

## **California TB Program Communicable Disease Investigator Workforce Development Project**

### **Introduction**

In 2007, the California Department of Public Health (CDPH), Tuberculosis Control Branch (TBCB) issued a Communicable Disease Investigator (CDI) duty statement, complementary core competencies, a CDI capabilities assessment, and a CDI training module curriculum. The purpose of these resources is to offer concepts for CDI standardization. The resources are designed to help guide local TB programs' efforts to develop a CDI job classification, evaluate current CDI job specifications, and support competency-based training and professional growth of CDIs in TB control.

These materials were developed by the CDPH TBCB and the Curry International TB Center (CITC) with oversight and consultation from an interdisciplinary advisory group. In 2006, the advisory group included representatives from the California TB Controllers Association (CTCA) Nurses and Allied Health Professionals Forum (NAHPF), California Public Health Nursing Directors, CDPH Sexually Transmitted Disease (STD) Branch, TBCB and STD Branch field staff; University of California (UC) Berkeley Center for Infectious Disease Preparedness, and the University of California, San Francisco (UCSF) Center for Health Professions. Local TB program advisory group members collectively represented low, medium, and high morbidity jurisdictions.

### **Background on Communicable Disease Investigators**

CDIs have been used for over a half century as part of communicable disease control to assist with infectious diseases interventions (e.g. syphilis, TB, HIV, vaccine-preventable illnesses, H1N1, Ebola). CDIs perform technical and investigative activities that do not require nursing-level clinical training and skills. In 2006, a statewide survey of local TB programs identified training needs of CDIs working in California. General findings from the 34 responding TB programs included:

- Roles and/or contributions of CDIs were unclear
- CDI duties and supervision varied among local TB programs
- Need for training methodologies, materials, and length of training sessions were near consensus among respondents
- Counties using CDIs indicated that career advancement, cross training, and expanding CDI duties are planned
- Wide range of job titles, overlapping job responsibilities, and positions are used across local health jurisdictions

## **CDI Workforce Development Tools**

### **Duty Statement**

The duty statement summarizes the scope of CDI practices and lists typical CDI core and supporting duties. It also identifies the qualifications, essential knowledge and abilities, and important attributes of CDIs in TB control.

The qualifications suggest a stepwise progression from entry-level to journey-level CDI classification. These levels are based on the understanding that most newly hired CDIs do not have prior CDI experience and that some level of academic achievement is optimal to ensure CDIs can perform the critical thinking and analysis that is essential to performing effective field and contact investigations.

The duty statement represents the minimum duties and requirements for CDIs in TB control. The CDI duties and qualifications are meant to complement the duties typically carried out by front line public health nurses and other allied health professionals. These duties reflect the CDI's role and responsibilities as a member of a multidisciplinary TB team.

The duty statement was developed with the recognition that CDI duties vary widely across LHDs. The intention is that local programs may modify this document to meet the local needs, help create a CDI job classification, or evaluate their current resources.

### **Core Competencies**

The CDI TB core competencies parallel the CDI duty statement and are meant to illustrate the skills necessary to carry out the responsibilities of this job classification. The competencies were adapted from a list developed by the Council on Linkages between Academia and Public Health Practice that was reviewed by over 1000 public health professionals.

The core competencies are categorized as general or TB-specific. General competencies are cross-cutting and necessary for the performance of all CDI job responsibilities. These competencies are listed under the following four domains:

- Communication
- Cultural Competency
- Community Dimensions of Practice
- Team Skills

TB-specific competencies represent the skills necessary to carry out specialized CDI TB roles and responsibilities. Competencies are grouped under each of the major responsibility areas of the CDI Duty Statement and are divided into the following

three domains:

- Analytic/Assessment skills
- Planning Skills
- TB Control Skills

The competencies are cross-referenced with the duty statement, capabilities assessment, and training curriculum. The core competency document may also be helpful in developing a framework for hiring and evaluating CDI staff.

The core competencies document also contains an extensive reference and resource list.

### **Capabilities Assessment**

The capabilities assessment illustrates the behaviors and skills that CDIs are expected to demonstrate in each of the competency areas. They relate to the core competencies list and major duty headings of the duty statement. The training curriculum focuses on the development of these capabilities as well.

The capability assessment provides capability measures for the general and TB specific core competency categories and indicates the level of mastery for both entry-level and journey-level CDIs. These levels of mastery are reflected in the following categories:

- Aware: Basic level of mastery of the competency. Individuals may be able to identify the concept or skill, but have limited ability to perform the skill.
- Knowledgeable: Intermediate level of mastery of the competency. Individuals are able to apply and describe the skill.
- Proficient: Advanced level of mastery of the competency. Individuals are able to integrate, critique, and teach the skill.

Levels of mastery for entry- and journey-level CDIs are based on the following:

- Entry-Level: Most competencies are ranked as "Aware" since the entry-level qualifications do not require prior CDI experience. The "Knowledgeable" ranking is used mostly for competencies that do not require TB-specific knowledge, but indicate that the candidate has a basic understanding of how to work appropriately with diverse clients in a public health setting.
- Journey-Level: Skills that are central to the CDI position and within its scope of practice are ranked as "Proficient." Competencies related to working as part of the TB Team or knowing particular information are most often ranked as "Knowledgeable."

This assessment may be customized to further define the level of mastery that a TB program expects in each of the core competency areas from CDI candidates, entry-level CDIs, and journey-level CDIs. It may also be adapted or modified to evaluate CDI job performance.

## Training Curriculum

The CDI training curriculum was developed from a variety of resources recommended by the CDI advisory group to promote a core set of skills for staff that perform the duties described in the CDI duty statement. It does not contain material related to every CDI job duty or core competency identified by the project (e.g. placing and measuring tuberculin skin tests). The curriculum focuses on training for the CDI duties that fall within the scope of non-licensed practice. It is divided into sessions that can be conducted as individual stand-alone sessions or in a multi-session series.

The training module curriculum covers the following topics:

1. Contact Investigation
2. Elements of Effective Interviews
3. Interview Outline
4. Field Investigation and Field Safety
5. Adherence and DOT
6. Legal/Ethical Aspects of the CDI Role and Confidentiality
7. Cultural Competence
8. Working with Patients with Special Challenges (Homeless/Substance-using)
9. Patient Education, Infection Control, and Working with Providers and Labs

The content was developed using a variety of resources including materials supplied by or strongly recommended by the CDI advisory group. The training curriculum is designed to develop and reinforce the skills and capabilities that are needed to carry out CDI duties and responsibilities when working as part of the TB team.

**Acknowledgements** – our sincere thanks to the following project contributors:

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