



# Continuing Competency Performance Assessment

## Certified Health Education Specialists (CHES®)

## Master Certified Health Education Specialists (MCHES®)

**Continuing Competency Definition: “Demonstrating specified levels of knowledge, skills, or ability not only at the time of initial certification but throughout an individual’s professional career.”**

Completion of this form is a two-step process as part of the Continuing Competency Performance Appraisal for recertification:

1. The **credential holder** completes a self-appraisal of his/her performance demonstrating continuing competency.
2. The **assessor** reviews and responds to the Continuing Competency Performance Assessment and returns it to the applicant. The assessor may be a current supervisor/manager, past supervisor/manager, or a client.\*
3. The **credential holder** must forward the completed form via email, online upload or mail to:

**NCHEC**  
**1541 Alta Drive, Suite 303**  
**Whitehall, PA 18052**  
**E: [mschmell@nchech.org](mailto:mschmell@nchech.org)**

**Credential holder:** Provide a detailed, but brief, description regarding your engagement in **one** Health Education Areas of Responsibility or Advanced Sub-Competency (MCHES® only). The activity must correspond to one of the Areas of Responsibility and must be within the **past five years. After the completion of this form, please submit to your assessor for verification. The assessor should complete and return the form to you, the credential holder.**

**Credential Holder’s Name** \_\_\_\_\_ **CHES®/MCHES® ID #** \_\_\_\_\_  
First/Given MI Last

I affirm that the information provided with this Continuing Competency Performance Assessment form is true to the best of my knowledge. I further grant permission to NCHEC to verify this information with the Assessor.

### Self-Appraisal of Continuing Competency Activity

Name of Continuing Competency Activity:	Year activity completed: <i>(within the past 5 years)</i>
Area of Responsibility:	Advanced-level Competency/Sub-competency (MCHES® only):
Description of credential holder’s activity and how it relates to an Area of Responsibility or Advanced-level Sub-Competency and how it demonstrates continuing competency. (no more than 200 words):	

# ASSESSOR

**Assessor:** (Please read and complete all shaded areas only)

The credential holder named above is completing the continuing competency requirement as part of recertification of their Certified Health Education Specialist (CHES®) or Master Certified Health Education Specialist (MCHES®) certification. Your evaluation of the credential holder's performance in health education provides very important information regarding competency of actual work performance.

**Name** \_\_\_\_\_  
Salutation First/Given Last Suffix

**Company** \_\_\_\_\_ **Title/Position** \_\_\_\_\_

**Address** \_\_\_\_\_  
Number & Street Apartment #

\_\_\_\_\_  
City/Town State Country ZIP/Postal Code

**Day Phone** (\_\_\_\_\_) \_\_\_\_\_ **E-mail** \_\_\_\_\_

**Degree/Licenses/Certifications Held** \_\_\_\_\_

## BASIS FOR COMMENTS

Period during which you have had personal knowledge of credential holder in practice as a health education specialist (CHES®/MCHES®)

From (MM/YY): \_\_\_\_\_ To (MM/YY): \_\_\_\_\_

Company/Organization which serves as a basis for your assessment: \_\_\_\_\_

Nature of your relationship with the credential holder:

\_\_\_\_ Supervisor/manager

\_\_\_\_ Past supervisor/manager

\_\_\_\_ Client\*

\* A **client** is: A person or entity who approves, administrates, or facilitates the health education deliverable that the consultant has been asked to complete as documented in the Category II Assessment Form. Services include, but are not limited to: health education services, meeting facilitation of workgroups or stakeholders, coalition building, grant writing, authorship, program development, or curriculum development.

## VALIDATION OF CREDENTIAL HOLDER'S EXPERIENCE BY ASSESSOR

Based on your observation of the credential holder's competency of practice:

\_\_\_\_ I am able to attest to the credential holder's competency with respect to the Areas of Responsibility of Health Education Specialists.

\_\_\_\_ I am unable to attest to the credential holder's competency with respect to the Areas of Responsibility of Health Education Specialists.

Please briefly comment to support the attested rating noted above:

I attest there is no conflict of interest in completing the Continuing Competency Performance Assessment for this individual.

Assessor name: \_\_\_\_\_

Company: \_\_\_\_\_

\*Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

\*Assessor may be contacted by NCHCEC to verify this information.

**Health Education Specialist Practice Analysis (HESPA) 2015  
Competencies and Sub-competencies**

**(Advanced-level sub-competencies are highlighted)**

**Area I: Assess Needs, Resources, and Capacity for Health Education/Promotion**

**1.1 Plan assessment process for health education/promotion**

- 1.1.1 Define the priority population to be assessed
- 1.1.2 Identify existing and necessary resources to conduct assessments
- 1.1.3 Engage priority populations, partners, and stakeholders to participate in the assessment process
- 1.1.4 Apply theories and/or models to assessment process
- 1.1.5 Apply ethical principles to the assessment process

**1.2 Access existing information and data related to health**

- 1.2.1 Identify sources of secondary data related to health
- 1.2.2 Establish collaborative relationships and agreements that facilitate access to data
- 1.2.3 Review related literature
- 1.2.4 Identify gaps in the secondary data
- 1.2.5 Extract data from existing databases
- 1.2.6 Determine the validity of existing data

**1.3 Collect primary data to determine needs**

- 1.3.1 Identify data collection instruments
- 1.3.2 Select data collection methods for use in assessment
- 1.3.3 Develop data collection procedures
- 1.3.4 Train personnel assisting with data collection
- 1.3.5 Implement quantitative and/or qualitative data collection

**1.4 Analyze relationships among behavioral, environmental, and other factors that influence health**

- 1.4.1 Identify and analyze factors that influence health behaviors
- 1.4.2 Identify and analyze factors that impact health
- 1.4.3 Identify the impact of emerging social, economic, and other trends on health

**1.5 Examine factors that influence the process by which people learn**

- 1.5.1 Identify and analyze factors that foster or hinder the learning process
- 1.5.2 Identify and analyze factors that foster or hinder knowledge acquisition
- 1.5.3 Identify and analyze factors that influence attitudes and beliefs
- 1.5.4 Identify and analyze factors that foster or hinder acquisition of skills

**1.6 Examine factors that enhance or impede the process of health education/promotion**

- 1.6.1 Determine the extent of available health education/promotion programs and interventions
- 1.6.2 Identify policies related to health education/promotion
- 1.6.3 Assess the effectiveness of existing health education/promotion programs and interventions
- 1.6.4 Assess social, environmental, political, and other factors that may impact health education/promotion
- 1.6.5 Analyze the capacity for providing necessary health education/promotion

**1.7 Determine needs for health education/promotion based on assessment findings**

- 1.7.1 Synthesize assessment findings
- 1.7.2 Identify current needs, resources, and capacity
- 1.7.3 Prioritize health education/promotion needs
- 1.7.4 Develop recommendations for health education/promotion based on assessment findings
- 1.7.5 Report assessment findings

**Area II: Plan Health Education/Promotion**

**2.1 Involve priority populations, partners, and other stakeholders in the planning process**

- 2.1.1 Identify priority populations, partners, and other stakeholders
- 2.1.2 Use strategies to convene priority populations, partners, and other stakeholders
- 2.1.3 Facilitate collaborative efforts among priority populations, partners, and other stakeholders
- 2.1.4 Elicit input about the plan
- 2.1.5 Obtain commitments to participate in health education/promotion

**2.2 Develop goals and objectives**

- 2.2.1 Identify desired outcomes using the needs assessment results
- 2.2.2 Develop vision statement
- 2.2.3 Develop mission statement
- 2.2.4 Develop goal statements
- 2.2.5 Develop specific, measurable, attainable, realistic, and time-sensitive objectives

**2.3 Select or design strategies/interventions**

- 2.3.1 Select planning model(s) for health education/promotion
- 2.3.2 Assess efficacy of various strategies/interventions to ensure consistency with objectives
- 2.3.3 Apply principles of evidence-based practice in selecting and/or designing strategies/interventions
- 2.3.4 Apply principles of cultural competence in selecting and/or designing strategies/interventions
- 2.3.5 Address diversity within priority populations in selecting and/or designing strategies/interventions
- 2.3.6 Identify delivery methods and settings to facilitate learning
- 2.3.7 Tailor strategies/interventions for priority populations
- 2.3.8 Adapt existing strategies/interventions as needed
- 2.3.9 Conduct pilot test of strategies/interventions
- 2.3.10 Refine strategies/interventions based on pilot feedback
- 2.3.11 Apply ethical principles in selecting strategies and designing interventions
- 2.3.12 Comply with legal standards in selecting strategies and designing interventions

**2.4 Develop a plan for the delivery of health education/promotion**

- 2.4.1 Use theories and/or models to guide the delivery plan
- 2.4.2 Identify the resources involved in the delivery of health education/promotion
- 2.4.3 Organize health education/promotion into a logical sequence
- 2.4.4 Develop a timeline for the delivery of health education/promotion
- 2.4.5 Develop marketing plan to deliver health program
- 2.4.6 Select methods and/or channels for reaching priority populations
- 2.4.7 Analyze the opportunity for integrating health education/promotion into other programs
- 2.4.8 Develop a process for integrating health education/promotion into other programs when needed
- 2.4.9 Assess the sustainability of the delivery plan
- 2.4.10 Design and conduct pilot study of health education/promotion plan

**2.5 Address factors that influence implementation of health education/promotion**

- 2.5.1 Identify and analyze factors that foster or hinder implementation
- 2.5.2 Develop plans and processes to overcome potential barriers to implementation

**Area III: Implement Health Education/Promotion**

**3.1 Coordinate logistics necessary to implement plan**

- 3.1.1 Create an environment conducive to learning
- 3.1.2 Develop materials to implement plan
- 3.1.3 Secure resources to implement plan
- 3.1.4 Arrange for needed services to implement plan
- 3.1.5 Apply ethical principles to the implementation process
- 3.1.6 Comply with legal standards that apply to implementation

**3.2 Train staff members and volunteers involved in implementation of health education/promotion**

- 3.2.1 Develop training objectives
- 3.2.2 Recruit individuals needed for implementation
- 3.2.3 Identify training needs of individuals involved in implementation
- 3.2.4 Develop training using best practices
- 3.2.5 Implement training
- 3.2.6 Provide support and technical assistance to those implementing the plan
- 3.2.7 Evaluate training
- 3.2.8 Use evaluation findings to plan/modify future training

**3.3 Implement health education/promotion plan**

- 3.3.1 Collect baseline data
- 3.3.2 Apply theories and/or models of implementation
- 3.3.3 Assess readiness for implementation
- 3.3.4 Apply principles of diversity and cultural competence in implementing health education/promotion plan
- 3.3.5 Implement marketing plan
- 3.3.6 Deliver health education/promotion as designed
- 3.3.7 Use a variety of strategies to deliver plan

**3.4 Monitor implementation of health education/promotion**

- 3.4.1 Monitor progress in accordance with timeline
- 3.4.2 Assess progress in achieving objectives
- 3.4.3 Ensure plan is implemented consistently
- 3.4.4 Modify plan when needed
- 3.4.5 Monitor use of resources
- 3.4.6 Evaluate sustainability of implementation
- 3.4.7 Ensure compliance with legal standards
- 3.4.8 Monitor adherence to ethical principles in the implementation of health education/promotion

## **Area IV: Conduct Evaluation and Research Related to Health Education/Promotion**

### **4.1 Develop evaluation plan for health education/promotion**

- 4.1.1 Determine the purpose and goals of evaluation
- 4.1.2 Develop questions to be answered by the evaluation
- 4.1.3 Create a logic model to guide the evaluation process
- 4.1.4 Adapt/modify a logic model to guide the evaluation process
- 4.1.5 Assess needed and available resources to conduct evaluation
- 4.1.6 Determine the types of data (for example, qualitative, quantitative) to be collected
- 4.1.7 Select a model for evaluation
- 4.1.8 Develop data collection procedures for evaluation
- 4.1.9 Develop data analysis plan for evaluation
- 4.1.10 Apply ethical principles to the evaluation process

### **4.2 Develop a research plan for health education/promotion**

- 4.2.1 Create statement of purpose
- 4.2.2 Assess feasibility of conducting research
- 4.2.3 Conduct search for related literature
- 4.2.4 Analyze and synthesize information found in the literature
- 4.2.5 Develop research questions and/or hypotheses
- 4.2.6 Assess the merits and limitations of qualitative and quantitative data collection
- 4.2.7 Select research design to address the research questions
- 4.2.8 Determine suitability of existing data collection instruments
- 4.2.9 Identify research participants
- 4.2.10 Develop sampling plan to select participants
- 4.2.11 Develop data collection procedures for research
- 4.2.12 Develop data analysis plan for research
- 4.2.13 Develop a plan for non-respondent follow-up
- 4.2.14 Apply ethical principles to the research process

### **4.3 Select, adapt and/or create instruments to collect data**

- 4.3.1 Identify existing data collection instruments
- 4.3.2 Adapt/modify existing data collection instruments
- 4.3.3 Create new data collection instruments
- 4.3.4 Identify useable items from existing instruments
- 4.3.5 Adapt/modify existing items
- 4.3.6 Create new items to be used in data collection
- 4.3.7 Pilot test data collection instrument
- 4.3.8 Establish validity of data collection instruments
- 4.3.9 Ensure that data collection instruments generate reliable data
- 4.3.10 Ensure fairness of data collection instruments (for example, reduce bias, use language appropriate to priority population)

### **4.4 Collect and manage data**

- 4.4.1 Train data collectors involved in evaluation and/or research
- 4.4.2 Collect data based on the evaluation or research plan
- 4.4.3 Monitor and manage data collection
- 4.4.4 Use available technology to collect, monitor and manage data
- 4.4.5 Comply with laws and regulations when collecting, storing, and protecting participant data

### **4.5 Analyze data**

- 4.5.1 Prepare data for analysis
- 4.5.2 Analyze data using qualitative methods
- 4.5.3 Analyze data using descriptive statistical methods
- 4.5.4 Analyze data using inferential statistical methods
- 4.5.5 Use technology to analyze data

### **4.6 Interpret results**

- 4.6.1 Synthesize the analyzed data
- 4.6.2 Explain how the results address the questions and/or hypotheses
- 4.6.3 Compare findings to results from other studies or evaluations
- 4.6.4 Propose possible explanations of findings
- 4.6.5 Identify limitations of findings
- 4.6.6 Address delimitations as they relate to findings
- 4.6.7 Draw conclusions based on findings
- 4.6.8 Develop recommendations based on findings

#### **4.7 Apply findings**

- 4.7.1 Communicate findings to priority populations, partners, and stakeholders
- 4.7.2 Solicit feedback from priority populations, partners, and stakeholders
- 4.7.3 Evaluate feasibility of implementing recommendations
- 4.7.4 Incorporate findings into program improvement and refinement
- 4.7.5 Disseminate findings using a variety of methods

#### **Area V: Administer and Manage Health Education/Promotion**

##### **5.1 Manage financial resources for health education/promotion programs**

- 5.1.1 Develop financial plan
- 5.1.2 Evaluate financial needs and resources
- 5.1.3 Identify internal and/or external funding sources
- 5.1.4 Prepare budget requests
- 5.1.5 Develop program budgets
- 5.1.6 Manage program budgets
- 5.1.7 Conduct cost analysis for programs
- 5.1.8 Prepare budget reports
- 5.1.9 Monitor financial plan
- 5.1.10 Create requests for funding proposals
- 5.1.11 Write grant proposals
- 5.1.12 Conduct reviews of funding proposals
- 5.1.13 Apply ethical principles when managing financial resources

##### **5.2 Manage technology resources**

- 5.2.1 Assess technology needs to support health education/promotion
- 5.2.2 Use technology to collect, store and retrieve program management data
- 5.2.3 Apply ethical principles in managing technology resources
- 5.2.4 Evaluate emerging technologies for applicability to health education/promotion

##### **5.3 Manage relationships with partners and other stakeholders**

###### **5.3.1 Assess capacity of partners and other stakeholders to meet program goals**

- 5.3.2 Facilitate discussions with partners and other stakeholders regarding program resource needs
- 5.3.3 Create agreements (for example, memoranda of understanding) with partners and other stakeholders
- 5.3.4 Monitor relationships with partners and other stakeholders
- 5.3.5 Elicit feedback from partners and other stakeholders
- 5.3.6 Evaluate relationships with partners and other stakeholders

##### **5.4 Gain acceptance and support for health education/promotion programs**

- 5.4.1 Demonstrate how programs align with organizational structure, mission, and goals
- 5.4.2 Identify evidence to justify programs
- 5.4.3 Create a rationale to gain or maintain program support
- 5.4.4 Use various communication strategies to present rationale

##### **5.5 Demonstrate leadership**

- 5.5.1 Facilitate efforts to achieve organizational mission
- 5.5.2 Analyze an organization's culture to determine the extent to which it supports health education/promotion
- 5.5.3 Develop strategies to reinforce or change organizational culture to support health education/promotion
- 5.5.4 Facilitate needed changes to organizational culture
- 5.5.5 Conduct strategic planning
- 5.5.6 Implement strategic plan
- 5.5.7 Monitor strategic plan
- 5.5.8 Conduct program quality assurance/process improvement
- 5.5.9 Comply with existing laws and regulations
- 5.5.10 Adhere to ethical principles of the profession

##### **5.6 Manage human resources for health education/promotion programs**

- 5.6.1 Assess staffing needs
- 5.6.2 Develop job descriptions
- 5.6.3 Apply human resource policies consistent with laws and regulations
- 5.6.4 Evaluate qualifications of staff members and volunteers needed for programs
- 5.6.5 Recruit staff members and volunteers for programs
- 5.6.6 Determine staff member and volunteer professional development needs
- 5.6.7 Develop strategies to enhance staff member and volunteer professional development
- 5.6.8 Implement strategies to enhance the professional development of staff members and volunteers
- 5.6.9 Develop and implement strategies to retain staff members and volunteers
- 5.6.10 Employ conflict resolution techniques

- 5.6.11 Facilitate team development
- 5.6.12 Evaluate performance of staff members and volunteers
- 5.6.13 Monitor performance and/or compliance of funding recipients
- 5.6.14 Apply ethical principles when managing human resources

**Area VI: Serve as a Health Education/Promotion Resource Person**

**6.1 Obtain and disseminate health-related information**

- 6.1.1 Assess needs for health-related information
- 6.1.2 Identify valid information resources
- 6.1.3 Evaluate resource materials for accuracy, relevance, and timeliness
- 6.1.4 Adapt information for consumer
- 6.1.5 Convey health-related information to consumer

**6.2 Train others to use health education/promotion skills**

- 6.2.1 Assess training needs of potential participants
- 6.2.2 Develop a plan for conducting training
- 6.2.3 Identify resources needed to conduct training
- 6.2.4 Implement planned training
- 6.2.5 Conduct formative and summative evaluations of training
- 6.2.6 Use evaluative feedback to create future trainings

**6.3 Provide advice and consultation on health education/promotion issues**

- 6.3.1 Assess and prioritize requests for advice/consultation
- 6.3.2 Establish advisory/consultative relationships
- 6.3.3 Provide expert assistance and guidance
- 6.3.4 Evaluate the effectiveness of the expert assistance provided
- 6.3.5 Apply ethical principles in consultative relationships

**Area VII: Communicate, Promote, and Advocate for Health, Health Education/Promotion, and the Profession**

**7.1 Identify, develop, and deliver messages using a variety of communication strategies, methods, and techniques**

- 7.1.1 Create messages using communication theories and/or models
- 7.1.2 Identify level of literacy of intended audience
- 7.1.3 Tailor messages for intended audience
- 7.1.4 Pilot test messages and delivery methods
- 7.1.5 Revise messages based on pilot feedback
- 7.1.6 Assess and select methods and technologies used to deliver messages
- 7.1.7 Deliver messages using media and communication strategies
- 7.1.8 Evaluate the impact of the delivered messages

**7.2 Engage in advocacy for health and health education/promotion**

- 7.2.1 Identify current and emerging issues requiring advocacy
- 7.2.2 Engage stakeholders in advocacy initiatives
- 7.2.3 Access resources (for example, financial, personnel, information, data) related to identified advocacy needs
- 7.2.4 Develop advocacy plans in compliance with local, state, and/or federal policies and procedures
- 7.2.5 Use strategies that advance advocacy goals
- 7.2.6 Implement advocacy plans
- 7.2.7 Evaluate advocacy efforts
- 7.2.8 Comply with organizational policies related to participating in advocacy
- 7.2.9 Lead advocacy initiatives related to health

**7.3 Influence policy and/or systems change to promote health and health education**

- 7.3.1 Assess the impact of existing and proposed policies on health
- 7.3.2 Assess the impact of existing and proposed policies on health education
- 7.3.3 Assess the impact of existing systems on health
- 7.3.4 Project the impact of proposed systems changes on health education
- 7.3.5 Use evidence-based findings in policy analysis
- 7.3.6 Develop policies to promote health using evidence-based findings
- 7.3.7 Identify factors that influence decision-makers
- 7.3.8 Use policy advocacy techniques to influence decision-makers
- 7.3.9 Use media advocacy techniques to influence decision-makers
- 7.3.10 Engage in legislative advocacy

**7.4 Promote the health education profession**

- 7.4.1 Explain the major responsibilities of the health education specialist
- 7.4.2 Explain the role of professional organizations in advancing the profession
- 7.4.3 Explain the benefits of participating in professional organizations
- 7.4.4 Advocate for professional development of health education specialists

7.4.5 Advocate for the profession

7.4.6 Explain the history of the profession and its current and future implications for professional practice

7.4.7 Explain the role of credentialing (for example, individual, program) in the promotion of the profession

7.4.8 Develop and implement a professional development plan

7.4.9 Serve as a mentor to others in the profession

7.4.10 Develop materials that contribute to the professional literature

7.4.11 Engage in service to advance the profession