Training, Retraining and Retaining Your Valued Volunteers

Becky Hayward, OSHIIP
Caroline Louise Cole, MA SMP

2019 SMP/SHIP National Conference

July 22–25, 2019 • San Diego, CA
About OSHIIP

- SHIP Only
- Ohio Department of Insurance
- 600+ Volunteers
  - In-kind
  - True Volunteers
- Statewide Hotline
- 17 Staff
  - Hotline
  - Community Liaisons
• Offered an initial training for new volunteers that lasted days.
  – Four days
  – Five days
  – 22 hours
  – CEU’s
  – Printed training guide
Initial Training

- Staff spent many hours traveling to the training sites.
- More than half of those trained did not follow through with the volunteer requirements
  - Annual refresher
  - Regular reporting
- Terminated one year later
Not Sustainable

– Current volunteers were neglected
– Trainers were exhausted
– Lots of driving time - $
– Lots of printing -$
– No time for beneficiary and partner outreach and education
Transitioning to Online

• Developed own online training
  – Internal issues
  – But still had one or two face-to-face trainings in larger cities
  – Attend a NVT follow-up
  – Still offered CEUs
  – Final Test
Today

- SHIP TA center training modules
- Final test
- One-on-One Volunteer orientation
  - Go over material
  - Final test
  - Reporting!
  - Volunteer responsibilities
Positives

- Staff can spend more time in the field
  - mentoring, networking and outreach
- Improve volunteer participation, retention and client contact reporting.
- Webinars
- Focused/personalized face-to-face training
- Less travel and time for attendee
Better Volunteers

• SHIP volunteers need to be comfortable on a computer
• Medicare boot camp
• Online resources
• No CEUs (tbd)
• One-on-one volunteer orientation
  – Talk about reporting
Challenges

• Keeping track
• Some volunteers are not computer learners
• Personal interaction
• No CEUs (tbd)
Successes

• Fewer terminations
• Better reporting
• Can train anyone at any time
• Focus more on retention
About the Massachusetts Senior Medicare Patrol

- Senior Medicare Patrol only
- Three-person staff
- 40 to 60 active volunteers at any given time across the state.
- Partners with community based organizations including Ma SHINE (SHIP) and AARP.

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We distribute materials in seven languages – Chinese, Korean, Portuguese, Russian, Spanish, Portuguese and, of course, English.
Massachusetts SMP

• We hold regular Statewide Conferences and involve our volunteers as planners and panelists.
• We hold a semi-annual Volunteer Training Retreat.
• We invite our volunteers to suggest, write and edit our outreach materials.
• We hold regular Outreach and Education conference calls for our presenters.
• We hold regular Case Management conference calls for our case managers.
We believe that involving volunteers at the planning level shows them how valuable they are in the success of our program.
Massachusetts SMP Volunteer Retreats

• We choose varied and attractive settings from high-end conference facilities with the latest technology to botanical gardens, Mass Audubon sites, and even an Benedictine abbey conference center.
• Attendance is not mandatory but is encouraged by the offer of breakfast and lunch and mileage reimbursement.
• We involved our volunteers in planning by holding regular Volunteer Retreat Planning Conference Call.
# Volunteer Retreat Agenda

## Massachusetts Senior Medicare Patrol Program

**SMP Team Member Retreat**  
**Mondau, May 20, 2019**  
9:00 a.m. to 3:00 p.m.  
Harvard-Pilgrim Office Building  
Conference Room 1038  
35 Worcester St., (Route 9)  
Wellesley, MA 02481

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
<th>Facilitator</th>
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<tbody>
<tr>
<td>9:00 a.m.</td>
<td>Check-in and Continental Breakfast</td>
<td>Lucyila Prado and Martha Leen</td>
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<tr>
<td>9:30 a.m.</td>
<td>Welcome and Introductions; Goals and Objectives for the day</td>
<td>Lucyila Prado and Martha Leen</td>
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<td>9:45 a.m.</td>
<td>Case Management Presentations; National Breacs Start, SMP Case Review</td>
<td>Kristen Westaway, Scott Simunoba, and Judy Farah</td>
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| 10:30 a.m. | SMP Program Updates, Review, and Discussion of Program Activities:  
- EMMU Updates  
- Media, Outreach and Education, Long Term Care Survey, Regional Advisory Councils, latest scams  
- Updated MA SMP Power-Pont Presentation with LGBTQ and DVA Breacs scare slides  
- Review of SMP Materials: Mailings and Travel Expenses  
- Quality Improvement Organization Changes  | Martha Leen, Lucilla Prado, and all SMP Team Members |
| 11:00 a.m. | SMP Information and Reporting System (SIRS) Review and Reminders       | Caroline Cole                       |
| 12:00 a.m. | SharePoint Software Training                                        | Bob Brunske                         |
| 12:00 p.m. | Lunch and Volunteer Appreciation Lunch Break                       |                                    |
| 1:00 p.m.  | Report on SMP Volunteer Recognition Initiative                       | Pat Marlin                          |
| 1:15 p.m.  | Planning for MA SMP 20th Anniversary Statewide Conference—Thurs., Sept. 26, 2019, Peabody Marriott | Lucilla Prado                      |
| 1:45 p.m.  | Closing Comments and Retreat Evaluation                              | All                                |

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Massachusetts SMP Volunteer Retreats

• Agendas feature timely topics to engage our volunteers.
• Retreats are planned with volunteer input.
• Speakers include our own volunteers sharing their work and experiences managing cases and doing presentations in the community.
• Outside speakers have included presentations by Livanta, Mass Health and SHINE.
Volunteers are invited to showcase their knowledge of the Senior Medicare Patrol Program at statewide conferences.
Volunteers help us translate SMP materials into other languages.
We get happy, engaged volunteers who stay with us for years!
Questions?

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