

Advancing California's Community Health Worker & Promotor Workforce in Medi-Cal

Program Design Checklist

This design checklist provides a high-level description of the managed care plan (MCP) activities necessary to establish a program with community health worker and *promotor* (CHW/P) services. MCPs can use this checklist to quickly find information within the [*Advancing California's Community Health Worker & Promotor Workforce in Medi-Cal Resource Guide*](#) to support program development.



STEP	RELATED RESOURCES
Developing and Financing CHW/Ps Programs and Partnerships	
<ul style="list-style-type: none"> ✓ Assess the needs of the community and use data to determine priority populations for a CHW/P intervention 	Subsection: Assess needs and determine priority populations Exhibit: Sample organizational assessment questions
<ul style="list-style-type: none"> ✓ Identify program goals and design program scope, in partnership with CHW/Ps: <ul style="list-style-type: none"> - Consider needed services and program models for enhanced care management and in lieu of services 	Subsection: Identify program goals and design program scope Link: Department of Health Care Services (DHCS) CalAIM website
<ul style="list-style-type: none"> ✓ Assess whether an MCP should explore partnership with a provider or community-based organization that employs CHW/Ps: <ul style="list-style-type: none"> - Research potential partners - Assess their capacity for partnership - Determine the size and scale for partnership 	Subsection: Partnerships between MCPs and organizations with CHW/P programs Exhibit: Sample pros and cons for partnerships
<ul style="list-style-type: none"> ✓ Explore core contract components between MCPs and partner organizations and finalize effective contracting agreements 	Subsection: Develop strong contractual partnerships Appendix: Sample contract terms
<ul style="list-style-type: none"> ✓ Consider applying incentives as part of a financial sustainability plan 	Subsection: Program financial sustainability
<ul style="list-style-type: none"> ✓ Access resources about program design and financing 	Section: Resources and tools
Establishing Roles and Recruiting CHW/Ps	
<ul style="list-style-type: none"> ✓ Designate clear roles for CHW/Ps that meaningfully incorporate the unique strengths of this workforce and insights from CHW/Ps 	Subsection: Define CHW/P roles Exhibit: Core CHW roles Appendix: CHW/Ps in CalAIM's Enhanced Care Management and In Lieu of Services
<ul style="list-style-type: none"> ✓ Establish CHW/P supervisory models: <ul style="list-style-type: none"> - Identify the position that will supervise CHW/Ps - Determine CHW/P-to-supervisor ratio 	Subsection: Establish CHW/P supervisory models
<ul style="list-style-type: none"> ✓ Identify CHW/P caseloads in the context of the complexity of member needs, documentation requirements, and required travel time 	Subsection: Establish appropriate CHW/P caseloads
<ul style="list-style-type: none"> ✓ Facilitate effective integration of CHW/Ps into interdisciplinary teams: <ul style="list-style-type: none"> - Develop protocols and job aids to assist CHW/Ps in their work 	Subsection: Develop supports for interdisciplinary team integration

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STEP	RELATED RESOURCES
Establishing Roles and Recruiting CHW/Ps (continued)	
<ul style="list-style-type: none"> ✓ Develop job descriptions that clearly define CHW/P roles, tasks, competencies, and qualifications to recruit candidates who will succeed in this position 	Subsection: Create job descriptions that align with CHW/P roles Exhibit: Core CHW skills
<ul style="list-style-type: none"> ✓ Use traditional and nontraditional recruiting tools and employ interview techniques to identify candidates with strong interpersonal skills 	Subsection: Use effective recruiting strategies
<ul style="list-style-type: none"> ✓ Access resources on CHW/P roles, supervision, and recruitment, such as sample job descriptions 	Section: Resources and tools
Training and Supporting CHW/Ps	
<ul style="list-style-type: none"> ✓ Review principles and methodologies for CHW/P training, including the importance of engaging CHW/Ps in design and delivery of training 	Subsection: Principles and methodologies Subsection: Engagement of CHW/Ps as co-designers and trainers
<ul style="list-style-type: none"> ✓ Identify organization to lead training (whether an external partner or internal) for training of CHW/Ps and employer organizations 	Subsection: Training implementation Appendix: Select California and national CHW/P training programs
<ul style="list-style-type: none"> ✓ Develop training strategy and curricula for four types of CHW/P training: <ul style="list-style-type: none"> - Core competencies - Required program-specific specialized skills - Organizational processes and workflows - Continuing education 	Subsection: Levels of CHW/P training
<ul style="list-style-type: none"> ✓ Establish training strategy and curriculum for the team members of CHW/Ps and for organizational leaders 	Subsection: Training for organizations and supervisors
<ul style="list-style-type: none"> ✓ Develop training strategy and curriculum for CHW/P supervisors 	Subsection: Training for CHW/P supervisors
<ul style="list-style-type: none"> ✓ Access existing examples of training frameworks and materials to inform organizational efforts 	Section: Resources and tools
Engaging CHW/Ps in Data Collection and Program Outcome Measurement	
<ul style="list-style-type: none"> ✓ Assess data goals and establish required data to support CHW/Ps in meeting member needs 	Subsection: Goal setting
<ul style="list-style-type: none"> ✓ Establish data-sharing agreements 	Subsection: Shared data agreements in CHW/P programs
<ul style="list-style-type: none"> ✓ Engage with CHW/Ps to inform data collection strategies and understand what data can support their work 	Subsection: CHW/P priorities in data collection and outcome measurement
<ul style="list-style-type: none"> ✓ Identify and develop an implementation plan for tools that can help CHW/Ps support the conducting of health and social assessments 	Subsection: Tools to help CHW/Ps support health and social needs assessments
<ul style="list-style-type: none"> ✓ Develop standardized tools, data collection methods, and platforms to connect CHW/P encounter data with members' electronic health records 	Subsection: Sharing member data Subsection: Technology considerations
<ul style="list-style-type: none"> ✓ Identify outcome measures to evaluate CHW/P activities 	Subsection: Designing evaluation strategies for CHW/P activities Exhibit: Sample measures to evaluate CHW/P activities
<ul style="list-style-type: none"> ✓ Access resources on data collection and program evaluation 	Section: Resources and tools

Learn More

This resource is part of the *Advancing California's Community Health Worker & Promotor Workforce in Medi-Cal* Resource Center. The Resource Center and accompanying Resource Guide are a compilation of resources and information gathered by the California Health Care Foundation as part of a project to better integrate community health workers and *promotores* (CHW/Ps) into California's health system. To learn more, visit www.chcf.org/chwps-medi-cal.

