks — 30 minutes (break times are not written in, use your discretion).
- Service learning focused on understanding workplace ethics and boundaries — 2 hours.

Materials:
- Copies of handouts and materials for chosen activities. This module has room for variation in activities and assessments, so refer to each activity for the materials and handouts needed.

Learning Objectives:
After this session, participants will be able to:

- Chapter 7:
  - Define ethics and explain how ethics are different from laws.
  - Discuss key articles from the CHW Code of Ethics.
  - Explain ethical guidelines relating to informed consent and confidentiality.
  - Apply the Framework for Ethical Decision Making to resolve ethical questions.
  - Define and discuss professional boundaries and dual or multiple relationships.
  - Explain how CHWs may cross professional boundaries, and the potential risks of doing so.
  - Explain self-disclosure and analyze the potential risks and benefits for clients and CHWs.
  - Define scope of practice.
  - Identify competencies that may lie within and outside the CHW scope of practice.
  - Explain how to respond when confronted with a challenge regarding your scope of practice.
- Chapter 14:
  - Discuss the meaning and challenge of code switching.
  - Develop a professional resume.
  - Prepare for a job interview.
  - Identify dress codes at your internship site or workplace.
  - Discuss the challenge of establishing healthy professional boundaries and making sound choices regarding disclosure of personal information.
  - Apply time management skills to your life, study and work.

- Chapter 12:
  - Define stress and burnout.
  - Recognize common sources of stress (stressors) and stress responses.
  - Assess personal signs of stress.
  - Better manage your stress and prevent burnout.
  - Develop an action plan for self-care.
  - Support a client with stress-reduction planning.

Guiding Principles

2 hours, 30 minutes

Learning Objectives:

- Define ethics and explain how ethics are different from laws.
- Discuss key articles from the CHW Code of Ethics.
- Explain ethical guidelines relating to informed consent and confidentiality.
- Apply the Framework for Ethical Decision Making to resolve ethical questions.
- Define and discuss professional boundaries and dual or multiple relationships.
- Explain how CHWs may cross professional boundaries, and the potential risks of doing so.
- Explain self-disclosure and analyze the potential risks and benefits for clients and CHWs.
- Define scope of practice.
- Identify competencies that may lie within and outside the CHW scope of practice.
- Explain how to respond when confronted with a challenge regarding your scope of practice.

Words to Know

- **Boundary crossing**: when a CHW deviates from a strictly professional role.
- **Confidentiality**: protection for a client’s communication with a CHW; an essential component for establishing a trusting and productive professional relationship.
- **Dual or multiple relationships**: when you have another type of relationship or connection with someone who is also a client (neighbor, friend, etc.).
- **Ethics**: the “right conduct” or what to do when faced with a challenge or dilemma.
- **Informed consent**: The obligation to provide clients with the information they need in order to make a sound decision about whether or not to participate in a program, service or research study.
- **Professional boundaries**: limitations or ethical guidelines that define professional working relationships.
- **Self-disclosure**: when a CHW or another service provider reveals personal or private information about themselves to a client they are working with.
**Review** (30 minutes)
Start the class by reviewing what was covered in the last few class sessions. Ask for definitions of key vocabulary or concepts and see if anyone had new thoughts over the last week or made any new connections to the material. Review lessons learned from any assigned assessment and ask a few students to report back on their Service Learning activities.

**Lecture: Guiding Principles** (45 minutes)
Spend 45 minutes covering Ethics, Professional Boundaries and Scope of Practice from Chapter 7. You may choose to use the PowerPoint as a resource or follow the text book. Make sure to touch on and reinforce the following themes:
- Ethical Guidelines for CHWs (p. 158).
- Establishing and Maintaining Professional Boundaries (p. 168).
- Scope of Practice (p. 173).

**Group Activity** (75 minutes)
Lead students in either Activity 7.1: Ethics and Boundaries or Activity 7.2: Scope of Practice, deciding based on which topic is of more relevance and interest to your group of learners.

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**Professional Skills**
2 hours, 45 minutes

**Learning Objectives:**
- Discuss the meaning and challenge of code switching.
- Develop a professional resume.
- Prepare for a job interview.
- Identify dress codes at your internship site or workplace.
- Discuss the challenge of establishing healthy professional boundaries and making sound choices regarding disclosure of personal information.
- Apply time management skills to your life, study and work.
- Develop life and professional goals, including a plan for professional development.

**Words to Know**
- **Code switching:** moving between one or more sets of expectations and guidelines for conduct or behavior.
- **Resume:** a formal document listing your work experience and education.

**Lecture: Professional Skills** (45 minutes)
Spend 45 minutes lecturing on the professional skills covered in Chapter 12. Since the communication skills included in this chapter were covered in the communication model, we are skipping over them here, though you may choose to review them. You may use the PowerPoint to structure the lecture or instead use this guide and the text book. Make sure to cover the following themes:
- Code Switching (p. 370).
- Getting a Job (p. 372).
- Finding and Applying for Job Opportunities (p. 373).
- Interviewing for a Position (p. 377).
- Keeping the Job (p. 379).
- Dress Code (p. 379).
- Managing Your Time (p. 386).
- Professional Development and Career Advancement (p. 387).

**Group Activity** (120 minutes)
Choose TWO of the activities for Chapter 14. Decide based on the amount of time available and the interest of the students. Each activity will allow students to develop a key professional skill covered in this chapter.
Stress Management and Self-Care  

**1 hour, 45 minutes**

**Learning Objectives:**

- Define stress and burnout.
- Recognize common sources of stress (stressors) and stress responses.
- Assess personal signs of stress.
- Better manage your stress and prevent burnout.
- Develop an action plan for self-care.
- Support a client with stress reduction planning.

**Words to Know**

- **Burnout:** the point a person reaches when the demands made on her/him over an extended period of time are too great for the resources she or he possesses; an experience of personal fatigue, alienation and failure.
- **Stress:** the way we respond to and are affected by events or situations that place a demand on our internal and external resources.
- **Stressor:** an event or circumstance that places demands on us.
- **Post-traumatic stress:** a special kind of stress response that may occur when people are exposed to war, torture, child abuse, sexual assault, incarceration, natural disasters and other traumatic experiences characterized by intense fear, horror or a sense of helplessness.

**Lecture: Stress Management** (45 minutes)

Spend 45 minutes lecturing on Chapter 12 — Stress and Management. You may choose to use the PowerPoint to guide the lecture or you may use the textbook. Make sure to cover the following themes:

- Defining Stress and Burnout (p. 323).
- Internal and External Resources (p. 324).
- Stress Responses (p. 325).
- Assessing for Stress and Burnout (p. 330).
- Enhancing Stress Management Skills (p. 335).
- Self-Care (p. 337).
- Meditation Practice (p. 340).
- Working with Clients on Stress Reduction (p. 342).

**Group Activity** (60 minutes)

Lead the class through any of the activities for Chapter 12, depending on the interest of the class. Each will dig deeper into particular coping mechanism for stress and burnout.
**Review and Assessment**

**Reinforcing Concepts** (30 minutes)
Take half an hour to ask students questions from the day’s session. Possible review structures include: informally asking questions and waiting for students to raise their hands, forming a group competition, asking for written answers or asking students to ask each other questions.

**Assessment** (Optional)
Give students the activity Assessment 14.2: Reflective Writing on Professional Skills. You may assign this assessment as a take-home project or you can allot remaining class time.

**Service Learning**

This Service Learning activity will enhance skills learned in this module.
Learners will better understand ethics and boundaries at their worksite by discussing the topic with their supervisor and reviewing the workplace handbook.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Service Learning activity</th>
<th>Hours</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professionalism and Conduct</td>
<td>• Review ethics handbook at site.</td>
<td>2</td>
<td>• Reflection paper.</td>
</tr>
<tr>
<td>• Skills to handle ethical challenges, confidentiality and privacy rights.</td>
<td>• Interview CHW supervisor about professional boundaries.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Professional boundaries and working collaboratively in an organization.</td>
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<td></td>
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</tbody>
</table>

**Service Learning Activities:**

*Review ethics handbook at site:*

- Ask your supervisor for the ethics handbook at your worksite. Note that there may be multiple ethics handbooks, feel free to review additional handbooks to familiarize yourself with various policies and expectations.
- If there is not a specific ethics handbook available, ask your supervisor for information about the ethics training that is required for new employees.
- Review the materials that are related to ethics and take any notes that might be helpful in your reflection paper.

*Interview CHW supervisor about professional boundaries:*

- Ask your supervisor for a 30-minute meeting to discuss professional boundaries.
- Schedule the meeting and prepare by writing questions you have about professionalism and conduct. Some suggestions for topics include:
  - What are effective skills a CHW needs to be professional?
  - What are some issues you have seen in keeping professional boundaries with clients and how have you mitigated them?
  - Take notes during your meeting and use these in your reflection.
  - Reflection Paper: Professionalism and Conduct

- Once you have completed the review of the ethics handbook and interview with your supervisor, write a brief (one page) reflection of your experience in professionalism and conduct. Feel free to think about and include information you have learned from your course or examples from your own personal experiences.
Module 10: Public / Community Health Concepts and Approaches

Outline

Intro to Public Health
   Review
   Lecture: Intro to Public Health
   Group Activity 3.2: The Ecological Model of Health

Health for All
   Lecture: Health for All
   Group Activity 4.4: Case Study
   Group Activity 4.2: Promoting Health Justice
   CHW Panel Activity 1.3

Review and Assessment
Service Learning

Trainer Preparation:

- Invite presenters for CHW Panel (Activity 1.3).
- Read Chapters 3 and 4.
- Read through instructions and handouts for in-class activities.
- Prepare materials needed for activities.

Learner Preparation:

- Read Chapters 3 and 4.
- Complete any assigned assessments and Service Learning activities/reflections.

Timing (Total — 6 hours):

- Lecture — 1 hour, 30 minutes.
- Activities — 4 hours, 30 minutes.
- Other — 1 hour.
- Breaks — 30 minutes (break times are not written in, use your discretion).
- 4 hours of Service Learning that involves practicing goal planning with at least two clients.

Materials:

- Copies of handouts and materials for:
  - Activity 3.2
    - Copies of “Learner Handout 3.2 A: Ecological Model Diagram.”
    - Post-its and pens for each small group.

  - Activity 4.4
    - Copies of “Learner Handout 4.4 A: Case study, Black Infant Health Program.”

  - Activity 4.2
    - Post-it pads and pens.
    - Copies of “Learner Handout 4.2 A: The Ecological Model.”

  - Activity 1.3
    - Nametags and markers.

Learning Objectives:

After this session, participants will be able to:

- Chapter 3:
  - Define health and public health, and explain how the field of public health is different from the field of medicine.
  - Explain how the field of public health analyzes the causes of illness and health of populations and emphasizes the social determinants of health.
  - Explain why public health is concerned with health inequalities.
  - Discuss the relationship between promoting social justice and promoting public health.
  - Describe the ecological model of public health and apply it to specific public health issues.
• Discuss public health's emphasis on prevention.
• Explain the spectrum of prevention and provide examples for each of the six levels.
• Chapter 4:
  • Define health inequities.
  • Discuss and analyze the data that document health inequalities among populations.
  • Explain how social inequalities result in health inequalities.
  • Discuss how health inequalities are harmful to our society.
  • Describe and analyze how health inequalities are preventable.
  • Examine the role of CHWs in overcoming health inequalities and promoting social justice.
  • Apply these ideas to issues of health equality in your own community.

Intro to Public Health

Learning Objectives:

• Define health and public health and explain how the field of public health is different from the field of medicine.
• Explain how the field of public health analyzes the causes of illness and health of populations and emphasizes the social determinants of health.
• Explain why public health is concerned with health inequalities.
• Discuss the relationship between promoting social justice and promoting public health.
• Describe the ecological model of public health and apply it to specific public health issues.
• Discuss public health's emphasis on prevention.
• Explain the spectrum of prevention and provide examples for each of the six levels.

Words to Know

• **Chronic disease**: condition that lasts for at least three months (and may last for years or a lifetime).
• **Ecological model**: a model used to examine risk factors that lead to disease; they emphasize the social and physical environment and draw attention to the social determinants of health.
• **Environmental justice**: a movement that addresses the inequalities that result from concentrating pollution in certain neighborhoods and communities.
• **Epidemiology**: the study of the health and illness of populations.
• **Health co-benefit**: a positive side effect of policy that also improves the health of a population.
• **Infant mortality**: the estimated number of children, out of every 1,000 children born alive, who die before the age of one.
• **Infectious disease**: caused by a pathogen or infectious agent (such as a virus, bacteria or parasite) and can be passed from one person to another or between humans and animals.
• **Interdisciplinary**: taps into a wide range of science, social science and professional disciplines.
• **Life Expectancy**: the estimated number of years that people will live.
• **Prevalence**: the percentage of a population with a specific health condition.
• **Populations**: large groups of people usually defined by factors such as geography, demographics or health-related data.
• **Primary prevention**: preventing the development of a disease or other health condition from occurring before it starts.

• **Secondary prevention**: early diagnosis and treatment of illnesses or conditions before they become symptomatic or turn into something worse.

• **Social determinants of health**: economic, social, and political policies and dynamics that influence whether or not people have access to resources and opportunities essential to good health.

• **Spectrum of prevention**: a framework for understanding different “levels” of prevention activities.

• **Tertiary prevention**: services for those already living with illness or injury to delay further progression of disease, alleviate symptoms, prevent complications and delay death.

Review (30 minutes)
Start the class by reviewing what was covered in the last few class sessions. Ask for definitions of key vocabulary or concepts and see if anyone had new thoughts over the last week or made any new connections to the material. Review lessons learned from any assigned assessment and ask a few students to report back on their Service Learning activities.

Lecture: Intro to Public Health (45 minutes)
Spend 30 minutes covering the Basic Principles of Public Health, covered in Chapter 3. You may choose to use the PowerPoint as a resource or follow the text book. Make sure to touch on and reinforce the following themes:

- Defining Health (p. 64).
- Defining the Field of Public Health (p. 65).
- The Practice of Public Health (p. 71).

Group Activity (60 minutes)
Lead students in Activity 3.2: The Ecological Model of Health. This activity will reinforce the importance of social determinants of health in a hands-on activity.

Health for All 3 hours, 15 minutes

Learning Objectives:

• Define health inequities.
• Discuss and analyze the data that document health inequalities among populations.
• Explain how social inequalities result in health inequalities.
• Discuss how health inequalities are harmful to our society.
• Describe and analyze how health inequalities are preventable.
• Examine the role of CHWs in overcoming health inequalities and promoting social justice.
• Apply these ideas to issues of health equality in your own community.

Words to Know

• **Child mortality**: estimated number of children who die before the age of five out of every 100,000 live births.

• **Epigenetics**: how genes get turned on or off by exposures to chemicals, stress and other environmental factors.

• **Infant mortality**: the estimated number of children, out of every 1,000 children born alive, who die before the age of one.

• **Life expectancy**: average number of years that a population is expected to live from birth.
• **Maternal mortality**: the estimated number of women who die as a result of pregnancy or childbirth per 100,000 live births.

• **Morbidity**: the rate of illness or disability.

• **Redlining**: a form of discrimination in financial services and home ownership.

• **Social gradient**: a slope or a ladder where for each step you go up or down in social status, there is a corresponding change in health.

**Lecture: Health for All** (45 minutes)
Take 45 minutes to lecture on Health Equity and Social Determinants of Health, as covered in Chapter 4. You may choose to use the PowerPoint to guide the lecture or instead use this guide and the textbook. Make sure to cover the following themes:

- Defining Health Inequality (p. 84).
- Evidence of Health Inequalities (p. 85).
- Awareness of Health Inequalities as a Catalyst for Change (p. 90).
- Social Determinants of Health (p. 91).
- Overcoming Health Inequalities (p. 96).
- The Role of CHWs (p. 102).

**Group Activity** (45 minutes)
Guide students through Activity 4.2: Promoting Health Justice. During this activity, students will brainstorm ideas to promote health equity.

**Guest Presenters** (90 minutes)
Organize a CHW Panel based on the guidelines provided in Activity 1.3: CHW Panel — Experts in the Field. Introducing students to individuals already working as CHWs will help them conceptualize the CHW role and start to build their professional network. This activity is found in multiple modules throughout this training, so consider grouping the CHWs you invite by topic (such as type of health issue they work on, predominant role they perform, communities they work with, etc.).

**Review and Assessment** (30 minutes)

**Reinforcing Concepts** (30 minutes)
Take half an hour to ask students questions from the day’s session. Possible review structures include: informally asking questions and waiting for students to raise their hands, forming a group competition, asking for written answers or asking students to ask each other questions.

**Assessment** (Optional)
Give students the Assessment 4.1: Developing a Community Poster. This assignment works best as a take-home project.
Service Learning

2 hours

This Service Learning activity will enhance skills learned in this module.

Learners will practice goal setting with at least two clients after preparing with their supervisor.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Service Learning activity</th>
<th>Hours</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use of Public Health/Community Health Concepts and Approaches</td>
<td>Practice goal planning with at least two clients.</td>
<td>2</td>
<td>Completion of two goal planning worksheets</td>
</tr>
</tbody>
</table>

Service Learning Activities

**Practice goal planning with clients:**

- Discuss the process of goal planning with your site supervisor or CHW at the organization. Learn more about their typical goal-planning process. If possible, review their existing goal-planning materials.
- Use either the site goal planning or the goal-planning worksheet in this handbook to practice goal planning with at least two clients. Try to use some of the skills you have developed in the course to date. For example, use some of the motivational interviewing techniques. If you are not able to access clients to practice goal planning, consider practicing with another CHW in your class or a family member.

**Service Learning Assessment:**

- Please submit your goal planning materials to your instructor at the agreed upon deadline.

**Goal Planning Worksheets (one for each client).**

- This worksheet uses concepts of motivational interviewing. You will discuss this during the course. Please reach out to your instructor if you’d like to learn more.
- Remember, motivational interviewing is a process designed to help people commit to difficult processes of change. There are two key goals for this process: increase the person’s motivation and to have the person make a commitment to change.
Module 11: Individual Assessment

Outline

Conducting Initial Client Interviews
Review
Group Activity 8.1: Case Study: Overview of an Initial Interview
Lecture: Client Interviews
Group Activity 8.4: Practicing a Strength-Based Approach to Interviewing
Client-Centered Counseling for Behavior Change
Lecture: Client-Centered Counseling for Behavior Change
Group Activities: Chose two from Chapter 9
Review and Assessment
Service Learning

Trainer Preparation:

- Read Chapter 8 and Chapter 9.
- Read through instructions and handouts for in-class activities.
- Prepare materials needed for activities.

Learner Preparation:

- Read Chapter 8 and Chapter 9.
- Complete any assigned assessments and Service Learning activities/reflections.

Timing (Total — 8 hours):

- Lecture — 1 hour, 45 minutes.
- Activities — 4 hours, 40 minutes.
- Other — 50 minutes.
- Breaks — 45 minutes (break times are not written in, use your discretion).
- Service learning that allows learners to practice doing individual assessments — 4 hours.

Materials:

- Copies of handouts and materials for:
  - Activity 8.1
    - Copies of “Learner Handout 8.1 A: Case Study of Arnold Winters.”
  - Activity 8.4
    - Copies of “Learner Handout 8.4 A: Form for Strength-Based Assessment.”
  - Two activities of your choice from Chapter 9.

Learning Objectives:

After this session, participants will be able to:

- Chapter 8:
  - Describe the types of initial client interviews that CHWs are likely to conduct.
  - Explain confidentiality policies to a client.
  - Demonstrate how to obtain informed consent for an interview.
  - Conduct a client-centered interview, including the use of open and closed-ended questions.
  - Explain the value of the strength-based approach and demonstrate how to conduct a strength-based assessment.
  - Close an initial interview effectively.

- Chapter 9:
  - Define client-centered counseling and the types of providers who use it.
• Discuss client-centered counseling concepts, skill and resources, including the stages of change theory, action planning and harm reduction.
• Explain key concepts and techniques for motivational interviewing.
• Identify common challenges to providing client-centered counseling.

• Evaluate your own performance in providing client-centered counseling.
• Develop your own professional development plan to enhance your counseling knowledge and skills.

Conducting Initial Client Interviews 3 hours, 15 minutes

Learning Objectives:
• Describe the types of initial client interviews that CHWs are likely to conduct.
• Explain confidentiality policies to a client.
• Demonstrate how to obtain informed consent for an interview.
• Conduct a client-centered interview, including the use of open and closed-ended questions.
• Explain the value of the strength-based approach and demonstrate how to conduct a strength-based assessment.
• Close an initial interview effectively.

Words to Know
• **Body language**: messages conveyed by facial expressions, how we hold our body, eye contact, etc.
• **Closed-ended questions**: questions that can be answered with few words, like yes or no.
• **Open-ended questions**: questions that invite someone to respond with more than one word.

Review (20 minutes)
Start the class by reviewing what was covered in the last few class sessions. Ask for definitions of key vocabulary or concepts and see if anyone had new thoughts over the last week or made any new connections to the material. Review lessons learned from any assigned assessment and ask a few students to report back on their Service Learning activities.

Group Activity (75 minutes)
Guide students through Activity 8.1: Case Study: Overview of an Initial Interview. This activity acts as a review of Chapter 8 and, thus, if students did not read the chapter well before class, you should skip the activity and instead spend more time on the lecture.

Lecture: Client Interviews (45 minutes)
Spend 45 minutes solidifying the concepts covered in Chapter 8 and in the previous activity. Section 8.5 on documentation was covered in the documentation module, so it is left out here — you may decide to go over it again with the class if it is relevant. Make sure to cover the following themes, either using this guide or the PowerPoint:
• An Overview of Initial Client Interviews (p. 201).
• The Beginning of the Interview (p. 204).
• The Middle of the Interview (p. 209).
• The End of the Interview Process (p. 217).

Group Activity (55 minutes)
Lead students in Activity 8.4: Practicing a Strength-Based Approach to Interviewing. This activity allows learners to role-play a client interview and practice their assessment of a client’s strengths.
Client-Centered Counseling for Behavior Change  3 hours, 30 minutes

Learning Objectives:

- Define client-centered counseling and the types of providers who use it.
- Discuss client-centered counseling concepts, skill and resources, including the stages of change theory, action planning and harm reduction.
- Explain key concepts and techniques for motivational interviewing.
- Identify common challenges to providing client-centered counseling.
- Evaluate your own performance in providing client-centered counseling.
- Develop your own professional development plan to enhance your counseling knowledge and skills.

Words to Know

- **Ambivalence**: contradictory thoughts and emotions.
- **Harm reduction**: views any action that will reduce harm to ourselves and to others as valuable and worthy of support.
- **Relapse**: returning to a prior behavior that the client has been trying to change.
- **Relapse prevention**: working with clients to help them anticipate and prevent relapse and to plan for how they may recover from a relapse.
- **Risk-reduction counseling**: a form of behavior-change counseling based on harm reduction.

Lecture: Client-Centered Counseling for Behavior Change (60 minutes)
Spend an hour covering the key concepts from Chapter 9. You may choose to use the PowerPoint to guide the lecture or you may use the textbook. Make sure to cover the following themes:

- An Overview of Client-Centered Counseling (p. 223).
- Developing an Action Plan (p. 225).
- Knowledge and Skills for Client-Centered Counseling (p. 231).
- Motivational Interviewing (p. 235).
- Additional Resources for Client-Centered Counseling (p. 246).
- Common Challenges to Client-Centered Counseling (p. 249).
- Team Work and Supervision (p. 251).
- Self-Awareness and Assessment (p. 252).
- Creating a Professional Development Plan (p. 253).

Group Activity (150 min)
Chose TWO of the activities from Chapter 9, based on classroom needs and the time available. Each activity further develops a different skillset or knowledge base that relates to client-centered counseling.

Review and Assessment  30 minutes

Reinforcing Concepts (30 minutes)
Take half an hour to ask students questions from the day’s session. Possible review structures include: informally asking questions and waiting for students to raise their hands, forming a group competition, asking for written answers or asking students to ask each other questions.

Assessment (Optional)
Give students the activity Assessment 8.2: Reflective Writing on Initial Interviews or Assessment 9.1: Case Study Exam. You may assign this assessment as a take-home project or you can allot remaining class time.
Service Learning  

This Service Learning activity will enhance skills learned in this module.

Learners will practice the assessment skills learned in Module 11 with two clients and then complete written reflections about the experience.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Service Learning activity</th>
<th>Hours</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual Assessment</td>
<td>• Practice individual assessment with at least two clients</td>
<td>4</td>
<td>• Completion of two written reflections.</td>
</tr>
<tr>
<td></td>
<td>(at Service Learning placement or other with another community</td>
<td></td>
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<tr>
<td></td>
<td>member)</td>
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<tr>
<td></td>
<td>• Complete two written reflections.</td>
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</tbody>
</table>

Service Learning Activities

*Practice individual assessment with at least two clients:*

- Work with your supervisor to identify opportunities to conduct individual assessments. These could be with clients within the organization or practicing with a colleague.
- Identify an individual assessment form to use for this activity. If there is no specific form used in your organization, work with your instructor to identify an appropriate form to use for this activity.
- Complete two assessments.

Assessment of Individual Assessment:

- Complete two written reflections based on the individual assessments you conducted. Think about the sub-competencies of the written assessment: a) assess barriers to accessing health care and other services, b) help people to identify their goals, barriers to change, and supports for change, and c) continue assessment as an on-going process.
Module 12: Community Assessment

Outline
Community Diagnosis
  Review
  Group Activity 22.1: Introduction to Community Diagnosis
  Lecture: Community Diagnosis
  Group Activity 22.3: Overview of Community Mapping
Review and Assessment
Service Learning

Trainer Preparation:
- Read Chapter 22.
- Read through instructions and handouts for in-class activities.
- Prepare materials needed for activities.

Learner Preparation:
- Read Chapter 22.
- Complete any assigned assessments and Service Learning activities/ reflections.

Timing (Total — 6 hours):
- Lecture — 1 hour, 15 minutes.
- Activities — 3 hours.
- Other — 60 minutes.
- Breaks — 45 minutes (break times are not written in, use your discretion).
- Service learning that allows for practice of community research skills — 4 hours.

Materials:
- Copies of handouts and materials for:
  - Activity 22.3
    - Copies of “Learner Handout 22.3 A: Small Group Walkthrough.”
  - Activity 22.1
    - Copies of “Learner Handout 22.1 A: Community Diagnosis Worksheet.”
    - “For the Trainer 22.1 A: Community Diagnosis Worksheet Answer Key.”

Learning Objectives:
After this session, participants will be able to:
- Chapter 22:
  - Define community diagnosis and discuss key concepts and methods related to community diagnosis.
  - Explain how community diagnosis is used to guide public health programs and efforts to advocate for social change.
  - Describe and apply seven key steps in a community diagnosis process.
  - Participate in the design and execution of a community-centered and strength-based community diagnosis.
  - Discuss the role of the CHW in community diagnosis.
  - Identify and develop effective research tools for gathering information for the diagnosis.
  - Summarize and analyze research findings.
  - Explain how research findings are used to develop an action plan.
Community Diagnosis  

Learning Objectives:

- Define community diagnosis and discuss key concepts and methods related to community diagnosis.
- Explain how community diagnosis is used to guide public health programs and efforts to advocate for social change.
- Describe and apply seven key steps in a community diagnosis process.
- Participate in the design and execution of a community-centered and strength-based community diagnosis.
- Discuss the role of the CHW in community diagnosis.
- Identify and develop effective research tools for gathering information for the diagnosis.
- Summarize and analyze research findings.
- Explain how research findings are used to develop an action plan.

Words to Know

- **Assessment of community strengths and assets**: research into the strengths of a community (experience, culture, skills, etc.) and resources (vision, commitment, leaders, institutions, etc.).
- **Content analysis**: a way of summarizing what people said by grouping, comparing and counting their responses.
- **Institutional review boards (IRBs)**: groups of researchers that evaluate the ethics of research on human subjects.
- **Leading questions**: questions that lead people to the answers you want them to provide.
- **Needs assessment**: research of a community’s risks, problems and lack of resources and skills.
- **Qualitative data**: information about how people feel about an issue (words and pictures).
- **Quantitative data**: information that can be measured numerically or by counting.
- **Root causes**: factors underneath the surface of an issue.
- **Sample**: a representative selection of who you want data on.

Review (30 minutes)

Start the class by reviewing what was covered in the last few class sessions. Ask for definitions of key vocabulary or concepts and see if anyone had new thoughts over the last week or made any new connections to the material. Review lessons learned from any assigned assessment and ask a few students to report back on their Service Learning activities.

Group Activity (80 minutes)

Guide students through Activity 22.1: Introduction to Community Diagnosis. This activity will allow students to review what they read in Chapter 22 through small and large group discussions.

Lecture: Community Diagnosis (75 minutes)

Spend 75 minutes going over the key concepts from the chapter and the first group activity. This topic can feel very academic, so make sure to spend adequate time digesting dense material. Cover the following themes, either using this guide or the PowerPoint:

- Defining Community Diagnosis (p. 635).
- Key Steps in Conducting a Community Diagnosis (p. 639).

Group Activity (100 minutes)

Lead students in Activity 22.3: Overview of Community Mapping. This activity gives learners a taste of the time- and resource-intensive process of community mapping, an important part of community assessments.
Review and Assessment  

**Reinforcing Concepts** (30 minutes)  
Take half an hour to ask students questions from the day’s session. Possible review structures include: informally asking questions and waiting for students to raise their hands, forming a group competition, asking for written answers or asking students to ask each other questions.

**Assessment** (Optional)  
Give students the activity Assessment 22.1: Community Mapping. You may assign this assessment as a take-home project or you can allot remaining class time.

Service Learning  

This Service Learning activity will enhance skills learned in this module. Learners will practice researching community resources and compiling the information in a useable format.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Service Learning activity</th>
<th>Hours</th>
<th>Assessment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Assessment; Identifying Barriers and Resources</td>
<td>• Complete Community Research Table</td>
<td>4</td>
<td>• Completion of Research Table.</td>
</tr>
<tr>
<td>• Identify barriers to accessing health care within a community.</td>
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<tr>
<td>• Share results with partners to develop outreach plans.</td>
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**Service Learning Activity**

*Research Local Resources:*  
- Please take the time to carefully fill out each section of the Research Table found in your Service Learning handbook. In addition, you will need to find and research two health clinics and two community organizations.

- Much of the information about these organizations can likely be found online, however, you should consider this as an opportunity to have a conversation with someone with whom you may interact in the future.