SUPERVISION MANUAL

FOR *PROMOTOR(A) DE SALUD*

PROGRAMS

MHP Salud

ABOUT MHP SALUD:

MHP Salud implements Community Health Worker programs to empower underserved Latino communities and promotes the CHW model nationally as a culturally appropriate strategy to improve health.

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FOREWORD

This Supervision Manual was developed to provide basic guidelines of personnel management to supervisors of *Promotor(a) de Salud* programs. This Manual is intended for a diverse range of supervisors of *Promotor(a)* programs, ranging from newly-hired to experienced Program Coordinators, Program Directors, or Outreach Coordinators. Regardless of the position and the person's experience, we hope the information in this Manual proves helpful in learning about and managing the successes and challenges of working with *Promotores(as)*.

MHP Salud has been developing, implementing, and innovating upon *Promotor(a) de Salud* programs since 1985. While the Manual is based on this extensive experience, it is by no means an exhaustive review of supervision as a whole. Additionally, the information in this Manual reflects MHP Salud's expertise implementing *Promotor(a)* programs with Latino populations; however, it can be adapted to fit the needs of any program. We hope and trust that you will use your own experiences and insights to complement the concepts presented here.

The Manual is divided into six main sections:

- Section 1: Introduction
- Section 2: Recruiting and Hiring *Promotores(as)*
- Section 3: Orientation and Training
- Section 4: Supervision
- Section 5: Common Challenges and How to Handle Them
- Section 6: Review and Conclusion

At the end, you will find an Appendix with additional information and sample forms.

We hope this Manual will serve as a useful tool in building or strengthening programs!

SECTION

1

INTRODUCTION

PROMOTOR(A) PROGRAM OVERVIEW

Promotores(as), or Community Health Workers, are community members who promote health within their own communities. As members of minority and underserved populations themselves, they are able to use their deep understanding of the community and the obstacles it faces to address unmet health needs in their communities. They provide leadership, peer education, support, and resources to the community. Many *Promotor(a)* programs focus on serving the needs of specific ethnic or racial groups, while others focus on vulnerable segments of the population or prominent health problems.

Promotores(as) is a term used to refer to Community Health Workers working with Latino populations. However, organizations have used a number of different titles for *Promotores(as)*, including:

- Camp Health Aides
- Peer Health Educators
- Lay Health Advisors
- Outreach Workers
- Community Health Representatives
- Non-Traditional Health Workers

With the appropriate resources, training, and support, *Promotores(as)* improve the health of their communities by linking their neighbors to health care and social services, by educating their peers about relevant health topics, by working to make available services more accessible and culturally competent, and by mobilizing their communities to create positive change.

PROMOTOR(A) ROLES AND RESPONSIBILITIES

The nature of the roles, responsibilities, and duties of *Promotores(as)* vary considerably from program to program. Paid, contracted, and/or volunteer *Promotores(as)* may work part- or full-time at clinics, nonprofit organizations, public health departments, or other organizations. *Promotores(as)* may be assigned to conduct outreach and health education in clients' homes, community centers, clinics, hospitals, schools, worksites, shelters, or migratory and seasonal agricultural worker labor camps. Although *Promotores(as)* engage in a broad range of activities, they share a number of common roles. *Promotores(as)* can provide:

- Culturally competent health education
- Capacity building on individual and community levels
- Communication between communities and health and human service agencies
- Cultural mediation
- Informal counseling and support
- Advocacy for individuals or communities
- Direct services
- First aid and emergency assistance
- Home-based support
- Health promotion/coaching
- System navigation
- Outreach and community mobilization
- Case management and care coordination
- Participatory research

(New York State Community Health Worker Initiative, 2011; Rosenthal et al., 1998)

As a supervisor, it is your job to ensure that the *Promotores(as)* have all of the support and resources they need to flourish in any of their assigned roles.

SUPERVISOR'S ROLES AND RESPONSIBILITIES

Specific duties of a supervisor can vary by organization, but certain roles or tasks are part of every supervisor's job. They include:

- Basic management tasks, such as decision making, problem solving, and planning
- Recruit and hire *Promotores(as)*
- Develop and facilitate trainings on health education, health promotion, advocacy, leadership, and documentation skills
- Organize and coordinate program details and logistics, and delegate the

work to the appropriate individuals and/or teams

- Support each *Promotor(a)* in building professional skills, as well as setting and accomplishing professional goals
- Track *Promotor(a)*'s performance through their progress on program goals, and observe and give regular feedback on performance through regular supervision meetings
- Assist *Promotores(as)* in identifying health needs and defining appropriate methods of creating individual and community changes
- Collect, record, and compile program data from *Promotores(as)*
- Ensure that all employees, including yourself, abide by personnel policies, rules, laws, and other regulations
- Adjust job descriptions, program requirements, and assigned work and expectations as needed
- Compose program reports as needed

Your responsibilities are prioritized by several factors. **Figure A** is a graphic that illustrates these factors by the order of importance, with the most important items building the base of the pyramid. Some of these items are internal to your organization and some are external, or come from outside your organization. When confronted with a difficult decision or challenges in balancing your many responsibilities, this pyramid can provide guidance on how to prioritize activities, responsibilities, and difficult decisions.

Figure A – Supervisor's Priorities

All of the boxes contain information that might change regularly. As a supervisor, your responsibility is to keep on top of these changes as they occur by being familiar with program goals and objectives, referring back to the documents as necessary, and asking your supervisor if you have questions or are confused.

MISSION, VISION, AND VALUES

Do you know your organization and what it stands for? The values it holds and what it hopes to accomplish? An organization's mission, vision, and values validate the organization's purpose and function in the community, so it is essential that all employees are unified and consistent in representing them in all of the work they do, both publicly and internally. As a supervisor, it is important that your actions and decisions regarding the program reflect the organization's mission, vision, and values. It is also your responsibility to create a sense of 'buy-in' amongst the *Promotores(as)*. The *Promotores(as)* should not only understand them, but should feel connected to and excited about them.

FEDERAL AND STATE LAWS AND REGULATIONS

Federal and state laws and regulations are non-negotiable – in other words, you must follow them. Fortunately, most of these requirements are set up to protect the worker and ensure that everyone is treated as fairly and equitably as possible. Many supervisors find this is the part of their job that causes them the greatest headaches, but it's pretty simple if you just keep in mind a few basic things. First, you are not expected to be a legal expert. Your supervisor should inform you of which laws and regulations you and the *Promotores(as)* are expected to know and follow. If you're not sure, ask. Second, if you were not given a Personnel Policy Manual or something similar, ask your supervisor for one. This document should outline the legal issues and rules you need to follow.

BOARD POLICIES

Your supervisor should know of a central place, most likely a Personnel Policy Manual, in which organizational policies and procedures can be found. The Board of Directors is typically responsible for ensuring that the mission, vision, and values of the organization are carried out and applicable laws and regulations are adhered to in your work. Many of their policies may address larger organizational issues, such as planning cycles, budgeting policies, and partner agency guidelines, that are not your responsibility to monitor, but it is important to know if they exist and to refer to them as needed.

If your organization has a Personnel Policy Manual, this could be a very important tool in your work as a supervisor. You may even use it every day. A comprehensive Personnel Policy Manual will give you very specific direction on your rights and responsibilities, what to expect from staff, and how to perform many everyday tasks.

POLICIES AND PROCEDURES

Reimbursement Procedures and Forms

Make sure you understand the different forms and procedures related to expense reimbursement, such as mileage or supply reimbursements. It is very important that you know and understand these forms and processes because, as a supervisor, you will need to explain them to the *Promotores(as)* and other staff.

Organizational Chart

Most organizations have several (or many) position titles and departments. One way to help you understand how these different positions interact and support the organization is to look at an Organizational Chart. It should clarify reporting lines and how information flows through the organization.

GRANT-SPECIFIC REQUIREMENTS

If your program is funded by a grant, it is likely that the grant has specific guidelines on how the funds are to be spent and what is to be accomplished. Some grants are more restrictive than others in terms of what can be purchased, how much can be spent on certain functions, and what activities must be accomplished during the grant. It is very helpful to read grant-specific documents so that you understand exactly what is expected of your program and your work. If a copy is not given to you, ask your supervisor for one or ask for a clear summary of the grant expectations.

See **Appendix A**, "*Promotor(a)* Supervisor Orientation Checklist," to help you get started in your new position and to keep you on track as the program continues. This tool covers the essential tasks you need to complete as a supervisor at different time intervals.

A Promotora *leading an education session*

SECTION

2

RECRUITING AND HIRING *PROMOTORES(AS)*

An important part of your job as a supervisor is to hire staff. If you begin your job after your team is hired, you may not have to worry about this. If this is the case, you should still familiarize yourself with the information in this section because chances are that you will have to hire a *Promotor(a)* for the program in the future.

PLANNING

One of the first steps you should take is to discuss hiring expectations with your supervisor and create or review job descriptions. Before beginning recruitment, you should know:

- How many people are you responsible for hiring?
- What qualifications are required (i.e., migratory and seasonal agricultural worker, certification, bachelor's degree, etc.)?
- Are the positions year-round or temporary?
- What is the compensation?
- What are the start and end dates for the position?

Next, make a timeline. Carefully project the timeline–then add a few days at various points based on possible bottlenecks. For example, reference checks should be quick, but time zone differences and schedules can cause delays. Even scheduling interviews can be more time consuming than expected because of the "back-and-forth" of requests, modifications, etc. Also, avoid overlapping any of the hiring process with a holiday season. Many people stop looking for jobs at this point due to family demands, and even those who apply become hard to track down to schedule for interviews. Waiting a couple of weeks is more effective in the long run than failing a search and having to start it all over again.

RECRUITING *PROMOTORES(AS)*

Your supervisor should be able to help you clarify what the qualifications are for the positions you are recruiting for. Other places where you may find guidance are in grant documents or, if they are available, previous hiring notes or documents. Your supervisor should also inform you if any specific credentials are needed, but it is important that you are aware that some states or funders may require certain credentials, such as certification.

There may be additional, program-specific requirements. For example, many chronic disease education programs use evidence-based curricula that have been developed and published by an organization. If the program is based off of a curriculum like this, it is almost a guarantee that the *Promotores(as)* will have to be trained and certified in that curriculum to administer it. Keep in mind that while it is ideal to find a candidate with these credentials already, it sometimes just isn't possible. If the training is something that can be offered once hired, consider being flexible about these requirements.

Regardless of prior trainings or credentials, there are two traits that all *Promotores(as)* must have to be successful:

1. Be a member of or have a close understanding of the community
2. Desire to help the community

The following are guidelines on additional qualities and skills you may want to consider:

- Able to communicate well with a diverse range of people, including the community, staff, community organizations, and partner agencies
- Able to gain respect of and build rapport with community members
- Outgoing personality
- Empathy; responsive to the needs of others
- Persistence
- Creativity and resourcefulness
- Cultural competence
- Natural leadership ability or potential
- Personal strength and courage
- Flexibility
- Positive role model for others
- Knowledge of community resources
- An interest in health and learning about health
- Related work or volunteer experience

- Bilingual—able to speak both English and the language of the community (if applicable)

Practicalities might include:

- Able to commit time and energy to the program
- Plans to remain in the community for the entirety of the program (for seasonal programs)
- Schedule and other responsibilities allow him/her to complete all required activities
- Able to read basic information and write on forms
- Able to use basic technology
- If the program does not provide it, that the *Promotor(a)* can arrange child care
- Has access to a reliable form of transportation

Depending on your project, you may have additional recruitment guidelines to consider. For example, whether or not the *Promotor(a)* is a mother may have a significant impact on the outcomes of a program for pregnant or new mothers. In the event that there are special considerations such as these, be sure your recruiting and hiring process complies with all federal and state regulations on non-discrimination. This is an area that your supervisor can offer you additional guidance on.

Appendix B, "Sample *Promotor(a)* Job Description," offers a general template for a *Promotor(a)* job description that can be modified as needed.

To start your search, get advice from your supervisors or other hiring staff on how they recruit candidates. Ask if they have any connections with partner agencies or with individuals from the community that may be useful for recruiting candidates. If the organization has hired *Promotores(as)* in the past or already has connections with members of the target community, start with these individuals. Tell them about the position, and ask them to spread the word, or if they are qualified, encourage them to apply for it. It is also a good idea to announce the opportunity to any local professional groups, such as committees, coalitions, or Community Health Worker groups. They may be able to make recommendations for candidates or pass the information on to their network.

These word-of-mouth methods are usually the best tool for finding qualified candidates when they are available. Other methods of recruitment may include:

- Postings on your organization’s website
- Postings on job-search websites
- Postings on social media
- Send job announcement to local organizations
- State workforce websites
- Post flyers

Recruiting for a seasonal or temporary position for migratory and seasonal agricultural worker programs is a slightly different process. For more guidance, see **Appendix C**, “Tips for Recruiting Seasonal or Temporary *Promotores(as) de Salud* for Migratory and Seasonal Agricultural Worker Programs.”

HIRING *PROMOTORES(AS)*

Create a simple screening form listing the required and recommended knowledge, skills, and abilities from the job description. If you check resumes or applications for the requirements right away, you can screen out a lot of applicants quickly and fairly. Leave space for notes on the screening form and use it to write things you want to remember later about each candidate. Be equitable and fair with all applicants, be aware of your rights as a hiring supervisor, and apply the same expectations and requirements to all applicants.

As you begin interviews, be sure to document every step of the hiring process. Ask your supervisor or the human resources department which documents you need to fill out (interview notes, screening checklists, communications with candidates, etc.), to whom they should be submitted, and where they should be filed.

During the interviews, review the expectations of the position and answer any of the interviewee's questions as honestly as possible. This will help both you and the candidate you are interviewing make sure that the position is a good fit. After the interview, keep information flowing to applicants about the status of the process. If candidates don't meet the minimum criteria, let them know that right away through an e-mail or letter. It creates a favorable impression of the organization and helps you determine who is still in the running.

Tip: If the position requires a certain level of a given skill, consider testing to measure the level of skill the candidate has. It is common for people to exaggerate their skill level in the interview. This will also ensure the hiring process remains equitable.

Only hire if you have a good candidate. It is not fair to you, the applicant, or the organization to hire someone who is not qualified for the position. If you have no qualified candidates, revisit your steps and try to figure out what went wrong and fix it before re-starting a search.

When you have settled on a candidate, schedule and describe the new employee's orientation in their letter of hire. It is important that employees understand their job, the organization, and expectations up front.

FREQUENTLY ASKED QUESTIONS

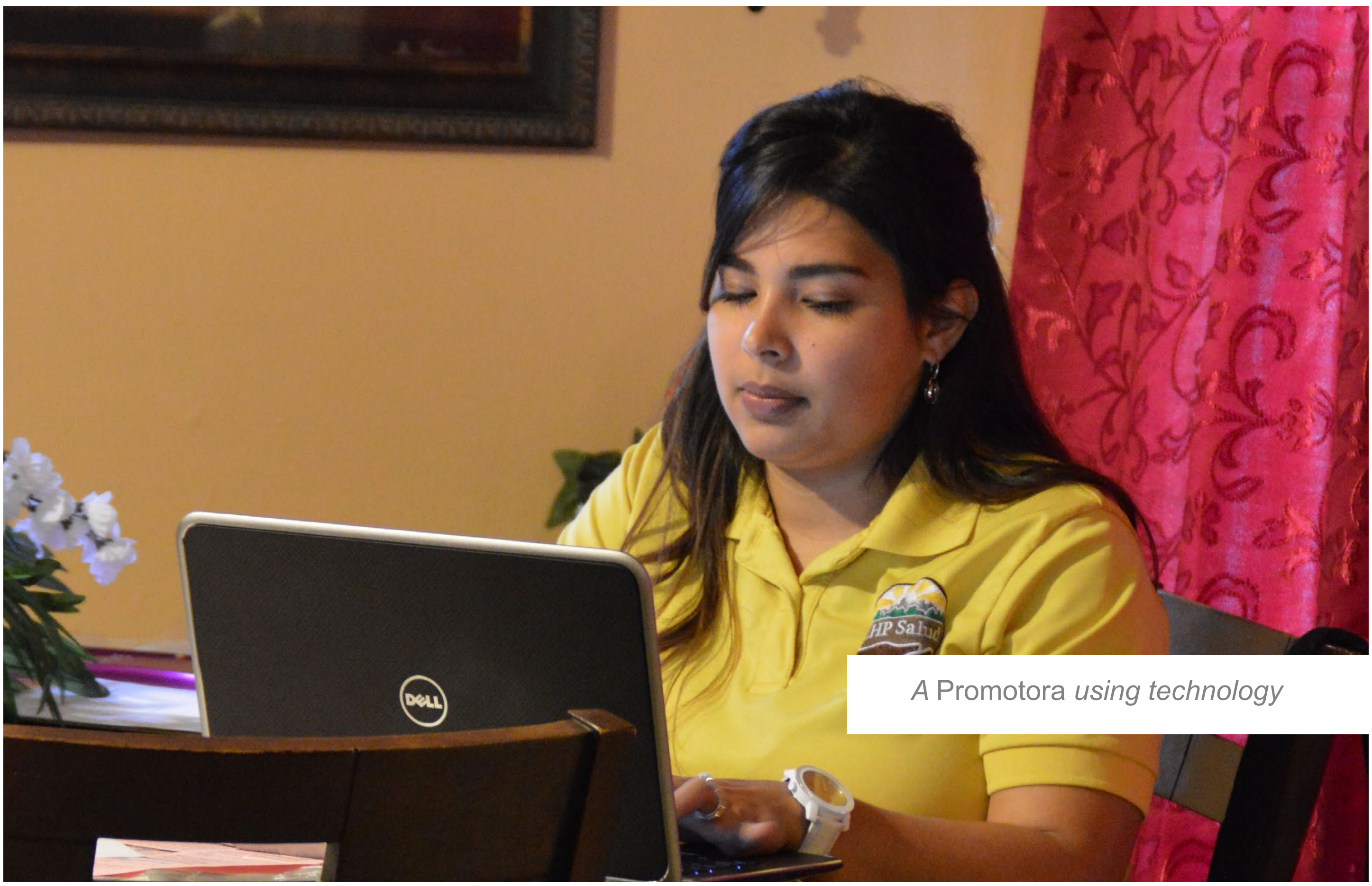
What if I am having trouble finding qualified candidates?

It is often difficult to find someone who meets all of the qualifications, especially someone from a specific community. Decide which qualities you cannot compromise and be flexible on the others. Look for a candidate who is eager to learn and shows potential. You can offer professional development and training opportunities to build any skills that they do not have when they are recruited.

What if there are no candidates from the community?

Situations will arise in which there are no suitable candidates from the community where the program will take place. In these situations, search for a candidate who has a deep understanding of the community, has had similar life experiences, or who has a connection to the community, such as a family member.

See **Appendix D**, "Hiring a *Promotor(a)* Checklist," to help you stay organized and on-track during the recruitment and hiring process.



A Promotora *using technology*

SECTION

3

ORIENTATION AND TRAINING

PLANNING

Once your team is hired, it's time to prepare for the orientation. It is your job to ensure that your team is knowledgeable and skilled in their work, but you are also a key player in team morale. You should balance all of these roles by providing an engaging yet informative orientation.

First, check with your supervisor to see if your organization already has a curriculum to use for orientation. If not, you will need to develop one. This may sound like a lot of work, but there are plenty of resources available to help create the content.

The content of the training should be framed around the following topics:

- Organization-specific information
- Information about the *Promotor(a)* profession or role
- Program-specific information

Check with local Community Health Worker coalitions or professional organizations to see if they know of any available training opportunities or materials that are relevant to any of these topics.

There are many online resources that may offer useful training materials that are program-specific. Institutes, associations, universities, and governmental or non-profit organizations usually have the most reliable information. Depending on the health topic of you program, the following websites may contain useful resources on different health topics for trainings:

- The National Heart, Lung, and Blood Institute
- National Diabetes Education Program
- Medline Plus
- American Diabetes Association
- Centers for Medicare & Medicaid Services
- Division of Community Health

No matter what the health topic of the program is, these topics should always be included in any *Promotor(a)* orientation:

- An orientation to the organization, including policies and benefits
- Roles, responsibilities, and skills of the *Promotores(as)*
- Program goals and objectives, as well as expectations for *Promotores(as)*
- How to navigate the local health and social service systems
- How to use any required technology
- The documentation and reporting process, including forms and paperwork
- Confidentiality and HIPAA policies
- *Promotor(a)* safety

Ideally, you should cover all of these topics before the *Promotores(as)* begin work in the community. However, if for some reason this isn't possible, note that each *Promotor(a)* must receive confidentiality training and sign a confidentiality agreement and any other documents as required by the program, organization, or funder before beginning work with clients. People in communities are more likely to answer personal questions or share medical information if they know this information is kept confidential, so good confidentiality training is of the upmost importance for any program.

Your organization will most likely already have a confidentiality agreement to use. The confidentiality agreement should outline the program's expectations of *Promotores(as)* regarding confidentiality. Take time during training to carefully read, explain, and answer questions about this document. It is a good idea to give a copy of the agreement to the *Promotores(as)* so that they can refer to it in the future.

See **Appendix E**, "Guidelines for Confidentiality Training and Sample Confidentiality Agreement," for a sample agreement and guide to training.

To determine what other additional topics should be included in the training in addition to these topics, "think backward" from your ultimate goal of the orientation:

1. Review the program goals and objectives and think about what activities the *Promotores(as)* will be asked to complete.

2. Ask the *Promotores(as)* what topics they are interested in covering (in addition to what is required by the program goals and objectives). The more input they have in shaping their program experience, the more receptive they will be to learning new information and ideas.

3. Then ask yourself, "What skills do they need to complete these activities?" For example:
    - Communication skills
    - Teaching skills
    - Ability to complete program forms

4. Write a performance objective for each skill identified. For example, "The *Promotores(as)* will be able to demonstrate active listening techniques."

5. Then ask yourself, "Which health and social service organizations do they need to interact with to accomplish these activities?" For example:
    - The Health Center
    - Medicaid office
    - Local non-profits

6. Write a performance objective for each organization. For example, "The *Promotores(as)* will be able to make an effective referral to the Health Center, including scheduling an appointment, giving directions, and following up."

7. Then ask yourself, "What knowledge do they need of health issues to complete these activities?" For example:
    - How to prevent diabetes versus helping diabetics manage their disease
    - How to recognize an infection in a cut

8. Write a performance objective for the knowledge needed. For example, "The *Promotores(as)* will be able to demonstrate foot care for diabetics."

Once you have a list of objectives, it is helpful to create a draft training schedule for the whole program. In addition to training on the skills and knowledge included in the objectives, build in time for:

- Team building and setting a tone for the group
- Topics suggested by the *Promotores(as)*
- Plenty of time to practice using technology and completing forms
- Using Popular Education methods (discussed later in this section)
- A balance of discussion/ideas with practical, hands-on skills
- Review and evaluation

As you plan your orientation you should consider the following:

- *How much training will the* Promotores(as) *need?*

  Do they already have certain skills or will they be starting from scratch? The amount of training needed for each program is different, but a general rule of thumb is 40 hours for an on-going program or 20 hours over two to three weeks for a seasonal program. Leave some extra time to spend going over forms or required technology step-by-step because this can take longer than you think.

- *When and where will the training take place?*

  If your *Promotores(as)* are not full-time employees, be especially considerate of their schedules, availability, and transportation needs. If your organization does not have an ideal meeting space, churches, community centers, or other nonprofits in or around the community might be able to help. If the *Promotores(as)* will need to attend training sessions offered by another institution, be sure to coordinate schedules ahead of time.

- *Who should present during the orientation?*

  You will lead the training, but think about guest speakers and other staff that should participate in the orientation. It is also a good idea to visit any locations of partner agencies the *Promotores(as)* will work with during training so they are familiar with the location and staff before they begin working with them.

> **Tip:** Make a list of local contacts or resources for *Promotores(as)* and hand it out during orientation.

Remember, while the social aspects of a *Promotor(a)* job usually come naturally to them, some of the other material covered may be totally new, especially using new technologies or even health information. To prevent *Promotores(as)* from feeling too overwhelmed, break down the information into digestible pieces and, if possible, spread things out. Use Popular Education (see the following sub-section) techniques to integrate different interactive activities into the training to keep it lively, interesting, and to appeal to different learning styles.

If after the training the *Promotores(as)* don't feel confident, pair them with a more experienced *Promotor(a)*. If this option is not available in the organization, you can accompany them on their first few activities in the community.

Appendix F is an "Orientation Checklist for *Promotores(as)*." Review this document to help you structure and develop your training. You can also modify this document to fit your program and distribute it to the *Promotores(as)*.

A Promotora *conducting outreach*

POPULAR EDUCATION

Popular Education is a philosophy and methodology of adult education that emphasizes the value of the knowledge every individual has gathered through their unique life experiences. The ultimate goal of Popular Education is to make education attainable, thus creating a more just and equal society. Using a wide variety of interactive teaching methods allows the *Promotores(as)* to learn from their own and others' experiences, discover new information, practice their skills, and take action to change their communities. The following information provides an overview of Popular Education:

Basic Principles of Popular Education

1. We are all teachers and we are all learners.
2. Whether we are doctors, agricultural workers, lawyers, or waitresses, we all know a lot based on our life experience. Therefore, as educators, we should always start with what people already know.
3. The purpose of education is not to maintain the status quo, but rather to create a more just and equal society.
4. We learn more when we feel comfortable and at ease with our fellow learners.
5. We learn more when we are actively involved.
6. We need opportunities to see and reflect on our own reality.
7. We need opportunities to practice what we have learned.
8. As educators, we should constantly seek input to improve our teaching.

Common Methods Used In Popular Education

1. Brainstorming–variations include activities like "Think, Pair and Share."
2. *Dinámicas*–short activities designed to build trust, help learn names, and wake people up. They are somewhat, but not exactly, like ice-breakers.
3. *Sociodramas*–skits that demonstrate some aspect of reality. They are not scripted but are prepared ahead of time and the actors are the facilitators.
4. Pictures–another way to represent reality so people can reflect on it.
5. Problem-posing–a set of questions used to help participants reflect on a *sociodrama* or other representation of reality.
6. Role plays–dramas used to help people practice a skill or develop empathy.
7. Simulations–an activity that allows participants to experience a situation as reality.
8. Cooperative learning– method of group facilitation that emphasizes that the community needs everyone's ideas and participation in order to achieve its goals.
9. Learning games–commonly used to help review what students have

learned.
(Wiggins, 2002)

Integrating Popular Education Techniques into Training Sessions

Start by referring to the list of learning objectives you developed for the training. Then, identify which methods listed above would be suitable for teaching the knowledge and skills in an interactive way. For example, if you want to prepare the *Promotores(as)* for doing outreach, the learning objective could be: "By the end of the session, the *Promotores(as)* will be able to name three methods for doing outreach." Interactive ways of teaching this skill might include role plays or *sociodramas*.

Here are a few tips to make Popular Education more effective:

- Start a session with a team building activity or an icebreaker/*dinámica* to help people feel at ease. See MHP Salud's "*Dinámicas* Booklet" for ideas of different interactive activities and icebreakers.
- During each session, always find out what people already know, and then fill in the gaps with interactive activities.
- Know how to balance fun, interactive activities with learning. It is tempting to fill an entire session with fun activities to keep people engaged, but always remember your audience and think about how relevant each activity is to the learning objective.
- It is a good idea to use a variety of teaching techniques for people with different learning styles.
- Remember that, on average, people have an attention span of about 45 minutes to an hour, so plan for breaks.

ON-GOING EDUCATION AND TRAINING

Training and educational opportunities should never stop with the initial orientation. To truly support the *Promotores(as)* to flourish in their role and grow as a professional, you should continue to make training and professional development opportunities available. Regular supervision meetings are a great time to continue training, but bigger opportunities should be available to *Promotores(as)* as well. Help your *Promotores(as)* identify areas in which additional skill building or professional development would be beneficial, and then encourage and assist them in finding opportunities. Your supervisor can help you identify these opportunities, but you can also check with local professional or CHW groups, or online CHW communities, for upcoming trainings, workshops, or conferences.

For start-to-finish details on how to facilitate a *Promotor(a)* training, see **Appendix G**, "Step By Step: How to Lead a Training with *Promotores(as)*."

A Promotora *using Popular Education methods*

SECTION

4

SUPERVISION

REGULAR SUPERVISION

Good training is critical to the success of a *Promotor(a)* program, but offering opportunities for supervision is equally important. Supervision is a regularly scheduled meeting that can happen on a weekly, bi-weekly, or monthly basis. Supervision can occur either in a group or individually.

In group supervision meetings, *Promotores(as)* can share stories and frustrations, learn from each other, give and receive mutual support, and participate in team-building activities. Supervisors can discuss the team's progress towards program objectives and make adjustments as needed.

Individual meetings between you and the *Promotor(a)* allow for more in-depth discussion and trouble-shooting around specific challenges. It is an opportunity for you to review paperwork, monitor and provide feedback on the individual *Promotor(a)'s* performance, flag areas needing follow-up, help plan future activities, praise individual achievements, and provide needed supplies or resources. Importantly, these discussions will allow you to assess professional development or training needs, monitor potential work-stress or signs of burnout, and give *Promotores(as)* the opportunity to provide feedback.

Whether supervision is offered as a group or individually depends on what works best for the program. However, if supervision is primarily given as a group, you should schedule another time to meet with *Promotores(as)* individually. It may not be necessary to hold individual meetings as often in this case, but schedule periodic check-ins with the *Promotores(as)*. This will give them the opportunity to talk to you more candidly about issues they do not feel comfortable discussing as a group and for you to more carefully monitor their personal achievements and needs.

Tip: Whether or not you have group supervision, it's a good idea to let the *Promotores(as)* learn from each other by inviting them to visit each other's sites for supervision at least once. The *Promotores(as)* can sometimes be the best teachers, and they can learn more from each other by seeing one another in action.

A best practice for supervisors is to plan to meet with *Promotores(as)* on a weekly basis for 45 minutes to an hour, although the frequency of supervision meetings will depend on the program. The chart below outlines the pros and cons for the frequency of supervision meetings to help you determine how often it is appropriate to meet with your *Promotores(as).*

Supervision Frequency	**Pros**	**Cons**
Weekly	• High involvement with program • Very connected to what's going on with the program and *Promotores(as)* • More opportunities to build trust with *Promotores(as)* • High level of support for *Promotores(as)*	• Time, especially for supervisors who have many other responsibilities
Bi-weekly	• Not as intensive as weekly supervision, but supervisor is still actively involved with the program	• Supervisor is more removed from day-to-day implementation of program
Monthly	• Less burden on the supervisor • May benefit purely volunteer programs or programs with expereinced *Promotores(as)* who need less guidance/ oversight	• Supervisor isn't as aware of program details • Too infrequent to catch and resolve issues as they happen

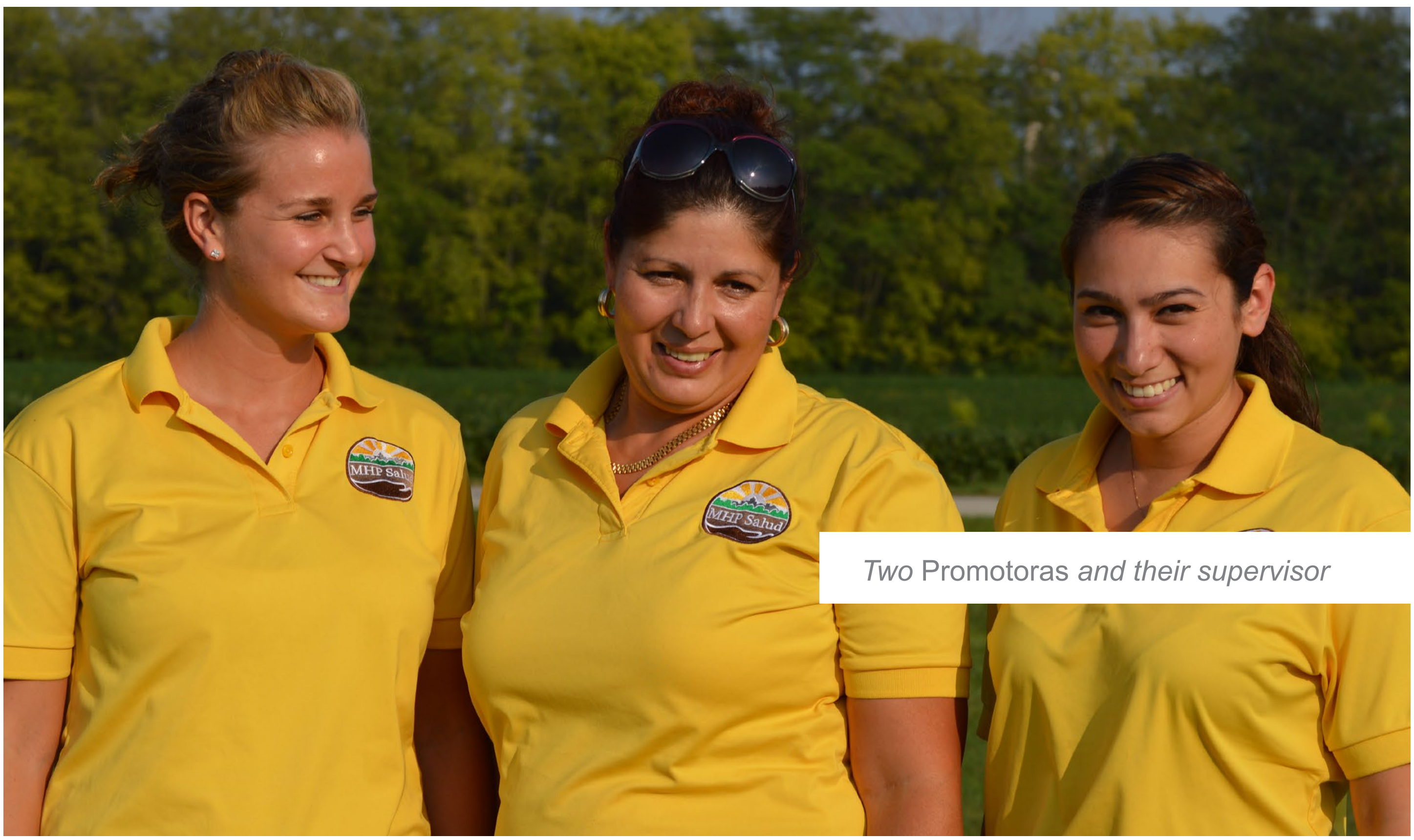
Depending on where your *Promotores(as)* are located in relation to your office and what their schedules are, you may plan to meet in the office or in the sites of where they work. If you normally meet in the office, remember that it is important to see the *Promotores(as)* in action, so plan to accompany them to their communities a few times a year or season. This will give you better insight into their work, as well as how the program is functioning in a broader sense.

In between meetings, keep notes of topics that have come up to discuss during the next scheduled supervision meeting. In addition, always cover the following topics:

- Program activities completed
- Challenges *Promotores(as)* have encountered
- *Promotores(as)'* plans for upcoming activities
- Training needs or opportunities identified by either you or the *Promotores(as)*
- *Promotores(as)'* feedback on your performance and the program in general
- Your feedback on the *Promotores(as)'* performance

Be sure to take some notes regarding what you talked about during supervision. This will help you remember anything that came up during the meeting that you need to follow up on. It will also help you track the *Promotores(as)'* progress and identify patterns that may indicate a need for further training.

For more information on leading group or individual supervision sessions, see **Appendix H**, "Step by Step: How to Lead Individual or Group Supervision Meetings with *Promotores(as)*."



Two Promotoras *and their supervisor*

REMOTE SUPERVISION

In some programs, the *Promotores(as)* are located too far from the office to reasonably meet with their supervisor in-person on a regular basis. This is especially common for programs in which the *Promotores(as)* are located in rural areas or that are very spread out. In these cases, supervision can be conducted remotely over the phone or using online video-conferencing options. The protocol for scheduling and holding supervision meetings should remain the same.

There are some challenges that come with remote supervision that you should be prepared for as a supervisor. One of the most common challenges that supervisors encounter is the *Promotores(as)'* having difficulties using the technology to communicate remotely. First and foremost, take time when you are first hired to make sure that you understand how to use the necessary technology and can explain it to someone else. Some *Promotores(as)* may pick up the technology right away, while for others this may be the most difficult part of their job. Be prepared to go through how to use the technology step-by-step once they are hired. If you plan to conduct the orientation in-person, or if there are other times that you will be together, make sure this is one of the priorities for your in-person meeting time.

TIP: It is also helpful to create a printed guide with screen shots or pictures that review the basic steps for using the technology or trouble-shooting common issues.

Communication can also be more challenging when you are supervising *Promotores(as)* remotely. Encourage *Promotores(as)* to "over communicate," and do the same with them. It is better to hear from them too much than not enough. This will also help you keep track of what they are doing. Let them know that they can call you with any questions, no matter how trivial they may seem. They should feel comfortable reaching out to you for anything. Talking things through may help them build confidence, even if it doesn't seem necessary, so don't diminish the importance of simply being available to answer the phone.

It is also helpful to use various methods of communication to get a message across. Sometimes a text message or email may be enough to send a quick message, but a video call is more personal and interactive for meetings. It allows you to read body language, which can be an important indicator of stress or frustration that you need to monitor. Try to use video calls for meetings or trainings whenever possible. Additionally, to convey really important messages, use both written and verbal forms of communication, such as a phone call followed by an email or a text message.

Tip: Although it can be time-consuming and logistically challenging, site visits are especially important if you don't have a lot of face-to-face time with the *Promotores(as)*.

SUPERVISING MULTI-TIERED *PROMOTORES(AS)*

It is increasingly common for programs to employ *Promotores(as)* with varying levels of responsibilities. A multi-tiered model is used to distribute the responsibilities of *Promotores(as)* based on the time commitment and expectations of their position. Using this model effectively allows a program to maximize its resources, extend the reach of the *Promotores(as)*, and create a greater program impact. It is typically used in programs that cover a broader geographical span or that have complex program activity plans. Not all programs employ this model, so you may not have to worry about overseeing different types of *Promotores(as)*. However, you may want to consider this model for future programming.

In one version of the multi-tiered model, *Promotores(as)* will assume the role of supervisor to "community leaders," or *Líderes*.[1] *Líderes* share similar traits with *Promotores(as)*, such as having a deep understanding of the community based on similar life experiences, background, and culture. However, *Líderes* have less specialized training and fewer job responsibilities than the *Promotores(as)*. *Líderes* are typically volunteer, contracted, or part-time workers. They work within their own and surrounding communities, whereas the *Promotores(as)* may provide services to a broader geographic area.

[1] MHP Salud uses the term Lideres, but there are many other titles that your organization could use for this position.

The role of the *Líderes* is to support the *Promotores(as)*, and the *Promotores(as)* are usually the supervisors of the *Líderes*. The *Líderes*' main job is to serve as a local resource, cultivate interest and support for the program, and help plan logistics for implementing a program in their communities (such as finding and securing an ideal venue for classes). By having a local resource like this, the *Promotores(as)* can focus on other, more specialized tasks. For example, in a health education program, *Promotores(as)* may be responsible for providing group education sessions. Planning and facilitating these classes may take up the majority of the *Promotores(as)'* time. In this case, *Líderes* can fill in the gaps by conducting outreach and coordinating other logistics within the community. The structure of the model in this example can be seen in **Figure B**.

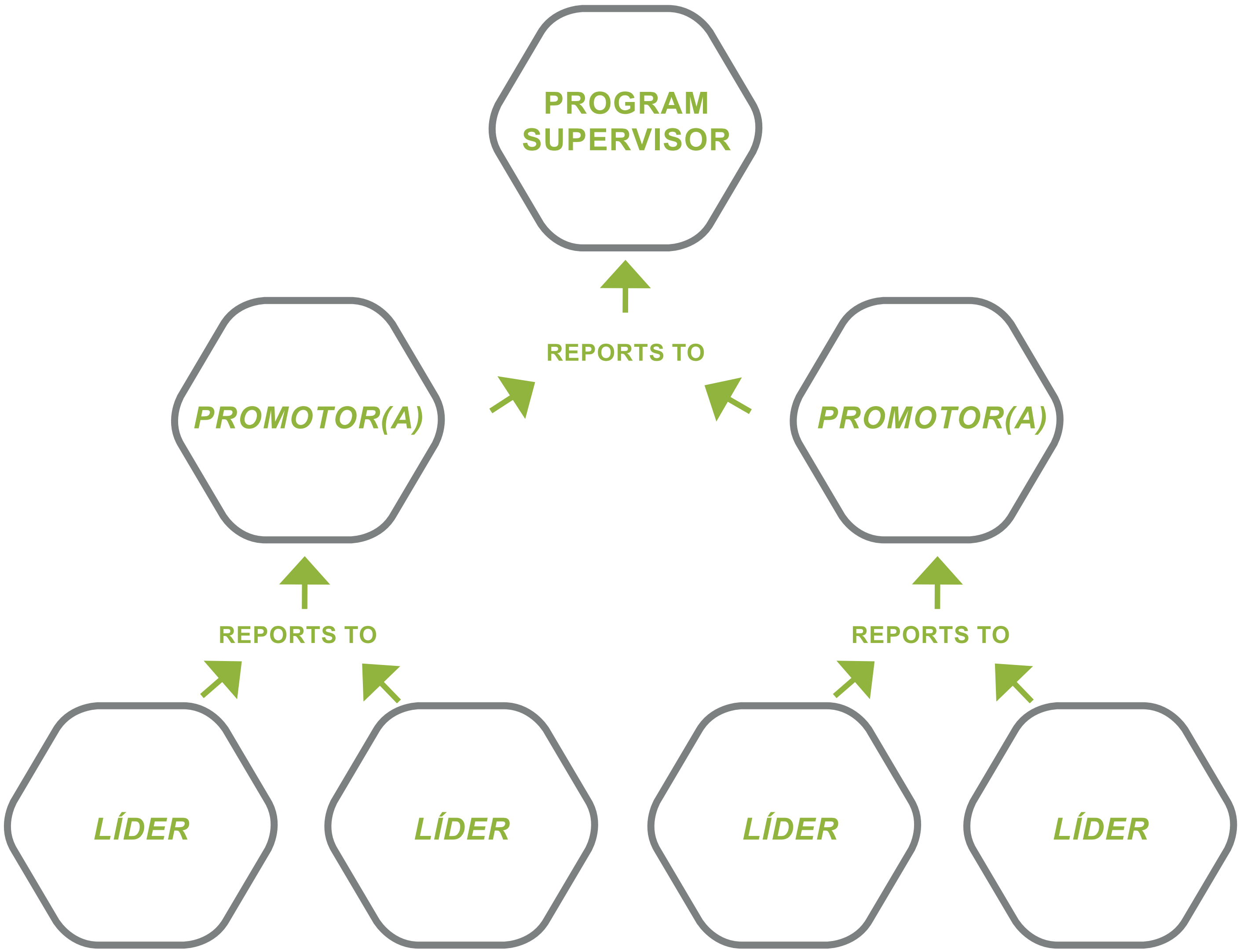


Figure B – Multi-Tiered Organizational Chart

The following are some guidelines for supervising this kind of multi-tiered *Promotor(a)* program:

1. When selecting *Líderes*, look for similar traits as the *Promotores(as)*. These can include minimum requirements, such as being from the community, possessing necessary language and literacy skills, and the ability to manage any needed technology.
2. Be very clear when distinguishing who will be responsible for which activities. This will help avoid future confusion or conflict.
3. While the *Promotores(as)* will manage the day-to-day supervision of the *Líderes*, make sure you explain bigger picture items, like the tasks at hand, the overall program goals and objectives, and the organization's mission.
4. Provide additional leadership and personnel management training to the *Promotores(as)* that will supervise the *Líderes*.
5. *Líderes* typically don't work full-time for the program and thus don't receive the same salary or benefits as the *Promotores(as)*. However, this doesn't mean they shouldn't be compensated for their work in some way. You should offer gift cards or other forms of recognition.
6. Organizations using this model should first research state laws regarding employment and compensation. Your supervisor should be in charge of investigating these laws and ensure that your organization is in full compliance with them, but you should be aware of them too.
7. Trust the lead *Promotores(as)*. This model is used to distribute work, so don't try to do it all yourself by managing both the *Promotores(as)* and *Líderes*. Instead, trust the *Promotores(as)* to appropriately manage and support the *Líderes*.

PERFORMANCE REVIEWS

In addition to providing feedback during supervision meetings, you are also responsible for conducting a staff performance review or evaluation. This is usually done once a year in a formal meeting where you discuss work accomplished, areas for improvement, and professional development needs, among other things. Thoughtful, honest, and regular performance reviews are critical to you as a supervisor, your staff, and the organization. They help guide an organization's professional development plan for all employees and help staff know what they are doing well and what duties or skills may need further attention. Ask your supervisor for the format and forms your organization follows to conduct performance reviews.

TIP: If your team includes temporary or seasonal *Promotores(as)*, you may not be expected to do a formal evaluation with them. However, consider doing some type of assessment with them at the end of the season to recognize their work and to point out ways to improve their skills for job opportunities in the future.

A Promotora *and her clients*

Some things for you to keep in mind during this process are:

- Evaluations should never be a surprise to the employee. In other words, if you are communicating well with your staff, they already know what they are doing well and what they need to improve on.
- Be honest. No one wants to be "the bad guy," but failing to be honest can hurt the program and the organization.
- Schedule plenty of time to talk with your employees about their evaluation.
- Don't just tell the *Promotores(as)* what they need to work on. Give solutions and options to improve.
- Use examples when outlining their strengths and weaknesses. Emphasize the good points! Be specific with suggestions on ways to improve.
- Be as clear and precise as possible. It is not fair to allow someone to fail because you are hesitant to hurt someone's feelings and "beat around the bush" to soften the message.

Appendix I includes a performance evaluation or assessment template that you can adapt for your program.

DISCIPLINARY ACTION

At some point, supervisors may need to take disciplinary action or talk to an employee who is not doing their job well or is disruptive to the organization. This typically happens after a time period of first working closely with the person individually to address challenges. When the challenges continue, people consistently do not meet expectations, or the reputation of the organization is at stake, disciplinary action is needed. It is never easy, but the process can be made easier if you keep your own supervisor informed, document your actions, and communicate clearly and directly. Try to remember that the goal of disciplinary action is to support or motivate an employee to do their work. The goal is NOT to punish or fire an employee.

Below are some tips for handling this type of situation, but you should discuss the protocol for disciplinary action at your organization with your supervisor.

- Remember, the actions you are taking are based on the employee's behaviors or actions; it is about the performance, not the person.
- Address the issue the FIRST time it occurs. Ignoring it won't make it go away, and letting the mistake repeat itself is not fair to the employee or to the organization.
- Take the time to clearly investigate and understand the circumstances surrounding the event or behavior. Be sure you are clear on the facts and have proof of the incident.
- Don't simply criticize–make sure to present exactly what the issue was, why it was inappropriate or unacceptable, and how it should be addressed in the future.
- Before a disciplinary discussion, have all your facts in order and be very clear in your statements so you don't get confused.
- Be sure the employee clearly understands the issue and the proposed solution. If the warning/discipline is verbal, follow through with an e-mail to the employee and your supervisor summarizing the conversation and proposed solution.
- Record everything attached to an employee's performance. This may mean starting with simple notes to yourself and progressing to formal letters in the employee's file.
- For serious personnel actions, include a witness who can take notes so you can concentrate on the meeting itself. The witness should understand their role is to take notes, not to participate. Witnesses may include other supervisors or an employee who can be trusted to keep the discussion confidential.
- Don't be afraid to ask for a translator if needed. When a person is upset, their concentration can slip and speaking another language can be difficult. You need to make sure the employee completely understands what you are saying.

SECTION

5

COMMON CHALLENGES AND HOW TO HANDLE THEM

Supervisors of *Promotor(a)* programs face the usual challenges that come with managing people and programs, but they also face challenges unique to the work of *Promotores(as)*. This section will present some of those challenges and suggestions for handling them.

STAYING CONNECTED

One of the first challenges for supervisors of *Promotor(a)* programs is staying on top of what is going on with the program. Because the work is mostly done outside of the organization in the *Promotor(a)*'s community, supervisors need to find ways to stay connected in the field. Supervision meetings with the *Promotor(a)* are an important and valuable method to stay connected to your *Promotores(as)*, but getting out into the community at some regular interval will allow you to directly see the *Promotores(as)* at work and the actual needs in the community.

RETAINING *PROMOTORES(AS)*

All programs lose staff or participants at one time or another. As a supervisor, you need to be aware of the challenges that your team is going through and how these challenges could impact their participation or performance, and respond appropriately. It can be time consuming and disruptive to have to hire or recruit new *Promotores(as)*, but it is inevitable for many programs.

Here are some common challenges that may lead *Promotores(as)* to eventually leave a program:

- Lack of transportation
- Lack of child care
- Literacy levels
- Language barriers
- Feeling overwhelmed by paperwork
- Long hours and feeling overworked or overwhelmed

- Moving or leaving the area
- Other employment opportunities

Being aware of and addressing the challenges faced by *Promotores(as)* who are struggling to participate in the program can help you retain a strong core group. Still, it's a good idea to also have an informal list of potential new candidates who could step in if necessary. They could be family members of current *Promotores(as)*, neighbors, or other leaders in the community. If you supervise a seasonal program, look for former participants who are already familiar with the program and your organization.

Retention with part-time employees is always a challenge because they may be seeking a full-time position. When possible, advocate for opportunities to expand part-time positions to full-time, or consider outstanding *Promotores(as)* for other full-time positions in the organization. In addition, you can consider offering incentives to part-time employees, such as professional development opportunities. Showing your appreciation through different forms of recognition will help keep *Promotores(as)* motivated.

The same goes for volunteer *Promotores(as)*. When possible, advocate for paid positions for outstanding volunteers in order to demonstrate the possibility of growth within the organization. If this is not possible or realistic for the program, showing your appreciation and offering incentives go a long way.

KEEPING *PROMOTORES(AS)* MOTIVATED

Both a supervisor's and *Promotores(as)'* jobs can be incredibly rewarding, satisfying, and empowering. However, it can also be an emotionally-draining and frustrating job. It's easy to lose steam and burn out. One of the best ways you can support *Promotores(as)* is by encouraging, motivating, and inspiring them. Here are some tips to help avoid burnout:

- Pace yourself and help the *Promotores(as)* pace themselves. Know the limits of your time and energy and help the *Promotores(as)* monitor

themselves as well.
- Hold a training on this topic and continue to discuss the topic during supervision. Supervision meetings are also a great time to 'check-in' with your *Promotores(as)* and monitor any signs that a *Promotor(a)* is getting burned out.
- Plan stress-relieving activities around times of high stress or on a regular basis. They can be low-cost and simple, like going for lunchtime walks or coffee-breaks.
- Always keep a positive attitude. It may seem obvious, but it's important. The *Promotores(as)* are influenced by your behavior, so it's important for them to see that the program is important to you.

Another simple but incredibly effective way to motivate *Promotores(as)* is through appropriate recognition. *Promotores(as)* have a challenging job, and they work hard at it. The simple act of noticing and reaffirming the *Promotores(as)* of this can go a long way. For volunteer *Promotores(as)*, it is absolutely essential that you provide some form of recognition, although it's recommended to recognize the hard work of all *Promotores(as)*. Here are a few ideas:
- Opportunities to attend or present at conferences
- Scholarships or continuing education opportunities
- Professional development trainings
- Certifications or credit towards credentialing
- Child care during trainings
- Snacks or a meal during trainings
- Incentives for completing objectives, such as gift certificates
- Free or reduced health care
- Credit for community service hours for residents living in cooperative housing communities
- Bonuses on the holidays or during another particular time of the year
- Reimbursement of personal costs incurred, such as use of personal cell phones and mileage
- An annual or end-of-season celebration, special meals, or events to recognize the *Promotores(as)*' accomplishments

- T-shirts, hats, mugs, book bags, etc. with the name of the program
- "*Promotor(a)* of the Month" or other recognition awards

COMMUNICATING WITH YOUR TEAM

You may have realized that all of the major tasks of a supervisor require strong communication skills. Good supervisors have good communication skills. It's simple, but true. Because you will be working with different types of people with their own communication preferences and styles, sticking to some basic, common communication tips can make your job and relationship-building easier:

- Communication isn't just about the person conveying the message. Listening is an important part of communication. It requires you to stop thinking about what your response is going to be and actually focus on what the person is saying.
- Be as clear and to the point as possible. Be honest and upfront. Don't make people guess what you are trying to say.
- Listen for the meaning and feeling behind the words (fear, anger, unhappiness, joy) and repeat to the person what you understood was said ("It sounds like you…").
- Show respect for the person and their viewpoint, even if you do not agree with the message.
- Don't be concerned with who talks the most elegantly or gets to speak more–it is about the message.
- Decide what your answer is going to be AFTER the person has finished speaking.
- For serious conversations, arrange for privacy and an uninterrupted time and place.
- Encourage communication through good eye contact, attentive body language, encouraging words, and even silences as appropriate. In other words, let the other person know you are interested and engaged and not simply going through the motions.

Sometimes, communication is not pleasant or respectful because people are frustrated or thoughtless, and conflict occurs. Every supervisor faces difficult communication issues at one point, and it can be uncomfortable to deal with. But we still need to deal with it because ignoring the issue won't solve the problem. So how can you resolve the issue without making it worse?

- Thank the person for their comments and input–even if the comments were shouted at you. Don't take the attack personally; there are many reasons why the person may be frustrated, angry, or concerned.
- Keep your cool and don't lash out. Be aware of the tone and volume of your voice.
- Relax and make your body language non-threatening and open to communication.
- Start your response with the phrase: "Let me see if I understand you correctly." Then restate the person's argument as completely and accurately as you can. If you are incorrect, let them correct you and restate your understanding back to them again. This will prevent a misunderstanding from making the issue worse.
- Find at least one thing in their argument that you can agree with and start from a point of mutual agreement.
- Ask them what they see as an acceptable solution. You are not saying you will solve the issue in that way, but it is important to know what an acceptable resolution would be to them in order to reach an eventual understanding.
- If the issue concerns a third party, do not take sides on the issue. Let them know you will look into the matter and get back to them–and make sure to do so.
- If the issue is about a decision or action on your part, don't make excuses. Remember the communication rules above – be honest, be clear, and don't take it personally.
- If someone is becoming very upset or emotional, sometimes it can be beneficial to take a break for a few minutes to give each person time to collect themselves. Respectfully stepping away and taking a breath for even just a minute can prevent further escalation.
- If you are unfamiliar with the issues, don't be afraid to say you do not know

but you'll look into the situation and get back to them. Give them a time when you will have an answer or response and keep your promise.

- Cultural or linguistic differences between a supervisor and an employee have a major impact on communication. If you are working with people or communities of a culture different from your own–or who speak a different language from you–be sure to ask your supervisor how you can learn about the cultural and linguistic issues that can affect your relationships and communication.

COLLECTING DATA AND PAPERWORK

One of the largest sources of frustration for a supervisor comes from incorrect or incomplete paperwork or data submitted by *Promotores(as)*. Everybody makes mistakes from time to time, so there is no way to completely prevent this, but there are ways to minimize mistakes and frustrations.

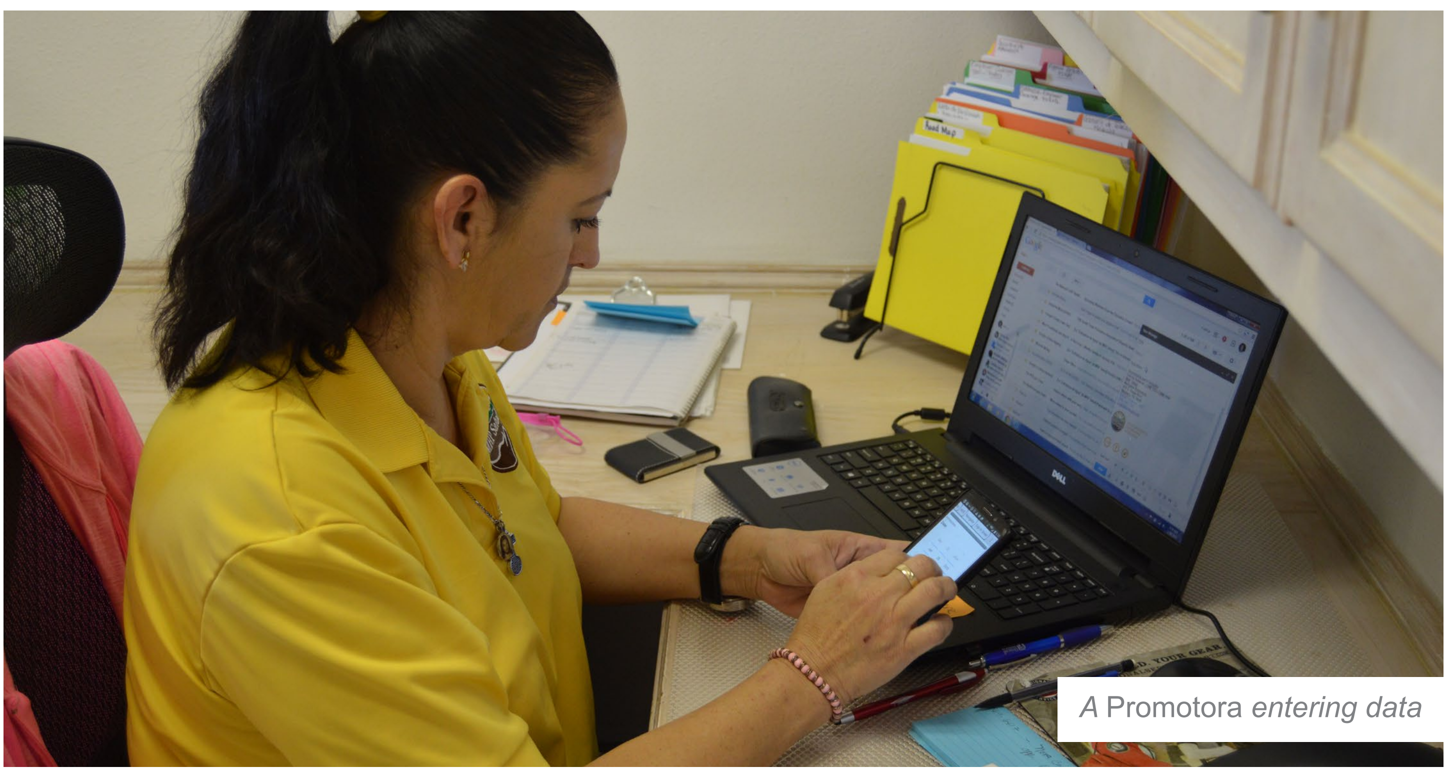
Proper and thorough training on paperwork, data collection, and submission is the first step. The importance of taking plenty of time to work through the processes of collecting and submitting data and completing and submitting forms and paperwork can't be emphasized enough. Try using different Popular Education techniques to make this repetitive process more interesting and to make sure you cater to the different learning styles of the *Promotores(as)*.

Continue to offer support and training during supervision meetings. Depending on the *Promotores(as)'* confidence, you may want to go through the process step-by-step for a few weeks during supervision. Always make it a practice to review any forms, data, or paperwork within a week from the date they were submitted. This will ensure that if there are mistakes they can be addressed right away before the problem escalates into something bigger. It will also ensure that the information is still fresh in the P*romotores(as)*' mind and can be accurately corrected.

USING TECHNOLOGY

Similarly, the use of technology is frequently one of the biggest challenges for both *Promotores(as)* and their supervisors and can lead to incorrect data entry or incorrect submission of forms, among other things. Learning to use technology can be very intimidating and frustrating for *Promotores(as)*, so be patient with them. Although it may seem tedious or unnecessary, it is a good idea to go through how to use any required programs or applications step-by-step. Allocate plenty of time for the *Promotores(as)* to practice. Spending this time in the beginning may prevent mistakes and frustration later, so it is worth the time it takes. It will also help the *Promotores(as)* build confidence. Plan to do an intensive training on all of the technology in orientation, and continue to reinforce it in supervision.

Remember that remaining calm and demonstrating patience will let the *Promotores(as)* know that they can feel comfortable approaching you with questions as issues arise, even if it is outside of scheduled meeting times. Your patience will pay off by preventing larger issues in the future that are more difficult to fix.



A Promotora *entering data*

It may be tempting to avoid using technology, especially if the *Promotores(as)* continue to struggle with it. However, this will only lead to more problems down the road. Confront issues as soon as they arise and provide extra encouragement and support for any *Promotores(as)* that feel less confident. These are important skills for *Promotores(as)* to build both professionally and personally.

Written instructions with visuals are another great way to offer technological support to *Promotores(as)* outside of scheduled meeting times.

ENSURING *PROMOTOR(A)* SAFETY

Conducting any type of outreach in the community can expose the *Promotores(as)* to a variety of personal safety risks, so a safety plan is necessary. It is very possible that the organization may already have safety policies and procedures in place. If this is the case, your supervisor should let you know about them, or they can likely be found in a Personnel Policy Manual. If not, work with your supervisor to develop one before the *Promotores(as)* begin orientation, or as soon as possible if the program has already started.

Some general guidelines for protecting the *Promotores(as)*' personal safety include:

- Develop a system in which you, and possibly other agency staff, always know when and where *Promotores(as)* will be working in communities or at client's homes. Shared virtual calendars can be very helpful, as long as the *Promotores(as)* remember to keep them updated.
- Have a list of emergency contacts for each *Promotor(a)*.
- Send the *Promotores(as)* out in pairs to any areas that may pose a high threat to personal safety for whatever reason.
- Supply each *Promotor(a)* with a safety kit. A kit may include: sunscreen, insect repellent, an umbrella, hand sanitizer, a whistle and/or pepper spray (depending on state laws), car magnets with the agency logo, t-shirts with the agency logo, and a first aid kit.

- Encourage *Promotores(as)* to always carry a cell phone and a charger.
- Create an emergency plan for a variety of situations with *Promotores(as)*.

MAINTAINING BOUNDARIES

Boundaries can be difficult to set not only between *Promotores(as)* and their communities, but between you and the *Promotores(as)* as well. You can lead by example to help the *Promotores(as)* maintain professional boundaries with their clients by doing the same yourself. Keeping professional boundaries will help avoid difficult situations and create a healthier working environment.

Promotores(as) are peers by definition, so they are already deeply involved in the community. Furthermore, they are highly empathetic and are willing to go to great lengths to serve their communities. These traits are what make *Promotores(as)* so successful, but they can also lead to stress for the *Promotores(as)*. Professional boundaries may be different for each *Promotor(a)*, and that's okay. Review this topic in training and challenge the *Promotores(as)* to define their boundaries. Although the *Promotores(as)* will likely have different levels of comfort setting boundaries, be sure to review strategies for setting boundaries in their work and review what would be considered unacceptable. For example, loaning money to a client would universally be considered an unacceptable breach of professional boundaries.

Suggestions for Helping *Promotores(as)* Set and Keep Boundaries

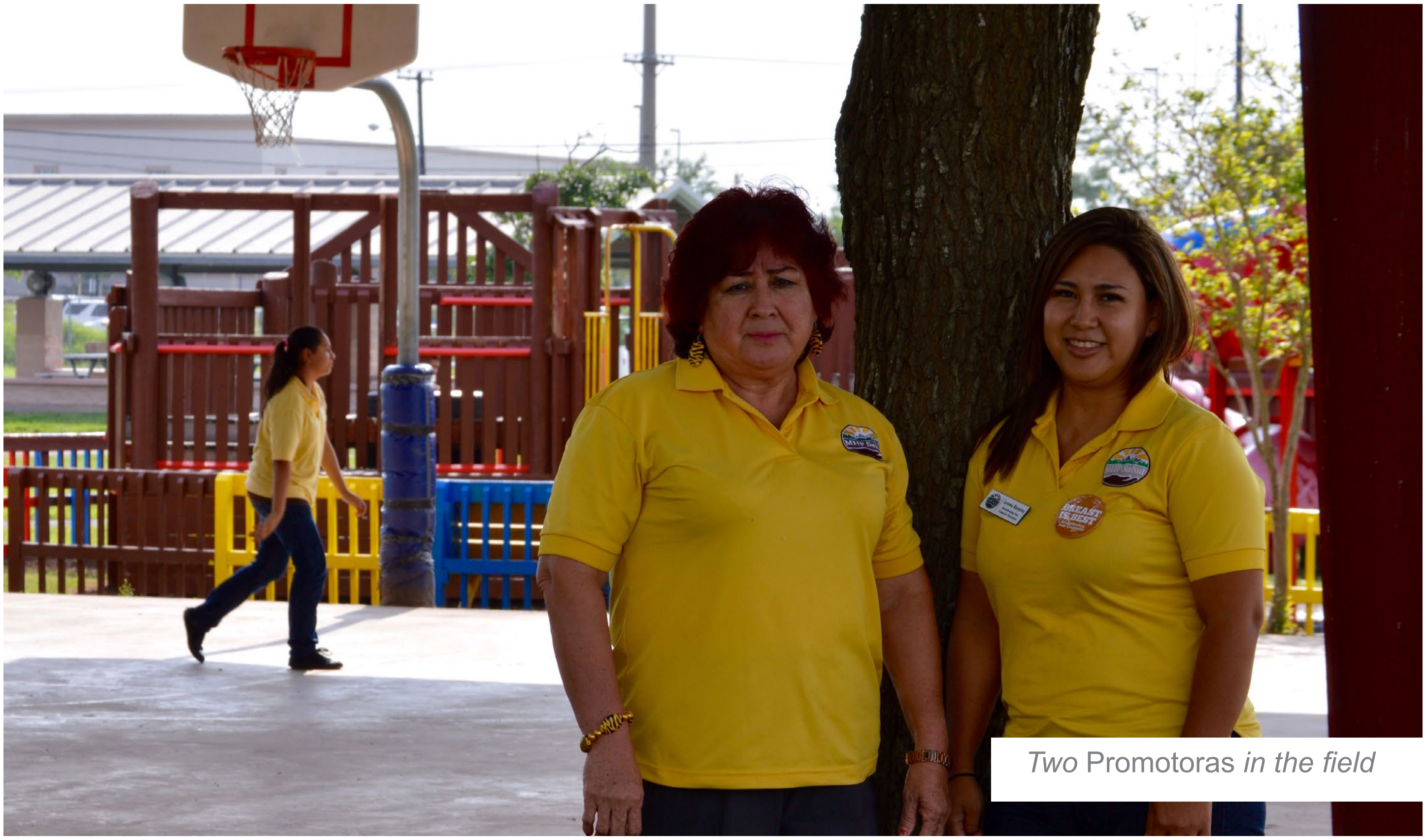
- Set work hours for their appointments, paperwork or data entry, timesheets, etc.
- Encourage them to turn their phones off when not working (and do the same yourself)
- Establish when *Promotores(as)* will conduct home visits
- Only contact *Promotores(as)* at appropriate hours
- Encourage leave
- Determine best communication methods
- Check in on caseload
- Know when to delegate

Be sure to uphold the same standards in your relationship with the *Promotores(as)*. This doesn't mean that you always have to be serious around the *Promotores(as)*. In fact, it is a good idea to be casual with the *Promotores(as)* when appropriate. This helps them see you as not just a disciplinary or authoritative figure, but as someone they can go to when they need help. Just be careful to not be so casual and friendly that you can't fulfill your role as a supervisor anymore.

MANAGING YOURSELF AND DELEGATION

Your role as a supervisor means that you, with the help of your supervisor, need to plan the work of both yourself and your staff to meet various program goals. This can be a lot to handle at times, so finding a good system for managing your work is important. Below are some hints that may help. Pick and choose those that work best for your personality, management style, and program. Don't be afraid to ask your colleagues what works for them.

- Create a system to track goals and tasks. This can be done electronically, via paper lists and/or charts, or a combination of the two. Start with your program goals, set tasks that will help you accomplish the goals, add a timeline, and assign tasks and goals to both yourself and your staff as appropriate.
- Set up a system of electronic or paper calendars or reminders that are helpful.
- Evaluate yourself on a regular basis–honestly–and adjust as needed. No one excels at everything, so figure out what you do well and what you are struggling with, and take steps to address your areas of weakness.
- Your supervisor is there to help–don't be afraid to ask for direction, clarity, or advice. Or, find a mentor or a coach to go to for advice and assistance.
- Recognize signs of stress in yourself and in your team and diffuse the stress in a healthy way. While some stress is normal, a lot of stress decreases your effectiveness and can make the workplace an unhappy and difficult place.



Two Promotoras *in the field*

- Don’t be afraid to delegate. Being a supervisor means planning and tracking the work, not doing it all yourself.
- Don’t let email, phones, or visitors consume your day. Set aside specific times to check email, restrict instant messages and chatting to certain times, and schedule appointments with yourself for quiet work time.
- Consider your goals and schedule before agreeing to take on additional work. “No” is not a dirty word. Ask yourself if it is essential, and if so, “Am I the right one to do it?”
- Do the job right the first time so you don’t waste time correcting mistakes. Proofread your work and ask a colleague to proofread it as well–especially if it is long and complex.
- Take a break when needed. Short breaks during the day like a walk, stretch, or a brief chat with an office mate can help you re-energize and regain focus. A vacation or two during the year will revitalize you.
- Recognize that management is a process that is never really finished. Things cycle on and off your to-do list, but there will always be items on the list.

General Tips for *Promotor(a)* Supervisors

1. *Be flexible*–Depending on your program, the *Promotor(a)*'s work may not be a nine-to-five-job.
2. *Trust the* Promotores(as)–Since the *Promotores(as)* do most of their work in the community, you can't be looking over their shoulder all the time. They are the experts that know the community better than anyone.
3. *Be accessible*–Both through regular supervision meetings and when challenges arise in which the *Promotores(as)* need their supervisor's support.
4. *Listen well*–Listen to the ideas of the *Promotores(as)* and help them put them into practice.
5. *Treat the* Promotores(as) *as equals*–Know that they are the experts on their community and share the decision-making power with them.
6. *Put the* Promotores(as) *in the spotlight*–Whenever possible, have the *Promotores(as)* take the lead. For example, ask them to present for local organizations or at a conference.
7. *Practice self-awareness*–Invite feedback from the *Promotores(as)* and recognize your role in problems and in solutions.
8. *Keep tabs on the big picture*–Be aware of what is going on in the community and organization the *Promotores(as)* are working with, and share this information with them.
9. *Be prepared*–Prepare and share an agenda with the *Promotores(as)* prior to supervision. Ask the *Promotores(as)* to bring at least two things to share, ask, or talk about.
10. *Empower the* Promotores(as)–Don't fall into the temptation to do things for the *Promotores(as)* because it is quicker or easier. Encourage the *Promotores(as)* to learn new skills and support them as they do.
11. *Help* Promotores(as) *share their voice*–Encourage *Promotores(as)* to get involved in local or state CHW initiatives, coalitions, or professional organizations, and ask them to bring back information from these experiences to share with the organization.

SECTION

6

REVIEW AND CONCLUSION

SCENARIOS FOR REVIEW

Read over the following scenarios and think about what you would do before reading the answer.

"Many of my Promotores(as) *don't speak English well, and the technology they use or the forms the funders require us to complete are only in English."*

The best way to resolve language barriers is to allocate time to go through each step with the *Promotores(as)* side-by-side until they are able to do it unaccompanied. Have them take notes the first time, practice doing it together next, and finally have the *Promotor(a)* practice without help to be sure the *Promotor(a)* has mastered the skills. This does require a time investment at the beginning, but it is well worth the effort to prevent errors that are time-consuming and more difficult to correct in the future.

"It's been several weeks and some of the Promotores(as) *are still not completing and submitting the forms correctly."*

Use the same method listed in the previous response – go step by step through the forms with the *Promotores(as)* during supervision until they are able to complete them independently. If a *Promotor(a)* is still struggling or it is taking too much time out of supervision, schedule a training outside of supervision. Ideally, you should work with the *Promotor(a)*, but other agency staff can step in if more support is needed.

"We're half-way through the program, but we haven't made much progress on our goals."

Develop your own system to keep track of the goals and paperwork. You might consider calendar reminders or scheduling time to review paperwork on a regular basis. If you fall behind in reviewing forms, try to at least count how many each *Promotor(a)* has done. Make sure that discussing the number and quality of the education and forms is a part of each supervision meeting. You may want to review the forms before each supervision meeting. If a *Promotor(a)* falls behind, make an agreement about how many s/he will do in the following weeks.

It is also important to communicate this with leadership at the organization and funders. Talk to the *Promotores(as)* to find out what may be causing the delay and report this feedback to leadership and funders. Make recommendations on what could be improved to help meet program goals and problem solve cross-organizationally as a team on how to reach these goals.

"I recruited eight Promotores(as)*, but then half of them quit."*

It's not unusual to have to re-recruit. Some supervisors have even had *Promotores(as)* pull out of the program before it has begun. After you have recruited a particular candidate, keep in touch until training starts. Always keep your eyes open for back-up candidates.

"It's the middle of the program, and we're all feeling a little burned out."

It's important to pace yourself throughout the program cycle. Know the limits of your time and energy. Make sure you prioritize what's most important. For less important things, ask someone else for help, or do them later. You can set a good example for the *Promotores(as),* who also need to set limits about how much they can give to others and still be healthy themselves! Hold a training on this topic for them and make sure to discuss it during your supervision meetings. Often, the *Promotores(as)* need some support in taking good care of themselves.

CONCLUSION

Being a supervisor can be challenging, rewarding, fun, lonely, and most of all, a tremendous learning experience. We hope the suggestions in this Manual are useful to your work as a supervisor.

MHP Salud has many other materials and resources related to all aspects of developing, implementing, and directing *Promotor(a)* or Community Health Worker programs available for free download on our website, mhpsalud.org. The following resources are specifically meant to guide management staff through the implementation of *Promotor(a)* programs.

- *Promotor(a)* Program Implementation Guide
- Evaluation Toolkit for *Promotor(a) de Salud* Programs

For further questions or technical assistance, please contact MHP Salud at info@mhpsalud.org.

APPENDIX

Appendix A: *Promotor(a)* Supervisor Orientation Checklist

TASKS THE FIRST WEEK		
RELATED TO YOUR POSITION		
DONE	**TASK**	**NOTES**
☐	Meet with YOUR supervisor to understand what is expected of you and your team. Be sure to ask questions if needed. Set up a "check-in" system with your supervisor based on your management and communication styles.	
☐	Read about the mission, vision, values, and history of your organization.	Not all organizations will have all of these. Ask your supervisor.
☐	Read the documents related to your grant/program, including: • Original application • The "notice of funding award" if applicable • Any reports already written • The organization's Strategic Plan as it impacts your program and work	As needed, your supervisor may only provide you with some of these documents.
☐	Read your job description! Do you know and understand what is expected of you? Make a list of questions for your supervisor.	
☐	Review the organizational chart–do you know to whom you report and who reports to you?	
☐	Read and know the Personnel Policy Manual–which requirements apply to whom and when?	
☐	Read and know the Financial Policy Manual–which requirements apply to whom and when?	

☐	Ask your supervisor if you should introduce yourself to the funder, and if so, make a plan to do so (when and how).	
☐	Review the most recent revenue and expenditure or budget report. If you are responsible for creating the budget for your program, do so with your supervisor.	This describes the status of your program's budget. Ask your supervisor because reviewing and monitoring your program's budget may be their responsibility and not yours.
☐	Develop systems that remind you of your goals and deadlines.	
☐	Review any evaluation databases or systems already established for your program. If none have been created, discuss this with your supervisor and follow up accordingly.	
☐	Review the organization's protocol for saving and storing electronic documents.	
RELATED TO THE TEAM YOU SUPERVISE		
☐	Review the personnel files of staff reporting to you and become familiar with their job descriptions, qualifications, and past performance.	"Staff" could include *Promotores(as)* and other staff assigned to you. In some cases, you may not have any staff on board when you begin because you are responsible for hiring them.
☐	Meet with your employees and *Promotores(as)* as a group. Describe your expectations and larger program goals and solicit theirs.	
☐	Set your "game plan." Who on the team is going to do what based on their position, time, and skills, and what needs to be completed?	
☐	Decide how to communicate your game plan, and provide updates to all members of your team and your supervisor.	

☐	Meet with members of your team and address specific goals and/or concerns connected with their position or situation. Create a schedule for regular check-ins for support and supervision.	
TASKS THE FIRST MONTH		
☐	Check for consistency and timely submission among the documents your team has submitted. Are all necessary timesheets, reimbursement forms, and evaluation documentation being submitted on time? If not, follow up on these issues and discuss them with your staff and supervisor. Make a plan to follow through with action steps to address them as needed.	
☐	If you hired staff or *Promotores(as)* since you began, have you completed all of the hiring paperwork and their orientation?	
☐	Revisit the systems you have developed for organizing paperwork, communicating with your team and with your supervisor, and for meeting program goals. Are they working well? Is some modification needed? If so, do so.	
☐	Maintain the schedule of supervision meetings with your team.	
☐	Are you receiving the support and information needed from your supervisor? If not, what else do you need? Prepare your requests and possible solution options, and talk with your supervisor to jointly solve the issue(s).	
☐	Review the most recent revenue and expenditure or budget report and make any necessary adjustments.	This may be your supervisor's responsibility and not yours.

TASKS THE FIRST THREE MONTHS		
☐	Continue to check for consistency and timely submission among the documents your team has submitted. Are all necessary timesheets, reimbursement forms, and evaluation documentation being submitted on time? If not, follow up on these issues and discuss them with your staff and supervisor. Make a plan to follow through with action steps to address them as needed.	
☐	Begin planning for end-of-season evaluation interviews with staff or *Promotores(as)* and set dates to complete them.	For seasonal programs only.
☐	Are you receiving the support and information needed from your supervisor? If not, what else do you need? Prepare your requests and possible solution options, and talk with your supervisor to jointly solve the issue(s).	
☐	Review the most recent revenue and expenditure or budget report and make any necessary adjustments.	This may be your supervisor's responsibility and not yours.
TASKS THE FIRST SIX MONTHS		
☐	Continue to check for consistency and timely submission among the documents your team has submitted. Are all necessary timesheets, reimbursement forms, and evaluation documentation being submitted on time? If not, follow up on these issues and discuss them with your staff and supervisor. Make a plan to follow through with action steps to address them as needed.	
☐	Complete any remaining end-of-season evaluation interviews with staff or *Promotores(as).*	For seasonal programs only.

☐	Revisit the systems you have developed for organizing paperwork, communicating with your team and with your supervisor, and for meeting program goals. Are they working well? Is some modification needed? If so, make the necessary changes.	
☐	Complete all end-of-season programmatic and financial reports (all evaluation documentation, reimbursements, supplies, etc.).	For seasonal programs only.
☐	Are you receiving the support and information needed from your supervisor? If not, what else do you need? Prepare your requests and possible solution options, and talk with your supervisor to jointly solve the issue(s).	
☐	Collect and submit any required employee-related documentation or supplies from all staff and *Promotores(as).*	For seasonal programs only.
☐	Review your staff's job descriptions for accuracy and completeness now that you really know what they do. Adjust as necessary in consultation with your supervisor.	
☐	Self-evaluate your performance–honestly. Talk with your supervisor about your performance, and explore options to obtain additional training and/or support as needed.	

☐	Now that you have seen a good bit of work from your staff and things have had a chance to "gel," review your staff's progress and performance. Are adjustments needed to their work-loads, tasks, worksites, etc.? At this point, some supervisors find it helpful to give a "mini-review" of what is going well and what is not. It is also a good time to assess whether an employee who is not meeting expectations needs additional training and/or remediation.	
☐	Make sure you understand the timeline and expectations for formal employee performance reviews, which typically take place every year.	
☐	Review the most recent revenue and expenditure or budget report and make any necessary adjustments.	This may be your supervisor's responsibility and not yours.

Appendix B: Sample *Promotor(a)* Job Description

Before using this sample template, research your state's training and certification laws and modify this document based on state specific regulations. You should also adapt the roles and responsibilities in this Job Description to reflect those that are required for the position you are hiring for. The ones listed here are only examples you may want to use.

Fair Labor Standards Act Status: Non-Exempt; hourly
Job Classification: *Promotor(a) de Salud*
Reports to: Program Coordinator

Essential Functions

- Provides peer health education and support to the families within designated areas.
- Performs all functions and activities within the guidelines and philosophy set forth in **[organization name]** Strategic Plan, policies, mission, goals, and vision.
- Participates as a member of various teams as needed.
- Actively participates in, and successfully completes, training provided by **[organization name]** and other agencies.
- Provides peer health education through health education records and home visits to assess client needs and concerns as they relate to their family, their community, and their health.
- Plans and leads group sessions and discussions on assigned health topics.
- Plans and organizes health fairs and other public events.
- Makes referrals to family support, health, and social service agencies in area, and follows up with individuals to ensure they receive needed services.
- Reduces stigma and other barriers to initiating or continuing health care by providing good information to both community members and health care providers.
- Develops relationships with local health care and social service providers to facilitate information sharing and service provision.
- Represents organization in meetings with community partners.

- Attends conferences as directed and/or required.
- Assists in completing other program goals and requirements, such as answering phone calls to the program hotline and greeting visitors to the office.
- Other duties as assigned.

Knowledge and Skills Required

- Ability to communicate easily with others, including demonstrating active listening skills
- Ability to maintain confidentiality
- Ability to take initiative
- Good judgment in work
- Strong work ethic
- Excellent problem-solving skills
- Information technology (IT) skills, including use of laptops, smartphones, internet/online application systems, web-based time tracking systems, Microsoft Office, etc.
- Flexibility in addressing changing community needs and program environment
- Ability to navigate complex systems and processes
- Ability to work independently and as part of a team
- Displays empathy, respect, and understanding of community values and members
- Ability to organize information, events, and program activities
- Must have, or obtain upon hire, knowledge of community resources, as well as programmatic goals and organizational values and processes

Required Education and Experience

- Knowledge of and/or is part of community served
- Ability to read, write, and speak **[language of target population]** required
- Knowledge of or experience with case management strongly preferred
- Experience in community work (especially *Promotor(a)* programs), education, health care, or related field preferred
- Reliable transportation, valid driver’s license, and insurance required
- TB test must be current

Program-Specific Requirements to be Completed Upon Hire

Be sure to add information about specific credentials, knowledge, or legal processes in this section. An example that can be modified to fit your organization's needs is provided below.

This position has state and federal requirements that need to be met. The candidate will complete 20 hours of Federal training and must pass examinations. In addition, the **[name of state]** Department of Insurance requires all *Promotores(as)* in **[name of state]** to undergo fingerprinting, Department of Public Safety, and FBI criminal background checks. The **[name of state]** education requirement is an additional requirement of **[number of hours]** of **[name of state]**-specific material, including the passing of a final exam. All training time and registration fees will be covered by **[organization name]**.

Appendix C: Tips for Recruiting Seasonal or Temporary *Promotores(as)* for Migratory and Seasonal Agricultural Worker Programs

1. Talk to outreach workers from Migrant Health Centers, migrant adult and child education, or any other social service agency that serves migratory and seasonal agricultural workers. Find out from them:
   - If there is an official list of camps or of businesses employing migratory and seasonal agricultural workers. Often, a state department of agriculture or labor creates this kind of list as part of licensing
   - Where the farms, camps, and other housing are located
   - The approximate number of people in each farm or camp
   - When migratory or seasonal workers usually arrive and leave at a given farm
   - If there are any camps where the grower disapproves of outsiders coming to the camp and, if so, which camps
   - Their suggestions about farms or camps that would be good for the program
   - Who the natural leaders are in the farms or camps
   - If they are willing to give you a "tour" or take you along during outreach so you can find out where each farm or camp is located
2. Choosing farms or camps to have a *Promotor(a)* is a compromise between several factors:
   - Where there is sufficient interest and a suitable number of candidates
   - What is practical in terms of location, travel distance, and time
   - Size of the farm or camp—it should have at least 50 people in order to reap the benefits of the program
   - The unmet health education and prevention needs of workers and camp residents—some farms and camps have less exposure to health promotion programs or may be more isolated from health services
   - Workers' or camp residents' amenability to the program—in some farms or camps it is extremely challenging to generate interest in the program. If you feel this is true after your second or third visit, try another farm or camp.

3. Talk informally to migratory and seasonal agricultural workers in the farm or camp about the program. Ask them, “Who would you go to if you needed help?” Often, these are the “natural helpers” who are already playing some of the same roles as a *Promotor(a*). They can also refer you to people who they think might be interested. People will feel more connected to the program if they helped choose the participants.
4. Introduce yourself and the program to the grower and/or crew leader. Find out when s/he expects workers to arrive. Ask for suggestions of who might be good *Promotores(as) de Salud*.
5. If your organization has outreach or health education events, such as health fairs, exercise classes, or English classes, ask if you can attend to promote the program and recruit candidates.
6. (For year two and beyond) Review last year’s list of participants and see if any former *Promotores(as)* have returned to the community this year. If they have, find out if they have phone numbers and call them up! Set up a time to interview them.
7. When meeting with a former *Promotor(a)*, ask if they know of any past *Promotores(as)* who are interested in participating in the program again this season. Ask the *Promotor(a)* if she or he can introduce you to other migratory and seasonal agricultural workers who might be good candidates for the program.
8. When recruiting, keep in mind the value of having a balance of males and females and a variety of experiences (new and former participants). Also, it may be important to find out how the candidates interact with each other (e.g., a former participant may alert you of a person who gossips or has conflicts with others).
9. As you meet potential candidates, hand out flyers with contact information and answer any questions. An effort should be made to make the program sound interesting enough so that the migratory and seasonal agricultural workers feel that it is a worthwhile time investment. It might also be useful to highlight any compensation they will receive for time lost at work. Ask them to think about it and tell them when you will be back to discuss it with them further.
10. If a candidate seems interested, set up a time to interview them and discuss the program in more depth. During that meeting, answer any questions about the program or the expectations.
11. If, after the interview, you plan to select a candidate, set up a time to discuss

the program with his/her spouse and family. Tell them what the program is about and ask if they are comfortable with their relative participating. Emphasize the importance of attendance, time commitments, and other requirements of the program. Explain that this may mean some adjustments on the part of the family, and ask them if they are willing to support the *Promotor(a)* in his or her new role.

12. Make several trips to the farm or camp during the recruitment process. Get to know the migratory and seasonal agricultural workers in order to select qualified and effective participants and to encourage other migratory and seasonal agricultural workers to turn to them for help and support.
13. Make sure you ask the participants to give you complete contact information. This will help you to remind them when intensive training is about to start and to contact them the following year.
14. Show the participants how to get to training by driving with them before the first day and giving them a map. Call them the day before training starts to remind them.
15. If necessary, talk to the crew leader to ensure the *Promotor(a)* can dedicate the necessary time to the job. If applicable, check to see if the *Promotor(a)* can leave work early to attend training.
16. Even after you have selected your group of *Promotores(as)*, continue to look for good candidates. Sometimes a participant will need to leave the program early and you will need to look for a replacement. Or, you may identify a good candidate for the following year. If you visit a farm or camp to do supervision, observe a group education session or attend an event. Pay attention to who seems particularly interested in the program or who volunteers to help.
17. Remember, have fun and demonstrate a positive outlook during the recruitment process! This is many migratory and seasonal agricultural workers' first impression of the *Promotor(a)* program, so you are setting the tone for what they can expect from their *Promotores(as)*.

Appendix D: Hiring a *Promotor(a)* Checklist

- ☐ Speak with your supervisor to determine needs/desires of program and brainstorm hiring options
- ☐ Determine if the position is a:
  - ☐ replacement: previous occupant's last day of work was **[date]**
  - ☐ new position as of **[date]**
  - ☐ seasonal (temporary) or year-round position for **[dates]**
- ☐ Funding Source Designated:**[dollar amount]**; amount allocated to position per year including benefits **[dollar amount]**
- ☐ Job Description reviewed and revised (attach original if one was submitted with grant proposal)
  - ☐ Job Description includes clear expected outcomes (both programmatic and related to working hours)
  - ☐ Job Description articulates only Knowledge, Skills, and Abilities (KSAs) that are definitely job related
  - ☐ Job Description reflects appropriate KSAs to others in the same job class (those within the same "level" in the organization)
- ☐ Determine where to advertise
- ☐ Develop job advertisement/posting
- ☐ Estimate cost of advertising
- ☐ Confirm that the grant funding the position can cover the costs of suggested advertisement

- ☐ Decide on hiring committee and ask if individuals are willing to serve (a hiring committee can review resumes, sit in on interviews, check references, and make recommendations)

- ☐ Determine necessary components of interview process (number of interviews, tours, if testing is involved and by whom, follow-up communication, etc.)

- ☐ Sketch out a tentative timeline of hire

- ☐ Develop interview questions

- ☐ Obtain all signatures and authorizations needed from your supervisor to hire

- ☐ Post internally as per Personnel Manual

- ☐ Place approved ad in designated places

- ☐ Schedule meeting times for approved committee to participate in the hiring process

- ☐ Complete interview process as designated

- ☐ Check references per approved guidelines and AFTER permission is obtained

- ☐ Review final results with supervisor and receive permission to offer and at what salary

- ☐ Make offer

- ☐ Compete letter of hire

Appendix E: Guidelines for Confidentiality Training and Sample Confidentiality Agreement

It is the Program Supervisor's responsibility to explain the importance of confidentiality to the *Promotores(as)* before they start working (ideally as part of training). When training the *Promotores(as)* on confidentiality, make it very clear how to protect confidentiality and help them succeed in meeting these expectations.

The following confidentiality guidelines have been created in consideration of the Health Insurance Portability and Accountability Act (HIPAA) of 1996. However, some Health Centers or other organizations may have additional confidentiality policies. Ask your organization about their confidentiality policies and observe them as required.

When you are talking with someone in your community:

- Try to find a private place or step away from others who can hear what you are saying.
- Ask the person if they are comfortable talking in that location or if they would prefer to go somewhere else.

When you are sharing with and learning from other Promotores(as) *during training:*

- Talk in general terms when speaking about people in your community.
- Protect peoples' identities by not giving specific identifying information (like names, addresses, or other personal information).

When you are filling out a Health Education Record, referral form, or any other type of form:

- Find a private place, away from others who can read what you are writing.
- Use some kind of covered clipboard so that others cannot see what you are writing.
- If using technology, be sure that the screen is only visible to you.

When you are completing Health Education Records, referrals forms, or any other identifying forms, before turning them in:

- Do not leave forms lying around where others can read them.
- Keep the forms covered so that family, friends, or others cannot read them.
- Completed health education records should be returned to your Program Supervisor on a set schedule.
- If you are storing forms or identifying information electronically, completely sign out of any software, application, or electronic data storage system when finished.

When you are calling an agency on behalf of a person in your community:

- Get permission from the person before you call.
- Only give the information that is necessary for the person to get assistance.

Sample Confidentiality Agreement

Name: Date:

Program Name:

I understand that I am required to maintain the confidentiality of the people in my community.

I understand that maintaining confidentiality means I should not share personal information or stories about the people in my community with others.

I understand there are exceptions to these rules:

1. I understand that I may share information about the people in my community with other *Promotores(as)* during training in order to learn and get advice from one another. I will talk in general terms to protect peoples' identities.
2. I understand that I may share information about the people in my community with my Supervisor during supervision meetings and when reviewing program forms.
3. I understand that I must talk to my supervisor if I believe someone in my community is in danger physically, mentally, or emotionally.
4. I understand that I may share information about a person in my community with other agencies if:
   - The person has given me permission
   - The information will help the person receive assistance

I understand that this confidentiality agreement continues and that I am required to maintain confidentiality after this program ends.

I understand that I may be asked to leave the program if I break the confidentiality of a person in my community.

I understand and agree to the confidentiality rules listed above.

Signature Date

I have reviewed this form with the *Promotor(a)* in detail and feel confident she or he understands **[organization's name]**'s confidentiality rules.

Supervisor/Witness Date

Appendix F: Orientation Checklist for *Promotores(as)*

This sample checklist details the tasks and documents you should be able to explain or collect from the *Promotores(as)* in your program in the first week or two. Of course, these are tasks that your own supervisor ideally explained to you first. Please adapt the checklist for your own purposes and organization. For example, some *Promotores(as)* may be seasonal and not employees of the organization, so they may need to complete different paperwork or have different expectations.

Part I

To be completed ahead of new hire's start date or within the first few days:

- ☐ Send an email to all staff announcing new employees or the *Promotores(as)*
- ☐ Circulate the new employee's resume or general information
- ☐ Specify documents needed by your organization from the employee, such as legal identification, driver's license, proof of car insurance, etc.

Part II

Note: These topics/tasks may be completed in any order.

DONE	TOPIC/TASK	RESOURCES TO USE
Getting paid and reimbursed/legal documents		
☐	Hiring and tax documents (W-4, I-9, etc.)	
☐	Timesheet or other payroll form	Your organization's electronic or paper timesheets or payroll forms. For non-employee *Promotores(as)*, use a stipend form or other pre-determined paperwork.
☐	How to get reimbursed for mileage	Your organization's Mileage Reimbursement Form
☐	How to order program supplies (credit card, purchase order, etc.)	Your organization's authorization forms

☐	How to purchase supplies tax free (if the organization has a tax exempt number)	Tax-exempt documentation
	What does your organization do?	
☐	Mission statement, vision, values, etc.	Your organization's brochure, Strategic Plan, website, or annual report (if available)
☐	History of organization	
☐	Current services and programs	Your organization's brochure, Strategic Plan, website, or annual report (if available)
	Who's who at your organization?	
☐	Staff in general	Organizational chart or staff directory, tour of organization to introduce staff
☐	Individuals who are key to program success (administrators, clinicians, outreach workers, receptionists, etc.)	
	Who's who in the community organizations?	
☐	Introductions to representatives of local organizations that *Promotores(as)* will work with or be familiar with	
	Target population	
☐	Background information about the target population nationally	Websites, documents from your supervisor or other staff
☐	Background information about the target population in the local community	Tour of the community; attend meetings with representatives of other relevant agencies
	***Promotor(a)* model**	
☐	Background information on Community Health Worker/ *Promotor(a)* Programs	
☐	Background on the program (if applicable)	Previous years' Program Reports
☐	Review program goals & objectives (if applicable)	Grant proposal for your program

☐	Existing program supplies (manuals, books, flipcharts, pamphlets, etc. from previous years)–if applicable	
Benefits, policies, etc.		
☐	Personnel Policies and Procedures	Your organization's Personnel Policy Manual (if applicable)
Office		
☐	Mailboxes	
☐	Supply closet contents and use	
☐	Correspondence	Letterhead, note cards, postcards, envelopes
☐	Mail–stamps, weighing postage, out-going mail	
☐	Business cards–blank or personalized (if applicable)	
☐	Keys to the office, meeting space	
☐	How to use the phones	
☐	How to use the copier	
☐	How to use the fax	
☐	Shared paper files–what goes where?	
Computers		
☐	Location of assigned computers	
☐	How to log on to computers	Organization's IT Policy
☐	Where to save files (folders, etc.)	
☐	How to access Internet and email	
☐	How to print	

Appendix G: Step by Step: How to Lead a Training with *Promotores(as)*

Before the training:

- Think about what stage the group is at. Do the *Promotores(as)* need to get to know each other? Learn to function as a group? The dinámica, game, or exercise you choose should serve to strengthen the team.
- Choose a topic for the training. This topic may come from:
  - » the goals and objectives of your program
  - » the priorities the *Promotores(as)* have chosen based on their knowledge of the community
  - » supervision or evaluation–additional needed information or skills
  - » topics the *Promotores(as)* say they are interested in
  - » a special opportunity for a guest presenter or to participate in an event (e.g., preparing to do blood pressure screening at a health fair)
- List the main ideas, skills, or information for the training. This will help you figure out which presenters or activities are needed.
- Contact a guest presenter or find a curriculum or other resources to teach the topic. Once you have confirmed a guest presenter, be sure to send them a reminder letter and driving directions.
- Plan activities to review the information you or the trainer have presented. Research shows that people need to hear information three times before they remember it. A review can also help the *Promotores(as)* practice sharing this information with others.
- Create an agenda to give to the *Promotores(as)* in advance; write a more detailed outline for yourself. An agenda helps the *Promotores(as)* know "where you're going," and how long they can expect it to take. If people know when there will be a break, how many topics will be covered, etc., they will be less likely to get impatient or anxious. An outline for yourself can help if you "go blank" in front of the group.

The day of the training:

- Set up the room and furniture. Placing chairs in circle or around a table allows *Promotores(as)* to interact with each other as well as the presenter.
- Get any audiovisual equipment ready.

- Prepare any snacks or drinks.
- Set out agendas, attendance list, and any supplies, such as pens, paper, etc. Have handouts and health education materials handy.
- Get there early to welcome people.

During the training:

- Start on time. By starting on time, you respect the time of the people who did arrive punctually. You also send a strong message to those who are late that "you missed something."
- Welcome the group. If there is a guest, introduce him or her, and have each person introduce themselves. Be respectful of the guest's time and allow him or her to present following their introduction.
- Review the day's agenda.
- Do a "check-in." Find out what the *Promotores(as)'* experiences with the topic are and what they hope to learn.
- Use a variety of Popular Education teaching methodologies to present the information. This is important so that people with different learning styles will fully grasp the material being covered.
- Build in opportunities for team building. This can be through problem-solving activities, or in a specific team-building activity. If you do a team-building activity, choose it based on the needs of the group. For example, do a name game if there is a new person, or an "energizer" if you need to get people to wake up.
- If the training is over one and a half hours long, take a five-to-10 minute break.
- Review new information with the group. A review can be in the form of a discussion, a test, a game, or contest.
- Hand out any additional printed materials. Passing out handouts at the end of the training ensures that people won't be reading while you want their participation in an activity. It also gives you a chance to reinforce what the materials are for ("please read at home," "please give them out during encounters," etc.)

After the training:

Ask yourself:

- What went well? What would you do differently next time?
- What other information or training do the *Promotores(as)* need? This can

be the start of planning your next training.
- What other opportunities for on-going education would the *Promotores(as)* benefit from?

Appendix H: Step by Step: How to Lead Individual or Group Supervision Meetings with *Promotores(as)*

Before the Meeting:

- Schedule a date, time, and place for the meeting.
- Review the *Promotor(a)*'s paperwork. Flag those that need changes or that were very good.
- Think about the *Promotor(a)*'s performance in training, out in the community, on the objectives. What was good? What needs more work?
- What supplies, kits, or other materials does the *Promotor(a)* need? Take them to the supervision meeting.

During the Meeting:

Part 1: "Check-In"

First, you should check-in with the *Promotor(a)* or *Promotores(as)*. Who helped someone in a new way? Who led a group session? How did it go? Encourage the *Promotor(a)* or *Promotores(as)* to share both successes and challenges.

- Share any "updates" on a policy, resources in the community, the program, etc.
- Present a summary of the results you are getting from the program. Show the *Promotores(as)* what they have achieved individually and/or as a group, such as encounter numbers, referrals, or anecdotes.
- If conducting a group meeting, make an opportunity for team building. This can be in problem-solving, in activities to learn the new information, or in a specific team-building activity. If you do a team-building activity, choose it based on the needs of the group. For example, an icebreaker can help *Promotores(as)* get to know each other, a problem solving exercise can help people to work together, etc.

Part 2: Issues and Concerns

In both group and individual meetings, you and the *Promotor(a)* or *Promotores(as)* should both verbally raise any issues or concerns you have. These may be areas of needed improvement, congratulations on a job well done, or personal issues.

First, ask the *Promotor(a)* or *Promotores(as)*:
- "How are things going for you?"
- "How are you feeling about the program?" Problem-solve any issues that have come up.
- "How are things going in the community?" If there are challenges, talk about how to solve them. You may need to help connect the *Promotor(a)* with health or social services. If the *Promotor(a)* mentions something she or he did, make sure the proper paperwork was completed.

After you have listened to the *Promotor(a)* or *Promotores(as)* and discussed their concerns, raise any issues you have (ideally these should include BOTH good things and areas for improvement). In individual meetings, you can also dedicate time to a *Promotor(a)*'s specific needs and review any material or information they need extra assistance with. If the *Promotor(a)* has missed training, this is a good time to give her or him the materials and briefly cover the content she or he missed.

Part 3: Promotor(a) *Feedback & Thoughts*

Ask the *Promotor(a)* or *Promotores(as)*:
- If there was a recent training: "What did you think of the last training?" "How could it be improved?" "Was there anything that was confusing to you in the training?" Review this information with them.
- "What would you like additional training on?"
- "How are you feeling about the paperwork, expectations, group sessions, and other activities we are doing?"
- If it is an individual meeting, "How do you feel about working with the other *Promotores(as)*?"
- "How can I improve as a supervisor?"

Remain objective and encourage the *Promotor(a)* or *Promotores(as)* to voice any thoughts that she or he has.

Part 4: Activities & Data Collection

- For individual meetings, review the paperwork documenting health education activities of the *Promotor(a)*. Talk first about those that were especially good. Then talk about those that need to be changed. Address any issues with documentation directly. Discuss any unusual experiences. For a group meeting, discuss any trends found in the paperwork, such as an increase in the number of patients with similar health concerns or common errors found in the paperwork.
- Go over the specific program objectives and help the *Promotor(a)* or *Promotores(as)* figure out how to meet them. Make a note of each *Promotor(a)'s* progress for each objective.
- For individual meetings, help the *Promotor(a)* plan for upcoming events or program activities. For group meetings, keep planning broader and focused on activities or events that will impact the entire group. Give the *Promotores(as)* lots of encouragement and help in planning and practicing.
- Occasionally, join each *Promotor(a)* while they are working in the community. That way, you can model how to do the work and also give feedback on her or his performance.
- Discuss any special events or projects you are preparing for.

Part 5: Agreements

If in Parts 1, 2, 3, or 4 there were concerns raised which must be addressed, it may be useful to make an agreement between the *Promotor(a)* or *Promotores(as)* and yourself. These agreements should be mutually decided and agreed upon and initialed by all parties involved.

For example, if a *Promotor(a)* did not complete the expected number of health education activities, set an agreement about how many she or he will complete before the next meeting.

Finally, review the commitments of each person until the next meeting. For example: attendance at health fairs or other events, materials they should bring to the next meeting, etc.

After the Meeting:

Make a note to remind yourself what you agreed to do in order to meet the needs of the *Promotores(as)*. For example, if a *Promotor(a)* has a specific question about a health topic that you cannot answer, you should write down the question, indicate that you need to find the answer, and the date when you will get back to the *Promotor(a)* with the answer. Make sure you follow through on any commitments you made.

Appendix I: Performance Evaluations or Assessments

Evaluation Questions for *Promotores(as) de Salud*

1. ***¿Cuáles son los desafíos más grandes (o las cosas más difíciles) para Ud. como Promotor(a) de Salud?***
   What are the biggest challenges for you as a *Promotor(a)*? What have been the most difficult parts of your work?

2. ***¿Recibió suficiente apoyo, supervisión y materiales para cumplir su trabajo como Promotor(a)? Si no, ¿qué más hubiera sido de ayuda?***
   Did you receive enough support, supervision, and supplies to do your work as a *Promotor(a)*? If not, what else would have been helpful?

3. ***¿Qué es lo que más le ha gustado de su trabajo como Promotor(a)?***
   What have you liked best about your work as a *Promotor(a)*?

4. ***¿Cómo podríamos mejorar sus experiencias como Promotor(a)?***
   How could we improve your experiences as a *Promotor(a)*?

5. ***¿Cómo cree que el programa está ayudando a la gente en su comunidad? Ha visto algún cambio en el comportamiento de la gente como resultado de su trabajo como Promotor(a)?***
   How do you think the program is helping people in your community? Have you seen a change in people's behavior as a result of your work as a *Promotor(a)*?

6. ***¿Qué podría hacer el programa para ayudar a la gente más? ¿Qué podrían hacer los Promotores/as? ¿Qué podría hacer el personal del programa?***
   What could the program do to help people more? What can the *Promotores(as)* do? What can the program staff do?

7. ***¿Cuáles son las necesidades de salud más importantes para su comunidad que Ud. ha visto?***
   What are some of the most important health needs in your community that you have seen?

8. ***¿Hay algo que habría hecho de otra manera este último año?***
   Is there anything you would have done differently this past year?

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