Volunteer Risk and Program Management: Exciting Ideas

Michelle Boudreau, RI SHIP/SMP and Rebecca Hayward, OH SHIP
RHODE ISLAND

VOLUNTEER RISK AND PROGRAM MANAGEMENT
“VRPM IN THE OCEAN STATE”
RHODE ISLAND IS THE SMALLEST STATE IN THE UNION LOCATED BETWEEN CONNETICUTT AND MASSACHUSETTS
WaterFire
Providence

Downtown Providence, Rhode Island
2016: Rhode Island population = 1,059,639

- Rhode Island Residents over the age of 65 (16.5%)
SHIP at the Rhode Island Division of Elderly Affairs

- State Health Insurance Assistance Program
- Toll-free number is 1-888-884-8721
- RI has a total population of 1.06 million people
- RI has 208,000+ Medicare Beneficiaries
- SHIP, SMP and ADRC are integrated at the state level
- Eighty-Seven total SHIP staff in RI @ state, regional and local agencies
- RIDEA has been the SHIP grantee since the inception of SHIPs in the early 1990’s
IMPLEMENTATION OF SMP IN RI

• 2006 - A Statewide SMP project

• 2011 - SMP Volunteer Coordinator

• 2014 – Integrated Partners
2011

• In 2011, Rhode Island was fortunate to receive an additional one year of funding. This funding was used to hire an SMP Volunteer Coordinator to oversee the implementation of AoA/ACL SMP Volunteer Risk and Program Management (VRPM) policies, to enhance and support the RI SMP volunteer workforce recruitment, screening, training, and management.
In 2013, RIDEA evaluated various core programs to determine if there were ways to improve our effectiveness and efficiency in service delivery. This evaluation resulted in RIDEA electing to integrate the delivery of SHIP (Senior Health Information Program), SMP, MIPPA (Medicare Improvement for Providers and Patients Act) and ADRC (Aging and Disability Resource Center) services for populations served by RIDEA.
As a result, responsibility for these programs throughout the state now is divided among six (6) regions, with each lead agency having responsibility for the delivery of these programs in an integrated, coordinated and efficient manner within a specific geographic region of the state (providing statewide coverage).

The new integrated project began on January 1, 2014. Each grantee is required to collaborate and partner with at least two (2) established Rhode Island local community organizations within their region, to reach the targeted populations.

Because of this new structure, the “Rhode Island Integrated Partners” are better positioned to reach targeted populations throughout the state- with no increase in overall funding.
VOLUNTEER RISK AND PROGRAM MANAGEMENT (VRPM)

VOLUNTEER RECRUITMENT

• VOLUNTEER FLYER POSTED:
  RI Department of Human Services field Office locations
  Senior Centers
  Libraries
  Housing Authorities
  Innovated Living Projects – these are usually SMP only volunteers

• EVENTS:
  Rhode Island Housing Complex
  Narragansett Indian Tribe Health Fairs
  Community Events
  Senior Nutrition Meal Sites
Do you enjoy helping others?  
Looking for a volunteer opportunity?  

Join the Senior Medicare Patrol or the  
State Health Insurance Assistance Program  

Senior Medicare Patrol (SMP)  
The mission of the SMP program is to empower and assist Medicare beneficiaries, their families, and caregivers to prevent, detect, and report health care fraud, errors, and abuse through outreach, counseling and education.  

State Health Insurance Assistance Program (SHIP)  
SHIP provides free unbiased, conflict-free, confidential counseling and assistance to help beneficiaries better understand their Medicare benefits, the supplementary programs associated with Medicare, and programs that help beneficiaries to pay for the costs associated with Medicare.  

For additional information, please call:  
Michelle Boudreau  
Rhode Island Division of Elderly Affairs  
(401) 462-0194  

"This was supported in part by a grant from the Administration on Aging (AoA), Administration for Community Living (ACL), U.S. Department of Health and Human Services (DHHS). Grantees carrying out projects under government sponsorship are encouraged to express freely their findings and conclusions. Therefore, points of view or opinions do not necessarily represent official AoA, ACL, or DHHS policy."
BECOMING A SMP/SHIP VOLUNTEER IN RHODE ISLAND

• First Contact - emails, phone calls

• Application process — once application is returned to office the following is done:
  • Review application, call references
  • Set up interview with integrated partner and volunteer, and conduct interview
  • Go over interview questions with integrated partner to see where volunteer will fit best
VRPM CONTINUED

• ORIENTATION:
  • Welcome Volunteer
  • Review Volunteer Handbook
    
    Go over all chapters in handbook with volunteer
    
    Do all forms with volunteer
      
      SMP/SHIP Volunteer Agreement
      
      Code of Ethics
      
      Confidentiality
      
      Background checks for positions of trust (done every 5 years)
      (First Advantage used for background checks)
      
      Drivers license form signed if driving to different locations
State of Rhode Island
Division of Elderly Affairs

EMPOWERING SENIORS, PRESERVING INDEPENDENCE AND ENRICHING LIVES

RHODE ISLAND
SMP/SHIP VOLUNTEER HANDBOOK
# TABLE OF CONTENTS

## ORGANIZATIONAL STRUCTURE

## CHAPTER 1: SMP PROGRAM

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome and thank you letter from AoA Official</td>
<td>1</td>
</tr>
<tr>
<td>History of the SMP Program</td>
<td>1</td>
</tr>
<tr>
<td>SMP Program Milestones</td>
<td>2</td>
</tr>
<tr>
<td>Rhode Island SMP Project History</td>
<td>3</td>
</tr>
<tr>
<td>What is the SMP Program</td>
<td>4-5</td>
</tr>
<tr>
<td>RI Division Elderly Affairs Contacts</td>
<td>5</td>
</tr>
<tr>
<td>SMP Regional Partner Agencies</td>
<td>6</td>
</tr>
<tr>
<td>Volunteer Roles</td>
<td>7</td>
</tr>
<tr>
<td>SMP Orientation and Training</td>
<td>8-12</td>
</tr>
<tr>
<td>Insurance</td>
<td>12</td>
</tr>
<tr>
<td>Recognition</td>
<td>13</td>
</tr>
<tr>
<td>Volunteers with Disabilities</td>
<td>13</td>
</tr>
</tbody>
</table>

## CHAPTER 2: SHIP PROGRAM

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>MEDICARE TIMELINE</td>
<td>14</td>
</tr>
<tr>
<td>History of the SHIP</td>
<td>15</td>
</tr>
<tr>
<td>Volunteer Roles</td>
<td>15</td>
</tr>
<tr>
<td>SHIP Regional Partner Agencies</td>
<td>16-17</td>
</tr>
<tr>
<td>RI Division of Elderly Affairs Contacts</td>
<td>17</td>
</tr>
<tr>
<td>RI SHIP Project Goal</td>
<td>18</td>
</tr>
<tr>
<td>SHIP Orientation and Training</td>
<td>18-37</td>
</tr>
<tr>
<td>Insurance</td>
<td>38</td>
</tr>
<tr>
<td>Performance Management</td>
<td>38-39</td>
</tr>
<tr>
<td>Recognition</td>
<td>40</td>
</tr>
<tr>
<td>Volunteers with Disabilities</td>
<td>40</td>
</tr>
</tbody>
</table>
CHAPTER 3: APPENDIX A-C

Appendix A
  Volunteer Roles 41-50
Appendix B
  Incident Report Form 50-54
Appendix C
  Volunteer Procedure for Filing Grievance or Complaints 55-58
  Volunteer Complaint Form 59-60

CHAPTER 4: SMP/SHIP VOLUNTEER RISK AND PROGRAM MANAGEMENT POLICIES

Section 1.0: Introductory Policies 61
Section 2.0: Risk Management and Health and Safety 62
Section 3.0: Volunteer Program Management 63-70
Section 4.0: Information Technology 71

CHAPTER 5:

Rights and Responsibilities 72-77
Volunteer Separation 75-76
Abbreviations and Acronyms 76-77
Definitions of Terms 77-79
NEW ENGLAND FALL FOLIAGE
Rhode Island
ANNUAL RECERTIFICATION’S

- RI SMP/SHIP Annual Recertification’s

- Annual form (1st page) done by Integrated Partner Volunteer Coordinator
- 2nd page done by State Volunteer Coordinator
- Forms signed on a yearly basis:
  - SMP/SHIP Volunteer Agreement
  - Code of Ethics
  - Confidentiality
  - Background checks if in a position of trust (every 5 years, first advantage used)
  - Drivers License/Insurance forms completed (if driving to different locations)
Rhode Island SMP/SHIP Volunteer Review and Annual Check-In Form

Name of Volunteer: ____________________________ Date of Review: ___________________
Volunteer role(s) in SMP/SHIP: ________________________________________________________

**SMP/SHIP Supervisor and Volunteer Discuss Questions 1-3 Together:** (Supervisors see instructions and prepare before meeting.)

1. Describe and discuss what the volunteer has done with the SMP/SHIP program over the past year, including any achievements:
   ________________________________________________________________________________
   ________________________________________________________________________________
   ________________________________________________________________________________
   ________________________________________________________________________________

2. Describe and discuss the volunteer’s strengths and what the volunteer is doing well:
   ________________________________________________________________________________
   ________________________________________________________________________________
   ________________________________________________________________________________
   ________________________________________________________________________________

3. Describe and discuss any areas in which further guidance/training would be helpful. Include suggested steps for how to address this area:
   ________________________________________________________________________________
   ________________________________________________________________________________
   ________________________________________________________________________________
   ________________________________________________________________________________

*Scheduled date of follow up meeting if needed: ___________________
4. Do you find your volunteer role with the SMP/SHIP program to be meaningful and/or rewarding?

____YES  ____NO  ____SOMEWHAT

Comments: ____________________________________________________________________
____________________________________________________________________________

5. Have you received sufficient feedback in your work as a SMP/SHIP volunteer?

____YES  ____NO  ____SOMEWHAT

Comments: ____________________________________________________________________
____________________________________________________________________________

6. What do you like most about volunteering for SMP/SHIP?

____________________________________________________________________________

7. What do you like least about volunteering for SMP/SHIP?

____________________________________________________________________________

8. Would you like to remain in your current SMP/SHIP role(s)? Are there any changes you would like to make?

____________________________________________________________________________

9. Do you have any additional comments?

____________________________________________________________________________
____________________________________________________________________________

10. What is your current emergency contact’s name, phone number and relation to you?

____________________________________________________________________________

11. Would you be willing to assist with recruiting other volunteers?

____YES  ____NO
WINTER
Roger Williams Park, Rhode Island
MANDATORY ANNUAL TRAININGS
AND
VOLUNTEER RECOGNITION

• WORK PLACE SAFETY FOR VOLUNTEERS
• BOUNDRIES AND CODE OF ETHICS
• CULTURALLY AND LINGUISTICALLY APPROPRIATE SERVICES (CLAS)
• HIPAA - CONFIDENTIALITY
• ELDER ABUSE
• INFORMATION TECHNOLOGY
• VOLUNTEER RECOGNITION
2017 Annual Training/Volunteer Recognition Day
You are cordially invited to attend our RI SMP/SHIP Integrated Training and Volunteer Recognition Luncheon to be held at the Kirkbrae Country Club, 197 Old River Road, Lincoln, RI 02865 on May 10, 2017 from 8:30-4:00.

This all-day training will provide essential information to our volunteers and staff in accordance with the Administration for Community Living (ACL) “Volunteer Risk and Program Management” (VRPM) requirements.

Please RSVP to Michelle Boudreau, SMP/SHIP Volunteer Coordinator at 462-0194 or michelle.boudreau@dea.ri.gov by April 26, 2017.

5 Reasons Our Volunteers Are Unforgettable:

They Plant The Seeds Of Kindness
They Always Remember To Spread Cheer
Their Caring Ways Nurture Others
They Help Our Organization GROW
They’ve Earned A Garden Of Thanks
RHODE ISLAND
DIVISION OF ELDERLY AFFAIRS

OUR APPRECIATION
"GROWS AND GROWS"

Plant needed herb shape, add water and sun and watch me grow.
8:00-8:30  REGISTRATION/CONTINENTAL BREAKFAST
8:30-8:40  WELCOME- Director Charles J. Fogarty, RI Elderly Affairs (RIDEA)
8:40-9:00  INFORMATION TECHNOLOGY-Terry Haydt, RIDEA
9:00-9:30  ELDER ABUSE – Maryann Ciano/Peter Graham-PROTECTIVE SRV.-RIDEA
9:30-10:15  CULTURALLY AND LINGUISTICALLY APPROPRIATE SERVICES –CLAS RI DEPARTMENT OF HEALTH-Neha Patel
10:15-10:30  BREAK
10:30-11:30  BOUNDARIES AND ETHICS-RI ETHICS COMMISSION-Jason Gramitt
11:30-12:00  RECOGNITION EVENT
   “PLANTING SEEDS OF LOVE THAT HELP COUNTLESS HEARS TO GROW”
   “Volunteer Group Picture”
12:00-1:00  LUNCH
1:00-2:00  OCEAN STATE CENTER FOR INDEPENDENT LIVING (OSCIL)
   • The Gift of Hearing Program – Michelle Machado
   • YMCA-promoting increased socialization and recreation-Tracy Martone
   • Nursing Home Transition-Michelle Machado
2:00-2:45  SAFET IN THE WORKPLACE-David Johnston, RI Dept of Health
2:45-3:00  BREAK
3:00-3:45  SMP/SHIP BINGO
3:45  DOOR PRIZE (Volunteers only-Must be present to win)
SPRING
Providence, Rhode Island
WHAT’S ALL THE BUZZ ABOUT?

BEE READY TO ATTEND OUR MANDATORY ALL-DAY RI SMP/SHIP INTEGRATED TRAINING & VOLUNTEER RECOGNITION LUNCHEON AT KIRKBRAE COUNTRY CLUB, LINCOLN, RI APRIL 26, 2018
REGISTRATION /BREAKFAST STARTS AT 8:00AM

THIS ALL-DAY TRAINING WILL PROVIDE ESSENTIAL INFORMATION TO OUR VOLUNTEERS AND STAFF IN ACCORDANCE WITH THE ADMINISTRATION FOR COMMUNITY LIVING (ACL) “VOLUNTEER RISK AND PROGRAM MANAGEMENT” (VRPM) REQUIREMENTS

PLEASE RSVP TO MICHELLE BOUDREAU, SMP/SHIP VOLUNTEER CORRDINATOR AT 462-0194 OR MICHELLE.BOUDREAU@DEA.RI.GOV BY MARCH 31, 2018

THE BEE IS MORE HONORED THAN ANY OTHER, NOT BECAUSE SHE LABORS, BUT BECAUSE SHE LABORS FOR OTHERS!!!!!!
RI SMP/SHIP INTEGRATED TRAINING / VOLUNTEER RECOGNITION LUNCHEON
Kirkbrae Country Club 197 Old River Road, Lincoln, RI
APRIL 26, 2018
Agenda

8:00-8:30  REGISTRATION/CONTINENTAL BREAKFAST
8:30-8:45  WELCOME - Director Charles J. Fogarty, RI Division of Elderly Affairs (RIDEA)
8:45-9:45  HIPAA Presentation – Michelle Boudreau, RIDEA
9:45-10:15 SAFETY IN THE WORKPLACE – Mireya Antezana, DOH
10:15-10:30 BREAK
10:30-11:30 BOUNDARIES AND ETHICS – Jason Gramitt, RI Ethics Commission

11:30-12:00  RECOGNITION EVENT
              “Volunteer Group Picture”
12:00-1:00  LUNCH
1:00-1:45  NEW MEDICARE CARDS – CMS – Maureen Kerrigan, Aaron Smith
1:45-2:15  ELDER ABUSE – Boakai Kamara, RIDEA
2:15-2:30  BREAK
2:30-3:15  OCEAN STATE CENTER FOR INDEPENDENT LIVING (OSCIL)
              The Gift of Hearing Program – Michelle Machado
              YMCA – promoting increased socialization and recreation- Amanda Reed
              Nursing Home Transition – for consumers wishing to live in the community
              Michelle Machado
3:15-3:45  SMP/SHIP SPIN THE WHEEL
3:45  DOOR PRIZE (Volunteers only – MUST BE PRESENT TO)
2018 Annual Training/Volunteer Recognition Day
I can’t believe another year is here,
Helping our elders both far and near,
Beautiful people with long memories to share,
We enjoy showing how much we care!

They reach out to us when bewildered,
Finding the right answers they never considered,
Dazzled by our large wealth of knowledge,
For our clients who we aim to encourage!

We belong to a very special group,
Dedicated, honest and "in the know" loop,
Our training today speaks of our devotion,
For keeping our elderly services unbroken.
RI SMP/SHIP WHEEL GAME

- VRPM
- PART D
- DME
- SOCIAL SECURITY
- SMP
- HISTORY OF MEDICARE
- NAME THAT PROGRAM
- TERMS AND ACRONYMS
- PART C
- PART A/B
Recognition Event!
Volunteer Group Picture

April 26, 2018
Sponsored by the
Division of Elderly Affairs
RHODE ISLAND SMP/SHIP TEAM

MARY LADD
SHIP DIRECTOR

ALEATHA DICKERSON
SMP PROJECT DIRECTOR

MICHELLE BOUDREAU
SMP/SHIP VOLUNTEER COORDINATOR

CHRISTINE SMITH
CHIEF RESOURCE SPECIALIST

KIM TIMPSON
HUMAN SERVICES POLICY & SYSTEMS SPECIALIST

RI SMP LINE – 401-462-0931

RI SHIP LINE: 1-888-884-8721
OVAB: OSHIIP Volunteer Advisory Board
Session Goals

• What is a volunteer advisory group?

• How to implement a volunteer advisory group?

• Successes of a volunteer advisory group
O-HI!-O
Mission Statement

• The purpose of OVAB is to assist the Ohio Senior Health Insurance Information Program (OSHIIP) enhance the efficiency and productivity of their statewide volunteer corps. OSHIIP will utilize OVAB’s collective professional expertise, regional knowledge, and experience as OSHIIP volunteers on matters such as: volunteer education, volunteer recruitment, volunteer retention, special interest beneficiary outreach, and the technological enhancement of both beneficiaries and volunteers regarding Medicare and other important health issues relating to older Americans.
The purpose of this memorandum is to establish an agreement between the Ohio Senior Health Insurance Information Program and OSHIIP’s Voluntary Advisory Board Members as the parties work together toward the mission of enhancing the efficiency and productivity of the OSHIIP statewide volunteer network. The OSHIIP staff representative assigned as the OVAB moderator, in this case, OSHIIP Outreach Specialist Rebecca Hayward, will oversee issues pertaining to the MOU.

Term Length:

This agreement is valid two year as determined on the SHIP grant year, April 1, 2018 – March 31, 2020.

Responsibilities for OVAB:

• **Advisory role only, no voting power.** OVAB members will use experience, expertise, regional knowledge, and personal experiences as an OSHIIP volunteer or coordinator to help improve and grow the volunteer network.

• **Attend at least two of the four face-to-face meetings** during the term length. If OVAB member cannot attend, the OVAB member must notify the OSHIIP representative of absence. No alternate representative is necessary.

• **Participate in at least eight monthly telephone/web conference calls** during the two-year term. If OVAB member cannot attend, OVAB member must notify OSHIIP representative of absence. No alternate representative is necessary.

• **Present ideas to OSHIIP staff representative and implement ideas to region or county coordinators and volunteers to be used as a model for other county coordinators and volunteers to follow.**
MOU con’t

Responsibilities of OSHIIP:
• Establish and update a calendar.
• Set up meeting locations and telephone/web conference calls.
• Moderate meetings.
• Record and distribute meeting minutes.
• Recruit and contact new OVAB members.
• Distribute and market OVAB ideas to volunteers and coordinators through newsletter, website, trainers and home office.

Termination Procedure:

If an OVAB member wants to terminate the agreement before the end of the term, he/she must notify the OSHIIP representative with his/her reason in writing prior to the next OVAB meeting – either quarterly or conference call – so the announcement can be included in the next meeting’s agenda. During the next meeting the OVAB members can decide if they want to find a replacement to fulfill the exiting member’s role or if they want to continue the term with one member short.

If OSHIIP wants to terminate the agreement before the end of the term, the OSHIIP representative must notify the OVAB member with the reason in writing prior to the next meeting – either quarterly or conference call – so the announcement can be included in the next meeting’s agenda. During the next meeting the OVAB members can decide if they want to find a replacement to fulfill the exiting member’s role or if they want to continue term with one member short.
Selection Process

• “Secret” Club
• Different areas of the state
• Different representatives of an OSHIIP volunteer (“snapshot”)
• Highlight Exceptional volunteers
• Boost volunteers
• Gender
Topics

• Part D roll-out
• Volunteer recruitment, volunteer organization
• Check Up events/Welcome to Medicare
• NPR Reporting
• Plan Finder tool
• Funding
• Med Sup redesign
• VPRM
Typical Agenda

- **Welcome!**
- **OSHIIP updates:**
  - Volunteer Training Webinars; March 20, 10/2pm: Med Sup vs MA; April 17, 10/2pm: new Medicare Cards; May 16, 10/2pm: Part D Review; June 12, 10/2: SSA
  - W2M Webinars (beneficiary focus): Feb. 13, 6pm; Mar 15, 4pm; April 4, 4pm; April 18, 6pm; May 9, 4pm; May 16, 6pm
  - W2m Seminars
    - List: [http://insurance.ohio.gov/Consumer/OSHIIP/SitePages/WelcomeToMedicare.aspx](http://insurance.ohio.gov/Consumer/OSHIIP/SitePages/WelcomeToMedicare.aspx)
    - Postcards
  - Med Sup guide redesign
  - Weekly/Newsletter changes
  - Staff Updates
  - Funding Update
- **Old Business:**
  - Medigold: SEP Approved
  - New Medicare Cards
  - OPERS: One Exchange is changing names to Via Benefits March 1
- **New business:**
  - 2018 LIS and MSP
  - Premier Health: Contract terminating
We Love OVAB!

• “I am excited to be a part of OVAB because I really enjoy the collaboration with other volunteers and staying informed of changes and resources to help the people we serve.”

• “I like being able to help people get the best health care possible. The support I receive from other OVAB members is incredibly helpful.”

• “Unique situations are always coming to light with the board, along with innovative remedies. The open communication with other volunteers throughout the State is a remarkable experience.”

• “OVAB gives me the opportunity to learn new information to help my clients, which makes it all worthwhile and rewarding.”
QUESTIONS?

Contact: Becky Hayward

Rebecca.Hayward@insurance.ohio.gov

614-728-1043
Discussion