



## HOP OUTREACH REFERENCE MANUAL

### EXCERPTS FROM CHAPTER 3 AND 4

The following two chapters are excerpts from Health Outreach Partners' Outreach Reference Manual (ORM). It is intended to provide readers with the basic guidelines for hiring, supporting, and sustaining an effective outreach team.

#### **Chapter 3: Hiring an Outreach Team**

This chapter provides the basic guidelines for hiring qualified and dedicated outreach staff.

*In this chapter, you will find:*

- Identifying Ideal Qualities and Skills of an Outreach Team
- Job Description Basics
- Interviewing Outreach Staff Candidates
- Staff Orientation

**Chapter 4: Motivating and Retaining an Outreach Team** walks you through how to address three core considerations when striving for staff motivation and retention.

*In this chapter, you will find:*

- Outreach Policies and Protocols
- Ongoing Training & Professional Development
- Motivating Staff

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## CHAPTER 3: HIRING AN OUTREACH TEAM

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### Introduction

No health outreach team can thrive without a staff of dedicated and passionate professionals. They are the lifeline that connects your organization to the community. However, finding a qualified person to add to your outreach team can be challenging. Your time and resources are precious; hiring a less than ideal candidate can cost you extra money and time. By using the following hiring tools and recommendations, your outreach workers will be equipped to build themselves into a highly effective and resourceful team.

To determine what qualities and skills to look for in potential interview candidates, it's important to consider specific job responsibilities.

<b>What are skills?</b>	<b>What are qualities?</b>
<p>A <b>skill</b> is a learned aptitude for accomplishing a task.</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"><li>• Cultural and linguistic competence</li><li>• Communication</li><li>• Teaching</li><li>• Service coordination</li><li>• Advocacy expertise</li><li>• Knowledge of community health needs</li></ul>	<p>A <b>quality</b> is an innate characteristic possessed by an individual. Typically, the qualities you'll seek from potential outreach workers cannot be developed through training, but are naturally instilled within an individual.</p> <p><i>Examples:</i></p> <ul style="list-style-type: none"><li>• Connection to the community</li><li>• Personal strength and courage</li><li>• Respectful</li><li>• Sociable</li><li>• Compassionate</li><li>• Desire to work with the community</li><li>• Persistent</li><li>• Creative and resourceful</li><li>• Enthusiastic</li><li>• Flexible</li></ul>

### ASSESSING THE SKILLS & QUALITIES OF FUTURE OUTREACH WORKERS

As an outreach coordinator or supervisor you must have a sound understanding of what the newest member of your outreach team will mean to both you and your organization. Having answers to question such as those presented in the following sections will make your recruitment efforts more targeted and successful.

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## SAMPLE SKILLS ASSESSMENT

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- 1) Will the candidate need to participate in public speaking engagements?  
 YES  NO
  
- 2) Should the candidate be familiar with cultural competency issues related to the community served by your organization?  
 YES  NO
  
- 3) Will the candidate need to demonstrate an ability to establish relationships with community leaders?  
 YES  NO
  
- 4) Will the candidate need to have strong organizational abilities/data collection skills/technology skills?  
 YES  NO
  
- 5) Should the candidate have established geographic knowledge of the local area?  
 YES  NO
  
- 6) Will the candidate need a specific type of driver's license?  
 YES  NO
  
- 7) Will the candidate need to have a thorough knowledge of insurance options available for patients?  
 YES  NO
  
- 8) Should the candidate know how to conduct basic medical tests, such as diabetes screenings and heart rate checks?  
 YES  NO
  
- 9) Will the candidate need to have strong interpersonal, verbal, and written communication skills?  
 YES  NO
  
- 10) Should the candidate have an existing connection to the community that your organization serves?  
 YES  NO

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## SAMPLE QUALITIES ASSESSMENT

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- 1) Should the candidate have a strong desire to actively improve the health and wellbeing of underserved populations?  
 YES  NO
  
- 2) Should the candidate be self-motivated and independent?  
 YES  NO
  
- 3) Does the candidate have the ability to connect on a human-level with patients?  
 YES  NO
  
- 4) Will the candidate need to adhere to an appropriate and effective set of core values and beliefs in order to succeed at this job?  
 YES  NO
  
- 5) Does the candidate need to have leadership potential, so that they may eventually manage and train staff and volunteers?  
 YES  NO
  
- 6) Is it necessary for the candidate to be an innovative thinker and resourceful problem solver?  
 YES  NO
  
- 7) Will the candidate need to be flexible when it comes to work schedules, types of work to be done, and the ways to do it?  
 YES  NO
  
- 8) Will the candidate be required to possess a strong dedication to collaborative work?  
 YES  NO

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## **JOB DESCRIPTION BASICS**

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Once you understand the skills, qualifications, and requirements needed to perform the outreach worker job successfully, it will be easier to create a job description. Job descriptions should be carefully written; if the job description is haphazardly produced it may result in receiving a pool of candidates who are neither qualified nor interested in the position. The clearer you are with the applicants up front, the more time you will save down the road.

The job description is a well-written statement describing all the particular duties, responsibilities, skills, and qualifications someone will need to possess in order to perform successfully at your organization. It can also contain other pertinent information, such as reporting relationships, schedule, salary potential, and mandatory credentials.

The subsequent pages have some sample job descriptions you may find relevant for your organization. They can also be used to help clarify the outreach team's roles and responsibilities to other staff within your organization. In addition, these job descriptions can highlight the attributes needed by the outreach team to perform their jobs properly. Please feel free to modify these job descriptions to address your organization's specific staffing needs.

The following sample job descriptions have been included:

- Outreach Coordinator
- Outreach Worker / Community Health Worker
- Case Manager

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## SAMPLE JOB DESCRIPTION: OUTREACH COORDINATOR

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This individual will be responsible for the development and implementation of the community outreach program. The outreach coordinator conducts outreach, health education, and case management services to patients (and their families), supervises staff, effectively manages clinic resources, and positively promotes the outreach program through appropriate community outlets. This person will also be responsible for assessing community needs and evaluating the impact of services.

### **Responsibilities Include:**

- Develop and maintain the outreach program infrastructure (plans, policies, procedures)
- Conduct innovative and informative trainings for outreach staff
- Design strategies and measurement techniques to identify community health needs
- Implement a process for documenting, monitoring, and coordinating outreach activities
- Establish positive collaborative relationships with appropriate community agencies
- Coordinate patient appointments; facilitate transportation services as needed
- Act as outreach liaison between administration, clinical, and other department managers
- Supervise team of outreach workers

### **Qualifications and Experience:**

- Bachelor degree with major in medicine, public health, or social service fields
- Masters degree in public health or social services preferred
- Experience within community service, health, social service sector, or other relevant work
- Professional experience working within grassroots program development strongly preferred
- Experience or training in community and/or adult education strongly preferred
- Supervisory experience preferred

### **Skills:**

- Excellent interpersonal communication and writing skills in English and other relevant language
- Strong organizational skills and ability to multi-task

### **Personal Qualities:**

- Ability to relate and connect with people of different cultural, ethnic, and social-economic backgrounds (particularly underserved populations) and a passion for helping others
- Ability to motivate and support outreach team at all times (often in challenging situations)
- Work independently with little supervision and also as a cohesive member of a diverse team

### **Other Requirements:**

- Car, valid driver's license, and proper insurance
- Flexible schedule – may be asked to work some nights and weekends

**Reports To:** Director of Operations

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## **SAMPLE JOB DESCRIPTION: OUTREACH WORKER/COMMUNITY HEALTH WORKER**

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This individual will be responsible for addressing the health and social service needs of patients and their families within the community. The majority of duties will be performed in locations outside the clinic where the patient population is present.

### **Responsibilities Include:**

- Develop means for assessing the overall health needs (both physical and mental) of the local community (i.e., survey tool, focus group discussion guide)
- Create and present culturally-sensitive and competent health education sessions
- Continually update maps and census data within service area
- Document number of patient and community encounters
- Routinely visit with patients and their families to learn details about their health, and offer advice and services to improve it
- Update and maintain clinic's patient database
- Perform other duties as assigned

### **Qualifications and Experience:**

- High school diploma or high school equivalency exam
- Bachelor's degree in health sciences or social service fields preferred
- At least two years experience within community service, health, or social service sector
- Relevant work with underserved populations a plus

### **Skills:**

- Must be fluent in English and other relevant language
- Strong writing and communication abilities
- Exceptional interpersonal skills
- Proficient public speaker

### **Personal Qualities:**

- Demonstrate a passion for helping others
- Ability to relate and connect with people of different cultural, ethnic, and social-economic backgrounds (particularly underserved populations)
- Work independently with little supervision

### **Other Requirements:**

- Car, valid driver's license, and proper insurance
- Flexible schedule – may be asked to work some nights and weekends

**Reports To:** Outreach Coordinator

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## SAMPLE JOB DESCRIPTION: CASE MANAGER

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The case manager will help facilitate health and social service needs to local patients and their families by providing a wide range of case management services. This position requires approximately 40% of time to be spent inside the clinic, and approximately 60% of time outside of the clinic setting where the patient population is present.

### **Responsibilities Include:**

- Enable patients to develop a keen understanding and awareness of available community resources, guiding them through the social support network process
- Help patients more easily access community resources, such as through the provision of interpretation services or by coordinating transportation to the health center
- Provide relevant and easy-to-comprehend information about the physical and mental health services available to the community
- Receive and provide proper referrals (such as medical care, provisions, medicine, and social services), and schedule follow-up appointments as necessary
- Attend relevant community meetings to become familiar with the social and medical services available to the patient population
- Document all patients served using appropriate forms
- Perform other duties as assigned

### **Qualifications and Experience:**

- Bachelor degree with major in social work, public health, or social service fields
- Masters degree in social work or human services preferred
- Case management experience
- Relevant work with underserved populations strongly preferred

### **Skills:**

- Must be fluent in English and other relevant language with excellent interpersonal communication skills
- Strong, up-to-date knowledge on variety of current health topics
- Must have ability to juggle multiple projects

### **Personal Qualities:**

- Ability to relate and connect with people of different cultural, ethnic, and social-economic backgrounds (particularly underserved populations) and a passion for helping others
- Work independently with little supervision

### **Other Requirements:**

- Car, valid driver's license, and proper insurance
- Flexible schedule – may be asked to work some nights and weekends

**Reports To:** Outreach Coordinator



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## INTERVIEWING OUTREACH STAFF CANDIDATES

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There is a limited amount of time during an interview to cover all the topics and areas needed for you, as a hiring manager, to make an informed decision. In order to use your time, and the candidates, wisely you should formulate a well-crafted interview plan. Since you will be investing time, money, and energy into this individual, it is important to prepare yourself for the entire interview process. Revisit the job description you posted and see if anything should be altered. Review each candidate's resume prior to the interview, so that you are prepared to ask intelligent questions about their past experiences. The following are some suggested guidelines to conduct informative and constructive interviews.

### **The Interview Timing and Structure**

Job interviews should typically last no more than one hour. Make sure you cover all the topics you deem important, while allotting some time for the candidate to ask you relevant questions. Most interviews are comprised of three sections: the opening, the body, and the closing.

### **The Opening**

During the first few minutes of the interview try to put the candidate at ease. Interviewing can be a daunting experience for some people; you can alleviate most nervous tension by using a friendly, professional demeanor. You may want to talk about your specific role within the outreach team and health center, as well as the overall mission of your organization. This is also the appropriate time to provide the job candidate with an outline of the hiring process.

### **The Body**

This section constitutes the bulk of your interview. You'll have two primary objectives: learn as much information as possible about the candidate to see if they will be a match within your organization, and convince the candidate that your organization is great place for them to work. Use the candidate's resume as a guideline to structure your interview process. Prepare all of your questions in advance of the interview, taking the necessary time to tailor your questions to the experience level for the open position. Do not be shy asking the candidate to elaborate on their answers; specific details can be what determines who is hired and who is not. Refrain from soliciting questions from the candidate until after you have asked all of the questions you need answered.

### **The Close**

When it is time to conclude the interview, allot five to ten minutes for the job candidate to ask you questions. Most qualified candidates should have several questions to pose to you. Explain who will be making the final employment decision and under what timeline.

### **After the Interview**

Once you have shaken hands and escorted the candidate to the exit, you should summarize the candidate's skills and performance. It may help to create a ranking or evaluation tool in order to measure everyone's various strengths and weaknesses. This process will help you more easily determine which candidate will fit best within your organization.

## **The Offer**

Once you have interviewed and evaluated all the new hire candidates, it is time to extend an employment offer. Be sure to give the selected candidate a fair window of time to accept your offer. Hopefully, they will want to join your organization right away; however, there may be instances where an applicant struggles with whether or not to accept. When this occurs, you can suggest that the applicant shadow one of your current outreach workers to gain a truer sense of the job. It will also save you the time and expense of hiring a worker who, for whatever reason, is not suited to this particular line of work. Be prepared to negotiate if necessary, but do not shy away from rescinding or voiding the offer if an agreement cannot be met in a timely fashion.

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## **SAMPLE INTERVIEW GUIDE**

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### **Position-oriented questions**

- Tell me something about yourself that is not on your resume or cover letter.
- Tell me what you understand about the position and our organization.
- Why are you interested in the position?

### **Experience-related questions**

- What experience do you have in connecting with underserved populations?
- What job-related skills have you developed that are relevant to outreach?
- What three professional skills did you learn from your past work experiences that you can bring to this one?
- What did you enjoy most about your last employment? Least?
- How would you assess your ability to handle stress or high-pressure situations?
- How have you overcome challenging work situations in the past?
- How do you think a former supervisor would describe your work?
- What contributions can you make to the outreach team/department?
- If you were me, would you hire you? Why?

### **Career-oriented questions**

- What kind of qualities in a supervisor do you appreciate?
- How would you describe your ability to work within a team environment?
- Do you prefer large or small organizations? Why?
- What do you think makes a team function successfully?
- How would you assess your ability to multi-task?
- Please describe your work ethic.

### **End of interview questions**

- What questions do you have for me?
- Do you have any references?
- When would you be available to start?

## JOB INTERVIEW SCORING METRIC<sup>1</sup>

Name: \_\_\_\_\_ Date: \_\_\_\_\_ Position: \_\_\_\_\_

Time of Interview: \_\_\_\_\_ Time Arrived: \_\_\_\_\_

<b>Competency</b>	<i>Least Qualified (0 PTS)</i>	<i>Qualified (5 PTS)</i>	<i>Most Qualified (10 PTS)</i>
<b>First Impressions</b>	Shows up late for the interview, does not shake hands, and/or chews gum; does not bring a copy of their resume or references	Shows up on time for the interview with a copy of their resume in hand	Shows up early for the interview with a copy of their resume in hand
<b>Preparation</b>	Knows nothing about the organization or seems to make up information as they go along	Knows some general information about the organization and/or its purpose	Has researched the organization and the position thoroughly
<b>Personal Attributes</b>	Overbearing, overaggressive, egotistical; or shy, reserved, and overly nervous	Somewhat nervous, some lapses in eye contact; speaks too loudly or softly	Good eye contact and poise during interview; confident
<b>General Attitude</b>	Lack of interest and enthusiasm about the position; passive and indifferent; or overly enthusiastic	Seems interested in the position but could be better prepared or informed on certain topics	Interested in the position and enthusiastic about the interview
<b>Responses</b>	Answers with "yes" or "no" and fails to elaborate or explain; talks negatively about past employers	Gives well-constructed responses, but sounds rehearsed or unsure	Gives well-constructed, confident responses that are genuine
<b>OVERALL</b>			

<sup>1</sup> Adapted from <http://lessonplans.btskinner.com/jobrubric.html>  
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## STAFF ORIENTATION

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When a new member joins your outreach team, you'll want to incorporate them into the day-to-day routine of your organization. Orientation programs encourage program uniformity, set expectations, and ease your newest team member into their new work environment. Oftentimes, employee orientations are spread out over a week or two. This tends to work better than overloading the new hire with an abundance of information over a few days.

During the orientation program set a tone of professionalism and pride for the new employee. The orientation process is your time to motivate the newest outreach team member to be successful. Below are some elements that you can consider incorporating into your orientation program; however, be sure to tailor these suggestions to your own program's specifications and needs.

### **Capture the New Employee's Energy**

When a new person joins, they will bring additional perspective, dynamic, and energy to your outreach team. You should try to harness this zeal, directing it towards effective work planning and management.

### **Make Your New Employee Feel at Home**

The last thing you want to do is spend time and resources hiring a new person, only to have them quit within the first three months. By developing an effective orientation program, the newest member of your outreach team should feel as though they are part of the team, and immediately valued within the organization. Therefore, make sure all members of your outreach team are informed about the start date and background of the new hire. Encourage them to extend warm greetings and be available for questions. You may also want to organize a special team luncheon to welcome the newest member on their first day.

### **Help the New Employee Become a Productive Outreach Team Member as Quickly as Possible**

An orientation is held so that each new employee will become a valued contributor to your organization's outreach goals. It is not designed merely for a new hire to "learn the ropes." You can help accelerate the orientation process by taking care of some basic logistical and human resource procedures, like: creating user identifications for computers, email addresses, passwords, assigning employee hand books, ID cards, tax forms, and benefit forms.

### **Show the New Employee the Big-Picture of Your Organization**

Though the outreach worker's job is connecting with patients in the community, it is also important that they understand how other departments and positions relate to their work. You may also want to assign a mentor to partner up with the new employee. This also gives someone on your existing outreach team the opportunity to demonstrate leadership by acting as an advocate for the new hire.

### **Continually Stress the Importance of Your Organization's Mission**

Be sure to emphasize your organization's commitment to improving the health of patients and their families during the new hire orientation. In addition, share how your organization is perceived throughout your local community. If you operate an established outreach program, odds are you have improved the lives of many patients within your community. Sharing anecdotes of how community members view your outreach team will motivate the new hire.

### **Review Internal Procedures**

Much of the time a new employee will ask fairly fundamental questions during their orientation, such as sick day policies, dress code, vacation time, and pay periods. Be sure to take some time to acquaint your newest outreach team member to your organization's internal personnel policies. If your organization has a human resource department it's a good idea to invite a representative to this part of the orientation.

### **Don't Ignore the Basics**

Your office may feel like a second home to you at times, but remember, this is the first time the new employee has spent any considerable length of time here. Take them on a tour of your organization, and highlight essentials such as bathrooms, conference rooms, and break rooms. If necessary, you should also cover such items as how to lock up the facilities and emergency procedures.

### **Immediately Initiate the Outreach Training**

Learning how to connect with the community begins on the first day of orientation. When this training occurs, it is important to include members of your current outreach team as they have invaluable experience to share. Throughout the orientation period, plan to expose your new team member to community outreach work on a daily basis, perhaps scheduling tours to your patient population. You may also want to introduce the new outreach team member to various community partners and program collaborators. The key step is to encourage your new hire to start their work responsibilities from day one; promote fostering relationships with patients as soon as possible.

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## SAMPLE ORIENTATION SCHEDULE FOR NEW OUTREACH STAFF

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### DAY 1: (day of the week), (date)

#### **9:00 – 9:30                      Welcome and Overview**

*Objective: Participants and facilitators will get to know each other and understand the orientation purpose.*

- Introductions
- Expectations of new job
- Overview of orientation

#### **9:30 – 10:30                      Introduction to (Organization's Name)**

*Objective: Participants will gain a greater knowledge of (Organization Name) and its role in providing services to the community.*

- Mission, goals, and core values
- Organization's history
- Organization's staff structure
- Current projects and future plans

#### **10:30 – 12:00                      The Patient Population**

*Objective: Participants will develop a greater breadth of knowledge of health issues facing the community that the health center serves.*

- Who does the health center serve?
- What are the common health problems of the patient population?
- What barriers does this population face in accessing health care?

#### **12:00 – 1:00                      LUNCH**

#### **1:00 – 3:00                      Community Outreach**

*Objective: Participants will identify the roles they play as outreach workers and consider their actions when faced with ethical dilemmas.*

- Definition of outreach
- Review of outreach manual
- Ethics in community outreach

#### **3:00 – 3:30                      Overview of Employee Handbook**

*Objective: Participants will be familiar with the general contents of the (Organization's Name) employee handbook and major policies.*

- Policies and Benefits

#### **3:30 – 5:00                      Documentation and Administrative Responsibilities**

*Objective: Participants will know which administrative forms and reports they are responsible for, when they should be submitted and how to fill them out.*

- The organization's work plan
- Monthly statistics
- Narrative report
- Time sheets, expense sheets and others

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## ORIENTATION SCHEDULE FOR NEW OUTREACH STAFF, CONTINUED

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### DAY 2: (day of the week), (date)

#### **9:30 – 12:00                      Health Education**

*Objective: Participants will be familiar with the content of the health education manual and will learn about the type of health education (Organization's Name) provides to patients and the community.*

- Overview of the organization's health education manual
- Health education objectives
- Health education activities

#### **12:00 – 1:00                      LUNCH**

#### **1:00 – 1:30                      (Organization's Name) Associated Agencies**

*Objective: Participants will understand the nature of (Organization's Name) relationship to other community health agencies.*

- (Organization's Name) funding, contracting and placement process
- Working with associated agencies

#### **1:30 – 2:00                      Life as an (Organization's Name) Field Staff Professional**

*Objective: Participants will have a greater understanding of what to expect from their position with (Organization).*

- Questions and discussion regarding relocation, personal vs. professional life, inter-department support and other related matters

#### **2:00 – 3:00                      Wrap-up**

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## CHAPTER 4: MOTIVATING & RETAINING AN OUTREACH TEAM

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### Introduction

Successfully motivating and retaining your outreach team is important and feasible for any organization, and can be approached in a variety of ways. By prioritizing motivation and retention of your staff, you create a supportive work environment that ultimately contributes to the longevity of programs and sustained relationships with your patients and the community. Despite these aims, even when staff eventually move on, their positive experiences and skills will inevitably be shared forward.

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### WHY STRIVE TO MOTIVATE AND RETAIN YOUR OUTREACH STAFF?

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Retention is practical and much more than a “feel good” issue. Retaining good employees:

- **Maintains Knowledge and Skills within the Organization.** When outreach staff leave your organization loses some of its institutional knowledge and acquired skills.
- **Creates Continuity with Programs and the Communities You Serve.** Outreach staff who are inspired to stay and potentially grow their career with an organization develop an ongoing understanding of a program as well as the communities it serves.
- **Fosters a Positive Work Environment and Client Satisfaction.** When you invest in staff (both financially and otherwise), they in turn are more inclined to invest in the organization, team, and work. Outreach staff who are satisfied with their work and their organization are more likely to create satisfied patients.
- **Minimizes Expenses.** Turnover generates costs. When staff leave, three types of costs are involved: 1) Direct expenses, including those associated with recruiting, interviewing, and training replacements; 2) Indirect costs that may effect workload, morale, and client satisfaction; and 3) Opportunity costs, including lost knowledge and the work that doesn't get done while managers and other employees focus on filling the slot and bringing the replacement up to speed.<sup>2</sup>

Despite these critical points, you must not strive to reduce turnover at all costs. Change is bound to occur, and many times it can bring positive outcomes. Periodic turnover has the potential to create vacancies you can use to move deserving employees up the career ladder. The same vacancies represent opportunities to bring new people with new skills and different experiences into the organization.<sup>3</sup>

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<sup>2</sup> *Manager's Toolkit: The 13 Skills Managers Need to Succeed.* Harvard Business School Press. 2004.

<sup>3</sup> *Ibid.*



## Why do Outreach Staff Stay at an Organization?

Outreach staff stay at an organization for many different reasons. The major motivations for staying include:

- **Pride in the organization.** Outreach staff want to work for well-managed organizations led by effective supervisors and administrators.
- **A respected supervisor.** The employee-supervisor relationship is very important and is more likely to endure over time if outreach staff feel respected and supported. As a supervisor, this is the factor in which you will have the greatest influence for boosting retention.
- **Fair compensation.** Outreach staff also want to work for organizations that offer fair compensation. In addition to competitive wages and benefits, this includes opportunities to learn, grow, and achieve. Although your control of wages may be limited, you can compensate the people you want to retain with other types of “compensation.”
- **Affiliation.** Many outreach staff consider the opportunity to work with respected and compatible co-workers as another significant reason to stay at an organization.
- **Meaningful work.** Outreach staff want to work for organizations that allow them to respectfully and effectively serve their communities. Satisfying and stimulating work makes all of us more productive.<sup>4</sup>

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<sup>4</sup> *Manager's Toolkit: The 13 Skills Managers Need to Succeed.* Harvard Business School Press. 2004.  
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## OUTREACH POLICIES AND PROTOCOLS OVERVIEW

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Developing and adhering to policies and protocols play a key role in staff retention and motivation by helping people to understand organizational expectations about their roles and responsibilities. They also formalize systems by enabling your team to conduct outreach consistently, which is critical to ensuring quality. There are specific policies and protocols that will likely need to be customized for the outreach setting, including: guidelines on providing care, managing patient interactions, safety precautions, referrals, and handling equipment and materials.

What are policies?	What are protocols?
A policy answers the question, “What do I need to know?” It includes guidelines and standards.  <i>Example:</i> Vacation policy – Everyone gets three weeks off each year.	A <b>protocol</b> answers the question, “How do I do something?” It includes tasks, action steps, and how to guides.  <i>Example:</i> Instructions on how to request a day off of work.

Policies and protocols can be used to:

- **Define** the roles and responsibilities of each outreach team member
- **Ensure** the safety of the team while in the outreach setting
- **Maintain** confidentiality of the patients
- **Protect** continuity of services in case of sick, absent or new staff members
- **Handle** potential problems and liability concerns that could arise when providing outreach services

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## WHAT ARE THE STEPS FOR DEVELOPING POLICIES AND PROTOCOLS?

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### Step 1 → Getting Started

#### Revisit Goals and Objectives

Review the goals and objectives of both your organization and your outreach program to make sure that they are in alignment.

#### Brainstorm Topics

Imagine if you were responsible for managing the outreach program and had no information to review or consult. What would you need to know to understand and carry out the work of your outreach program? Consider the following:

- **Services.** What services and annual activities are provided? How are they conducted? How are these activities determined? How should outreach staff address emergency situations?

- **Data.** What data does your program collect? How often? Who participates in the data collection? What forms are used? What about confidentiality?
- **Partnership.** Which departments does your program collaborate with? How do you work together? How do you work with other health and social service agencies?

### **Finalize Topics**

Work with key stakeholders in the outreach program including representatives from executives, clinical, and/or outreach staff to collectively agree on topics.

## **Step 2 → Drafting and Finalizing**

### **Standardize Format**

Make sure the outreach policy and protocols template matches the structure and format of the others in your organization.

### **Create Draft**

Follow existing organizational guidelines on who is to draft them. If these don't exist, who is best suited to do this? Make sure that the authors are aware of other related existing policies and protocols.

### **Review and Finalize**

Follow existing organizational guidelines on the proper staff to review policies and protocols. If these do not exist, make sure appropriate staff are involved in reviewing draft versions. Finalize them accordingly.

## **Step 3 → Getting Approval**

If they exist, follow organizational guidelines on approving policies and protocols. Some organizations require the administrative team to approve all policies and protocols, while other organizations require that department heads develop and approve them within their own departments.

## **Step 4 → Distributing**

Ensure that outreach staff have a good understanding of policies and protocols, and that any questions and concerns about them are addressed by leadership. Think about offering a training when instituting or revising anything. Further, make sure that policies and protocols are accessible to all staff. Distribute and store them in user-friendly locations, for example: in three-ring binders or on an organizational server. Consider saving them in .pdf format to ensure that they cannot be altered. Announce to other departments that these policies and protocols have been completed and how they can be accessed.

## **Step 5 → Updating**

### **Schedule Review Period**

Find out if and when the other programs conduct an annual review. If your organization reviews all policies and protocols at the same time each year, conduct your review at the same time and follow the same steps as the other programs or departments. If not, determine the best time of year for your outreach policies and protocols to be reviewed and updated. Schedule a review for the same time every year. Choose a time of year that is the least busy for your outreach program.

### **Document Review Date**

State on each policy and protocol “Updated (month)/(year)” each time you conduct a review, and include a blank that states “Next review due (month)/(year)”.

### **Replace Existing Policies and Protocols**

If you have not made any changes after completing a review, they still must be replaced to show the last review date. You can also put an update sheet at the front.

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## SAMPLE CLINICAL OUTREACH PROTOCOL

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**POLICY TITLE:** Safety Protocols for Clinical Outreach Team  
Sunnydale Health Center  
*Updated January 2015*  
*Next Review Due January 2016*

**POLICY STATEMENT:** The safety of the Sunnydale Health Center (SHC) staff or designated representatives during clinical outreach is a high priority and the responsibility of each team member. In accordance with SHC's policies and standards, each team member is required to adhere to the safety protocols put forth during clinical outreach in order to prevent or minimize any harm occurring to team members, patients, and other bystanders.

This policy applies to all clinicians, outreach workers, social service providers, and volunteers who enter and work in SHC's clinical outreach designated areas, including: the mobile van, fixed sites, on the streets, in camps and housing units, and any other relevant sites for clinical outreach.

**PROTOCOL:**

**1) Purpose:**

- To maintain the safety of the SHC's staff during clinical outreach
- To prevent or minimize any harm occurring to staff and patients during clinical outreach

**2) Steps:**

- The clinical outreach team must develop a safety action plan ("The Plan"). A hard copy of The Plan must be on the mobile van each time clinical outreach is conducted.
- Each clinical outreach team member ("The Team") must complete a training on The Plan. The Team must follow the protocols outlined in The Plan.
- Maintaining communication among The Team is required during clinical outreach.
- A safety word ("The Code") will be used by any member of The Team in a circumstance or situation where any team member is feeling unsafe. Once The Code is used, The Team will gather and leave the site immediately.
- Each team member must inform the team leader of their activities, particularly if he/she is leaving to conduct services outside the mobile van.
- There must always be at least 2 team members in the mobile van at all times. Permitting only one team member to remain in the mobile van alone is a violation of SHC's safety policies. There must always be at least 2 team members traveling together when visiting sites on foot and on the streets.
- All team members must wear their name badges visibly on their person during clinical outreach.

Failure to adhere to SHC's safety protocols during clinical outreach is deemed a violation of SHC's policies. Those in violation are subject to disciplinary action up to and including termination.

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## **SAMPLE OUTREACH POLICY AND PROTOCOL TEMPLATE**

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**POLICY TITLE:**

**POLICY STATEMENT:**

**PROTOCOLS:**

**A. Purpose(s):**

**B. Steps:**

**1.**

**2.**

**3.**

**4.**

**KEY DEFINITIONS (OPTIONAL)**

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## ONGOING TRAINING & PROFESSIONAL DEVELOPMENT

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By being proactive and offering professional development training on an ongoing basis, staff will be able to work to their full potential and meet the changing demands of your program and communities. Additionally, training opportunities that are responsive to staff needs are integral to providing effective services to your communities. When staff experience this investment in their potential they are more likely to return the investment by staying with the organization longer and being more motivated.

Training can be tremendously advantageous for your organization. You can improve customer services, productivity, motivate your staff, and keep your operation current. Remember to analyze your needs at the outset and choose the right type of training for your requirements.

### **Assessing Staff Training and Professional Development Needs**

Before launching training efforts you'll want to assess training needs. Below are four areas to consider when assessing your staff's training needs.

#### **Internal Assessment**

Make a point to regularly discuss professional development needs during individual check-in meetings or staff meetings. Alternatively, consider creating a short written survey where staff can identify their key needs.

#### **Organizational Changes**

Has some aspect of your organization changed? For example, suppose your organization's approach to documenting information has changed. Employees are more accepting of change if they receive adequate training in how to effectively address changes.

#### **Feedback**

Using information from patient satisfaction surveys or other organizational sources may allow you to discover hidden training needs that translate into opportunities to improve service delivery.

#### **Errors, Complaints, and Frequent Problems**

Receiving complaints from clients or staff does not necessarily indicate an employee is a lost cause. Perhaps there is a deficiency that could be easily rectified with training. When errors or complaints are brought to your attention analyze the problem to see if training might be the solution.

### **Developing/Implementing Outreach Staff Training**

There are various strategies for creating and implementing outreach staff training responsive to the professional development needs of your staff. The specific content and approach used to

present your training will depend on the needs identified by your staff as well as the persons best suited to address the topic(s). Possible strategies for trainings include:

- **Evaluate internal expertise and resources and use non-outreach staff to lead trainings.**  
Example: Consider working with health educators to train outreach staff on a particular topic. Consider including providers as a key resource for providing continuing education and professional development for staff, particularly in regards to key health education topics and basic clinical skills.
- **Have experienced outreach staff provide a training to new outreach workers.**  
Example: Experienced outreach staff members can take an instrumental role providing trainings for newer outreach staff. They can share insights on the local community and their needs, while also providing invaluable information on essential outreach skills like referral processes, planning a health education session, or conducting screenings.
- **Have outreach staff provide trainings to the other non-outreach staff.**  
Example: Outreach staff can be a great internal training resource particularly when it comes to sensitizing staff to the cultural beliefs, practices, and attitudes of the local community. Involve outreach staff in providing professional development to the rest of the staff around cultural competency and sensitivity.
- **Collaborate with other organizations to obtain trainings.**  
Example: Organize staff and interested community partners to solicit training on how to conduct needs assessments.
- **Work with external technical assistance organizations to visit your organization and provide trainings.**  
Example: Utilize HOP's training services including: *Cultural Humility in Health Outreach, Program Planning and Evaluation of Health Outreach Programs, Conducting a Community Health Needs Assessment, or Building Basic Outreach Skills.*
- **Work with community members and/or other service providers to provide a training or information exchange session.**  
Example: Exchange experience and tips with other health centers and organizations that have conducted successful activities among their local community. This could involve sharing strategies and lessons learned around any topic that has collective importance.

## **Types of Certification Relevant to Outreach Staff**

Certification brings recognition to outreach staff for their work in the community. Certification recognizes their diverse skills and acknowledges their training and work experience, and has the potential to further education and career goals. Some specific certifications to consider include: Certified Health Education Specialist (CHES), First Aid/CPR Certification, Diabetes Screening Certification, Nutrition Educator Certification, Immunization Educator Certification, and Translation/Medical Interpretation.



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## MOTIVATING STAFF

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Although motivation is a recurring theme throughout this chapter this section consists of specific strategies for motivating your staff. From team building to incentives, various approaches to inspire your staff are suggested here. Consider selecting a few from the menu of possibilities below and find out what dimension they can add to your team spirit.

### Teams and Team Building

Being part of a cohesive team is one critical component to keeping staff motivated. A team is a group organized to work together to accomplish a set of objectives or goals. Well-functioning teams demonstrate the following key characteristics.

- **Purpose.** Members proudly share a sense of why the team exists, and are invested in accomplishing its mission and goals.
- **Priorities.** Members know what tasks need to be accomplished next, by whom, and by when to achieve team goals.
- **Roles.** Members know how to complete tasks and when to allow a more skillful member to undertake a certain task.
- **Decisions.** Authority and decision-making lines are clearly understood.
- **Conflict.** Conflict is dealt with openly and is considered important to decision-making and personal growth.
- **Personal Traits.** Members feel their unique personalities are appreciated and well utilized.
- **Norms.** Group norms for working together are set and seen as standards for everyone in the group.
- **Effectiveness.** Members find team meetings efficient and productive, and look forward to this time together.
- **Success.** Members know clearly when the team has succeeded and they share in this equally and proudly.
- **Training.** Opportunities for feedback and updating skills are provided and taken advantage of by team members.

In order to creatively foster a cohesive and well-functioning team many organizations use team-building activities. Listed below are sample activities that could be the foundation for a team-building retreat. They are divided into “Brief” and “Extended” categories.

## Brief Activities

These fun activities can be incorporated into regular meetings or staff retreats. They are intended to last no more than thirty minutes. If time permits, consider debriefing on the activity. How did the activity go? What did the activity demonstrate about effective teamwork?

- **Quote Matching**  
On a piece of paper list a variety of quotes by famous people on topics like teamwork. Separately, list the names of the individuals who coined the quotes. Have the staff work together or in small groups to match the names with the quotes.
- **Organizational Trivia**  
Come up with a simple questionnaire made up of True/False questions and fill-in-the-blank statements about your organization. Have participants complete the questionnaire individually or in small groups. Discuss the responses.
- **Two Truths and a Lie**  
Participants think of three sentences, two are facts and one is a lie. One by one, participants introduce themselves and say their three sentences. The rest of the group has to guess which one is a lie.

## Extended Activities

These activities are also intended to build camaraderie and cohesiveness among team members, but will require a couple of hours or longer. Here are a few suggested activities:

- **Host a Potluck**  
Have participants contribute a dish to a potluck that takes place in a less formal setting, like a staff member's home. They should strive to bring a dish that has significance to them and should explain this at the event. Alternatively, have staff work together on a menu and then divide up the roles.
- **Special Project**  
Have staff organize a special project for your organization or the local community. This may include a special health fair, a presentation, a sporting event, or a kick-off event that marks the beginning of the open enrollment season. Alternatively, this could include volunteering at another community agency or planning a community service project.
- **Group Norms**  
Group norms are generally agreed-on informal rules that guide all members' behavior in the group. They are behaviors that each group members agrees to follow to the best of their abilities. Work with your team to create a set of 4-5 group norms on how you generally intend to work together. Make sure everyone gets a copy of this resource.

## Staff Recognition and Incentives

Although offering a competitive and fair wage is a critical component of recognizing a staff member's hard work, there are other non-monetary strategies to consider as well.

- **Involve staff in decision-making.**  
When appropriate, recognize the important role and voice of staff by encouraging them to contribute their feedback on decisions. This fosters increased ownership in the program and its overall goals and objectives. Additionally, this input can be extremely valuable to management staff, assisting them in their ability to keep the pulse on staff needs and observations.
- **Add a “kudos” component to staff meetings.**  
Incorporate a “kudos” segment to meetings in which staff can recognize each other for assistance received or a job well done.
- **Know your staff's limits.**  
Your staff work hard, particularly during specific periods such as open enrollment. Dedicated outreach workers, especially those who are new, are liable to run themselves down, unaware of their own productivity curve. As a manager you may need to give staff time off, even when they do not think they need it.
- **Provide opportunities for staff recognition.**  
Consider providing opportunities for outreach staff recognition (ex: “Outreach Worker of the Month,” certificates of appreciation, etc.) or incentives such as a celebratory gathering for the entire team following a peak work period.
- **Provide training and educational opportunities.**  
As mentioned earlier, provide staff with training and educational opportunities. Not only do staff members gain valuable skills, but they recognize your organization's investment in their professional growth.
- **Offer a compressed workweek option.**  
Flexible work schedules are intended to enhance performance while allowing employees a more enjoyable work/life balance. They should not interfere with the efficient and effective functioning of outreach at your organization. Employees choosing a compressed workweek option work 80 hours over 9 days in each 2-week pay period. This will generally work out to eight 9-hour days, one 8-hour day, and one day off every two weeks. Employees may also choose to work four 9-hour days and one 4-hour day per pay period. This type of scheduling may be especially useful when staff are expected to work extended hours to conduct evening outreach activities.