



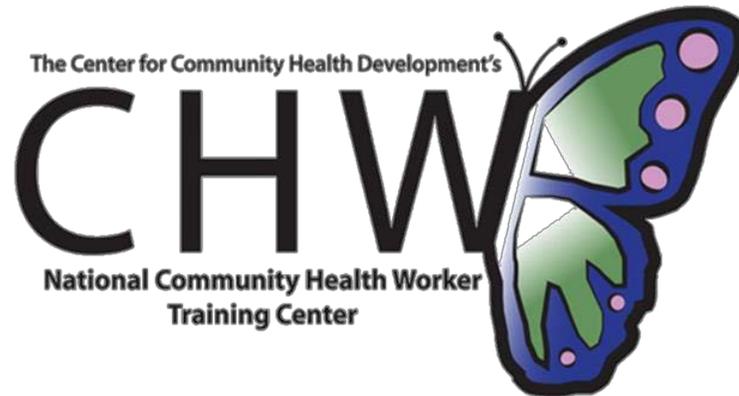
## Implementation Guide:

Tips for Community Health Workers (CHWs),

Instructors (CHWs), and Organizations Implementing a Training Event

May 2018





The Center for Community Health Department's  
National Community Health Worker Training Center

has developed this guide:

**Implementation Guide: Tips for Community Health Workers (CHWs),  
Instructors (CHWIs), and Organizations Implementing a Training Event**

May 2018

**For further information about this guide, please contact:**

The National Community Health Worker Training Center  
1266 TAMU, College Station, TX 77843

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# PREFACE

## **Access to Cancer Training, Information, Outreach, and Navigation**

Cancer Prevention & Research Institute of Texas (CPRIT) funded the Access to Cancer Training, Information, Outreach, and Navigation (ACTION) project.

On the ACTION project, the National Community Health Worker Training Center (NCHWTC) engaged Community Health Workers and partner organizations to deliver more effective cancer education, training, and navigation. The project focuses included: colorectal, cervical, and breast cancer prevention, detection, training, and survivorship.

As a part of this project, the NCHWTC collaborated with UT-Health Northeast in Tyler to develop the *Implementation Guide: Tips for Community Health Workers (CHWs), Instructors (CHWIs), and Organizations Implementing a Training Event*.

## **The National Community Health Worker Training Center**

The NCHWTC is a DSHS-certified CHW training center. The training center functions within the Center for Community Health Development (CCHD), which is a part of the Texas A&M University School of Public Health.

The NCHWTC vision is as follows:

**“Strengthening capacity and building healthier communities through training well-equipped CHWs and Promotores.”**

The training center offers four areas of focus: training and education, research and evaluation, curriculum development, and technical assistance.

Additionally, the NCHWTC offers Community Health Worker (CHW) and Community Health Worker Instructor (CHWI) certifications, and Continuing Education Units (CEUs) online and in-person in both English and Spanish.

Since 2001, the NCHWTC has delivered certification and continuing education courses to over 4,000 CHWs and promotores (Spanish-speaking CHWs).

## **Moving Forward**

The purpose of the *Implementation Guide: Tips for Community Health Workers (CHWs), Instructors (CHWIs), and Organizations Implementing a Training Event* is to provide CHWs, CHWIs and Organizations an easy-to-read, concise overview of the process for implementing a CHW training event.

The guide is inclusive of tips and steps; and, its format is sequential to topics related to the initial and final implementation of a training event.

Kindly refer to the table of contents to see topics.

**Should you have any questions about this guide, please contact the National Community Health Worker Training Center (NCHWTC):**

The National Community Health Worker Training Center

1266 TAMU, College Station, TX 77843

Phone: 979.436.9360

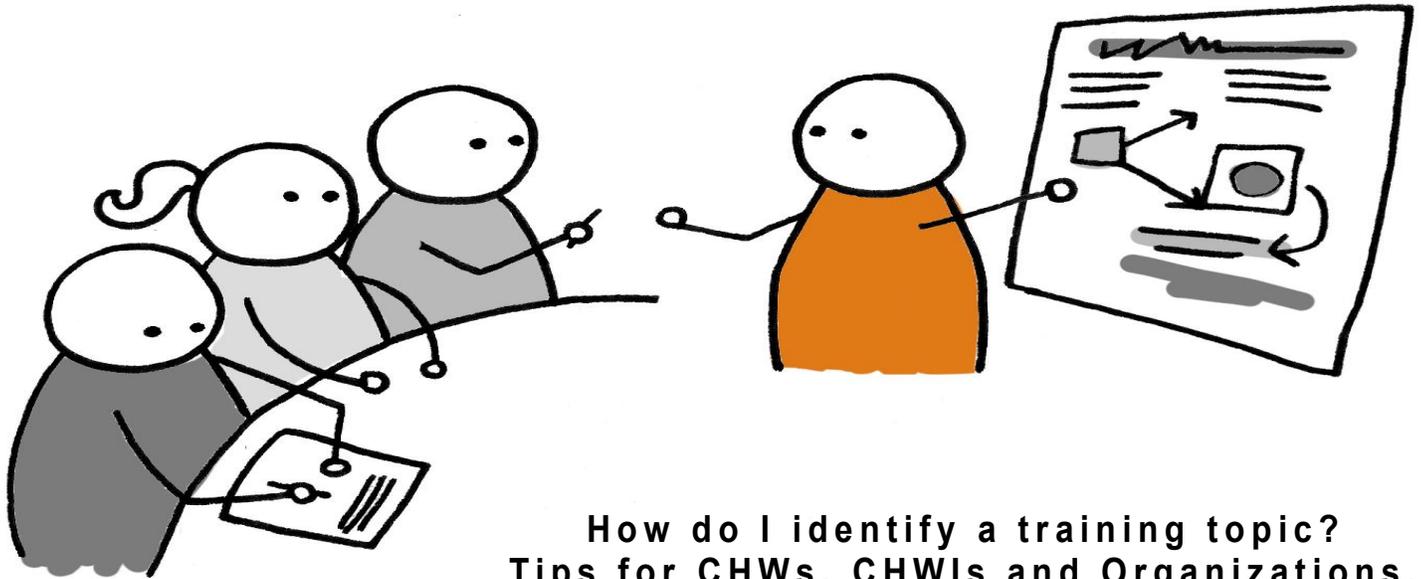
Email: [CHW-Training@tamhsc.edu](mailto:CHW-Training@tamhsc.edu)

Website: <https://nchwtc.tamhsc.edu>

**We look forward to your inquires!**

**May 2018**

# Identifying a Training Topic



How do I identify a training topic?  
Tips for CHWs, CHWIs and Organizations.

## KEY THINGS TO CONSIDER:

- MOTIVATION
- COMMUNITY NEEDS
- COMMUNITY RECEPTION
- COORDINATION CAPACITY
- DELIVERY

TEXAS DEPARTMENT  
OF STATE HEALTH  
SERVICES (DSHS)

CHW Training and  
Certification Program

[http://www.dshs.texas.gov/mch/chw/Community-Health-Workers\\_Program.aspx](http://www.dshs.texas.gov/mch/chw/Community-Health-Workers_Program.aspx)

(512) 776-2570  
or  
(512) 776-2208

When selecting a training topic, take the time to brainstorm by yourself or with organization team members.

1. Reflect on your motivation – *Why offer a training? What's my personal or organization's motivation?*
2. Reflect on the community needs – *What training topic would best benefit CHWs, CHWIs, and the community? What training topic has not been addressed yet?\**
3. Reflect on community reception – *What training topic would people be most receptive to? What training topic would CHWs and CHWIs want to attend the most?*
4. Reflect on coordination capacity to carry out a training – *Think about funds and resources available. Are there possible stakeholders we could involve?*
5. Reflect on delivery- *Will this training need to be DSHS-certified or non-certified?\** *Is affiliation required?\**

# Identifying a Partner Organization

	Helpful	Harmful
Internal Attributes of the organization	Strengths:	Weaknesses:
External Attributes of the environment	Opportunities:	Threats:

## How do I identify a partner organization? Tips for CHWs, CHWIs and Organizations.

### KEY THINGS TO CONSIDER:

- NETWORK CONNECTIONS
- COLLABORATION EFFORTS
- S.W.O.T. ANALYSIS

Before selecting a partner organization:

1. Reflect on your network connections – *Who have we worked with in the past? What new partners may be interested in working together?*
2. Reflect on possible collaboration efforts – *How does their work match or support our needs?*

Additionally, it may help to conduct a S.W.O.T. Analysis for each potential partner organization.

1. Identify “Strengths” – *What are helpful attributes of the organization that could contribute to a successful CHW training?*
2. Identify “Weaknesses” – *What are potentially harmful attributes of the organization would be pose challenges for a CHW training?*
3. Identify “Opportunities” – *What are environmental factors that could contribute to a successful CHW training?*
4. Identify “Threats” – *What are environmental factors that could harm us when planning or delivering a CHW training? CHW trainings and planning with the organization?*

# Coordinating an Initial Planning



## How do I coordinate an initial planning meeting and agenda? Tips for CHWs, CHWIs and Organizations.

### KEY THINGS TO CONSIDER:

- LENGTH OF MEETING
- TEAM AVAILABILITY
- FEEDBACK

### TOOLS:

- Doodle Poll – a great tool to inquire about date/time availability.  
<https://doodle.com/>
- Outlook – sending a Calendar Invite allows meeting organizer to attach a meeting agenda, monitor RSVPs, and provide special instructions for meeting attendance.

Before setting an initial planning meeting, consider the following:

1. Length of meeting – most meetings are 30 or 60 minutes.
2. Team availability & feedback
  - Email all stakeholders to ask about date/time availability for a ½ hour or hour-long meeting.\*
    - Select a final date/time based on responses.

Once a final date/time have been selected, email the team. You can send a meeting agenda with this email, or in a separate email ideally a week before the meeting for team members to review.

When organizing an agenda, outline the topics to be discussed.\*

Example:

- Welcome and Introductions
- Initial Planning for Training
  - Date / Time
  - Location
  - Topic
  - Registration
- Action Items
  - Set follow-up meeting

During the meeting, assign someone to take minutes. After the meeting, email meeting minutes to all invitees (regardless of attendance). Ask team to stay contact re: any changes or updates from the meeting. Remind all invitees of the next meeting date/time.

**TIP\*** Feedback from team members about comments/questions/concerns after and before a meeting may be relevant to organizing a meeting or an agenda.

# Promoting and Recruiting



## How do I promote and recruit participants for a CHW training? Tips for CHWs, CHWIs and Organizations.

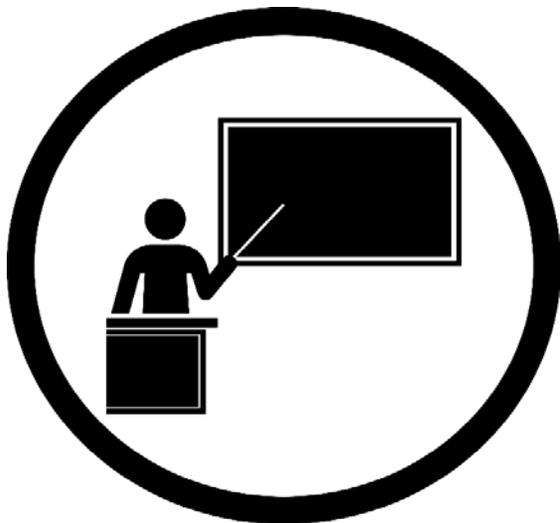
### KEY THINGS TO CONSIDER:

- TIME FRAME
- FLYER
- SOCIAL MEDIA
- USING EXISTING EVENTS
- EMAIL
- REGISTRATION

When promoting and recruiting for a training, consider the following:

1. Time Frame – *Provide at least two months for promoting and recruiting before the event.*
2. Flyer – *Make sure to include the title of the training, number of CEU hours, date, time, location, registration instructions, and the correct logos.*
3. Social Media – *Post the event announcement and flyer on the organization's website, LinkedIn, Twitter, Facebook or other social media profiles.*
4. Using Existing Events – *Distribute flyers and announce the training at upcoming events in the area . Examples: Health Fairs, CRCG meetings, Conferences, or other community meetings*
5. Email – *Request that DSHS forward the announcement to all CHWIs and CHWs in the area. Email the flyer and announcement to nearby CHW organizations and community partners.*
6. Registration – *Think about how the participants register. Will an online link such as Eventbrite work best? Will making phone calls and registering on an excel sheet work best?*

# Preparing Teaching Materials



## State Requirements:

A DSHS-certified CEU must meet three factors: the training program, the curriculum, and the instructor must all be certified by the **Promotor(a) or Community Health Worker Training and Certification Program**.

CEUs are available face-to-face or online, depending on the CHW training program offering the course.

## How do I prepare materials for a training? Tips for CHWs, CHWIs and Organizations.

### KEY THINGS TO CONSIDER:

- PRESENTATION(S)
- PRE & POST TESTS
- EVALUATIONS
- CERTIFICATES
- ACTIVITY HANDOUTS/MATERIALS
- AGENDA

Consider the following suggestions when preparing the teaching materials:

#### Presentation(s) \*

1. Review the presentation and lesson plans to be used. The instructor will need to be comfortable with delivering the training using these materials, so reach out to the curriculum developers with any questions.
2. If necessary, condense the presentation to the appropriate number of CEU hours. For example, a 4.0 CEU can be edited and delivered as a 3.0 CEU if you only have 3 hours to present. Incorporate interactive activities. Well-designed activities will initiate dialogue and enhance retention among CHWs.
3. Review and revise any grammatical or formatting errors

**Pre & Post Tests** – *Serves as a capacity building tool for the CHW Instructor(s) leading the training by providing feedback on the CHWs' knowledge before and after the training.*

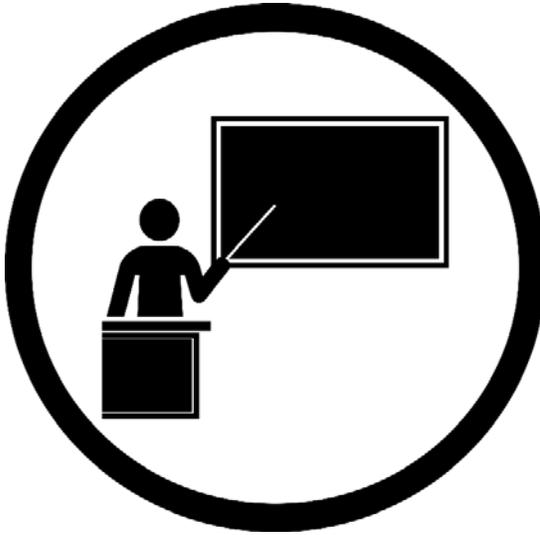
- Preferably print on different color paper to avoid confusion \*

**Evaluations** – *Serves as a capacity building tool for the CHW Instructor(s) leading the training by providing feedback on the training as a whole.*

- Feedback prepares the CHWI(s) for a better training next *time* \*

**TIP\*** *Make sure to obtain an official count of the registrants beforehand to be able to provide enough copies of the presentation(s) and handouts!*

# Preparing Teaching Materials Continued...



## State Requirements:

A DSHS-certified CEU must meet three factors: the training program, the curricula and the instructor must be certified by the **Promotor(a) or Community Health Worker Training and Certification Program**.

CEUs are available face-to-face or online depending on the CHW training program offering the course.

## How do I prepare the teaching materials? Tips for CHWs, CHWIs and Organizations.

### KEY THINGS TO CONSIDER:

- PRESENTATION(S)
- PRE & POST TESTS
- EVALUATIONS
- CERTIFICATES
- ACTIVITY HANDOUTS/MATERIALS
- AGENDA

Consider the following suggestions when preparing the teaching materials:

**Certificates** – CHWIs and CHWs need to submit proof to the state for completing a DSHS certified or non-certified CEU training. You can print blank certificates and add the CHW/Is' names after the training, or you can print certificates with names of registrants already listed.

**Activity Handouts/Materials** – Make a checklist of the activity handouts that go along with the presentation(s) to ensure all materials are packaged.

1. Take enough printed copies of each handout for every CHW/I.
2. Package supplies such as markers, pencils, construction paper, etc. needed for any activities.

**Agenda** – Serves as an organizational tool for the CHW Instructor(s) leading the training as well as for the trainees attending the training.

- Following an agenda allows the instructor and students to manage their time effectively.\*

# Setting Up the Event



**How do I setup for a CHW training?  
Tips for CHWs, CHWIs and Organizations.**

## KEY THINGS TO CONSIDER:

- DAY BEFORE
- DAY OF

The day before a training, finalize any pending logistical details and package all the materials.

**Day Before** – *Organizing yourself the day before decreases the possibility of mistakes during the training.*

1. E-mail yourself a copy of the presentations.
2. Save all the presentations and handouts on a USB.
3. Print a copy of the presentation with notes as a reference during the training(s).\*
4. Make enough copies:
  - Presentations
  - Pre & Post Tests
  - Evaluations
  - Certificates
  - Activity Handouts
  - Agenda
5. Package your materials:
  - USB
  - Copies
  - Activity Materials: markers, pencils, construction paper, etc. if necessary for the activities.
6. Touch base with any team members also attending to confirm plans.
7. Review/study the presentation so you won't need to read from the slides during the training.\*

# Setting Up the Event Continued...



## How do I set-up for a CHW training? Tips for CHWs, CHWIs and Organizations.

### KEY THINGS TO CONSIDER:

- DAY BEFORE
- DAY OF

The day of a training, the set up process is an important part of delivering a successful training(s).

**Day Of** – *Make sure you and your team members arrive at least half an hour before registration to allow sufficient time for set up.*

#### 1. Before the training starts:

- Set out the sign-in sheet
- Set out the Pre-Tests
- Set out the activity handouts and pertinent handouts related to the training (before or during activity)
- Have the presentation ready on the projector screen
- Rearrange the seats to face the CHWI(s) leading the training

#### 2. After the training ends:

- Pass out the Post-Test & Evaluation
- Evaluation
- Make sure no one has left without signing in, - this is required for DSHS-certified CEU credits\*
- Clip and store all sign-in sheets, pre-tests, post-tests, and evaluations inside a secure folder or binder
- Distribute certificates of completion

# Delivering a CHW Training

## How do I deliver a CHW training? Tips for CHWs, CHWIs and Organizations.

Once certified by DSHS, CHW/Is are required to obtain 20 hours of continuing education (CEUs) every two years. Ten of these CEUs must be certified [a certified curriculum taught by a certified (guest) instructor affiliated with a certified training center], while the other ten CEUs can be either certified or uncertified. Many CHW/Is attend training events to earn CEUs. Others attend training events because they are interested in the topic. Regardless of their reason for attending, the goal for an instructor should be to deliver an informative, interactive training for CHWs that will help them in their practice.

### Official text from DSHS:

1. From the Training Program Application for Certification:
  - The curriculum is to be linked to the educational level and cultural background of the learner.
  - To be effective, the curriculum should be delivered by a bilingual, culturally sensitive instructor and serve as a bridge to other cultures.
  - All curriculum sessions are interactive and engage the learn
  - The curriculum is to be based on a community needs assessment and is designed to benefit the community where the learner will practice.
  - A variety of teaching methods used are participatory in nature and are based on inquiry and discovery.
  - An experienced local instructor is preferred.
  - A supportive, accepting and caring social environment where learning occurs will enhance the learner's acquisition of new skills and knowledge.
  - Training programs must be convenient and held in a non-threatening environment.
  - The curriculum should focus at a minimum on the learner-centered objectives for each competency area.
  - Respect, sensitivity, flexibility, cost, and relevance are paramount to the learner.
2. From Curriculum Submission Form:
  - Interactive component - Describe how the curriculum will be interactive and engage learners.
  - Literacy level - Describe the process and/or tool you utilized to determine that the literacy level is appropriate.
  - Adult Learning Principles - Describe how the curriculum utilizes adult learning principles.

For specific questions regarding DSHS delivery, evaluation, and reporting contact the following: TEXAS  
DEPARTMENT OF STATE HEALTH SERVICES (DSHS)  
CHW Training and Certification Program

[http://www.dshs.texas.gov/mch/chw/Community-Health-Workers\\_Program.aspx](http://www.dshs.texas.gov/mch/chw/Community-Health-Workers_Program.aspx)

(512) 776-2570

or

(512) 776-2208

# Delivering a CHW Training Continued...

## How do I deliver a CHW training? Tips for CHWs, CHWIs and Organizations.

3. From Guest Instructor Procedure
  - A certified training program may request approval from DSHS to include a guest speaker/presenter as part of DSHS-certified contact hours with documentation that the following requirements are met. The training program is responsible for ensuring the credentials and expertise of a guest instructor.
  - The proposed guest instructor must meet at least two of the following qualifications:
    - Licensure or certification in field related to training topic, including CHW certification
    - Advanced degree in field related to training topic [Masters or Doctorate]
    - Publication [peer-reviewed journal] or research related to training topic
    - Current work (agency/employer/supervisor) related to training topic
    - Other unique qualifications, such as a unique life experience related to training topic [example – cancer survivor]
  - The guest instructor may provide no more than 2 hours of training a day for a CE event.
    - A certified instructor must be available during the guest instructor's presentation to assist and/or answer questions as needed for in-person events and real time (synchronous) webinars. Examples might include being present/in attendance, logged into the webinar with the ability to see and answer questions, or available via email.

### Specific Steps:

#### 1. Before:

- Make sure that the presentation, materials, A/V connections, etc. are prepared before the training.
- Set up a registration/sign-in sheet at least 30 minutes before the scheduled start of the training, and then ask all participants to sign in. This information will be used to generate the roster for the course following the training.
- Have a lesson plan and/or print copy of the presentation available when delivering the training so that the lesson stays on time.

#### 2. During:

- Open with an introduction of the instructor, their training center, and the course.
- Administer and collect the pre-tests.
- Follow the lesson plan/presentation overview to present a combination of lecture-based training, hands-on activities, interactive discussion, and videos. Effective trainings follow adult learning principles and present relevant information to CHWs in a culturally competent, community-friendly manner.
- If any participants have questions that you are unable to answer, make a note of the question and say you'll get back to them (either after a break or after the training). When you do get back with a response, send reputable resources of where CHWs can access information addressing the question.
- The best trainings incorporate opportunities for CHWs to learn from each other, particularly about local resources and programs.

#### 3. After:

- Collect all post-tests and evaluations, and store them with the pre-tests. This data will be used to assess the training.
- Clean and pack up the training site.
- Send thank you emails to all partners/hosts.
- Within a week, send the roster of participants to DSHS.

# Evaluating a Training Workshop

## How do I evaluate a training workshop? Tips for CHWs, CHWIs and Organizations.

Evaluation is an important component of any training for CHW/Is. Evaluating the effectiveness of training provides information to the instructor and training center about how to improve future trainings. Additionally, the DSHS CHW Training Program requires that all certified trainings include an evaluation component, so evaluating a training workshop is part of remaining compliant with state regulations. Evaluations can consist of pre/post-tests measuring knowledge, attitudes, behaviors, self-efficacy and other indicators, as well as in-class activities, quizzes, and interactions. Incorporating an opportunity for CHW/Is to provide feedback on the instructor, the training content, and other aspects of the training can also be a form of evaluation.

Official text from DSHS:

1. From training program application:
  - Evaluation is integral to a quality training program.
  - Evaluation Methods – Purpose: Evaluate and document the acquisition of knowledge and mastery of skills by the individual and the success of the training program according to the performance measures framework established within the National Community Health Advisor Study, June 1998.
2. From curriculum submission application:
  - Evaluation component - Include any pre/post-test or describe other process/tool to be used to evaluate acquisition of skills/knowledge

### Specific Steps:

1. Administer pre-test questions to participants at the beginning of the training. Once completed, collect pre-tests and clip/file together.
  - Note, most curricula include sets of pre/post-questions.
  - If you need matched data, ask participants to write names or de-identified codes on their pre-tests. They will label their post-tests and assessments the same way.
2. During training, assessment of CHW/I learning occurs through planned activities, class discussions, small group work, quizzes, and other interactive opportunities for CHW/Is to demonstrate mastery of concepts and skills.
3. At the end of the training, administer post-test questions to participants. Collect post-tests and clip/file together.
  - It is helpful to have pre-tests printed on one color paper and post-tests printed on another to avoid confusion.
4. At the end of the training, administer evaluation questions to receive feedback on the instructor, the training content, and other aspects of the training. Collect evaluations and clip/file together.
5. Following the training, enter and analyze pre/post-test and evaluation data.

# DSHS Reporting Requirements

## How do I report trainings to DSHS? Tips for CHWs, CHWIs and Organizations.

Following any CHW training, two kinds of documentation are produced: 1) CHWs receive a certificate of completion and 2) the training center submits a roster of CHWs who earned a certificate to DSHS.

CHWs submit certificates of completion to DSHS as part of the initial certification process and as part of the renewal process. When DSHS receives a CHW's certificate of completion (either as part of an initial application or a renewal application), they check the rosters sent by training centers to confirm that the certificate of completion is valid.

### Official text from DSHS:

1. From roster template: "Within 7 days of program completion, the Sponsoring Institution/Training Program is to report the names of individuals who have successfully completed the education/training program."
2. From Training Program Application for Certification:
  - Each Sponsoring Institution or training program shall retain an accurate record of each person's attendance and participation for five years from the date of their completion of the training program. Attach a sample attendance record.
  - The format should include:
    - NAME OF TRAINING PROGRAM/SPONSORING ORGANIZATION
    - TITLE OF TRAINING
    - DATE TRAINING HELD OR COMPLETED
    - TOTAL CONTACT HOURS AND CORE COMPETENCIES COVERED
    - LOCATION OF TRAINING (CITY)
    - INSTRUCTOR NAME
    - LIST OF PARTICIPANTS COMPLETING THE TRAINING – WITH CONTACT INFORMATION SUCH AS ADDRESS, PHONE, AND EMAIL
    - FOR CONTINUING EDUCATION – WHETHER PARTICIPANT IS CURRENTLY CERTIFIED AS A CHW

### Specific Steps:

1. Enter required information about CEU in roster template (#1-7 above).
2. Enter required information about CHWs/instructors in roster template for everyone who earned a certificate (#8-9 above). This information will come from the sign-in sheets and/or registration forms.
3. Within a week of the event, email roster to DSHS with names of all students who have received certificate.
4. Save roster (hard copy and/or digital version) for reference.

**TIP\*** For specific questions regarding DSHS delivery, evaluation, and reporting, contact Texas Department of State Health Services (DSHS), CHW Training and Certification Program!