



# 2019 SMP/SHIP NATIONAL CONFERENCE

## **Training, Retraining and Retaining Your Valued Volunteers**

Becky Hayward, OSHIIP  
Caroline Louise Cole, MA SMP

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

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# In the Beginning ....

- Offered an initial training for new volunteers that lasted days.
  - Four days
  - Five days
  - 22- hours
  - CEU's
  - Printed training guide

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# 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

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# 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

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# 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

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# Today

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

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# 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

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# 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

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# Challenges

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

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# Successes

- Fewer terminations
- Better reporting
- Can train anyone at any time
- Focus more on retention

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# 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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# Massachusetts SMP



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

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# Massachusetts SMP Volunteer Retention Program



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# 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.

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# Massachusetts SMP



We believe that involving volunteers at the planning level shows them how valuable they are in the success of our program.

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# 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.

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# Massachusetts SMP Volunteer Retreat Agenda

**Massachusetts Senior Medicare Patrol Program  
SMP Team Member Retreat  
Monday, May 20, 2019  
9:00 a.m. to 3:00 p.m.  
Harvard-Pilgrim Office Building  
Conference Room 1038  
93 Worcester St., (Route 9)  
Wellesley, MA 02481**

Time	Topic	Facilitator
9:00 a.m. to 9:30 a.m.	Check in and Continental Breakfast	
9:30 a.m. to 9:45 a.m.	Welcome and Introductions Goals and Objectives for the day	Lucilia Prates and Martha Leen
9:45 a.m. to 10:30 a.m.	Case Management Presentation: Report on National Braces Scam, SMP Case Review, the "nuts and bolts" and other case updates	Kristen Westaway, Scott Simundza and Judy Farah
10:30 a.m. to 11:45 a.m.	SMP Program Updates, Review and Discussion of Program Activities: <ul style="list-style-type: none"> <li>• ESMV Updates</li> <li>• Media, Outreach and Education, Long Term Care Survey, Regional Advisory Councils, latest scams</li> <li>• Updated MA SMP PowerPoint Presentation with LBGTQ and DME braces scam slides</li> <li>• Review of SMP Materials; Mailing and Travel expenses</li> <li>• Quality Improvement Organization changes</li> </ul>	Martha Leen, Lucilia Prates, and all SMP Team Members
11:45 a.m. to 12:00 p.m.	SMP Information and Reporting System (SIRS) Review and Reminder	Caroline Cole
12:00 p.m. to 12:30 p.m.	Sharepoint Software Training This collaboration software replaces J: drive access	Deb Crooke
12:30 p.m. to 2:00 p.m.	Volunteer Appreciation Luncheon	
2:00 p.m. to 2:15 p.m.	Report on SMP Volunteer Recognition Initiative	Pat McMillen
2:15 p.m. to 2:45 p.m.	Planning for MA SMP 20 <sup>th</sup> Anniversary Statewide Conference— Thurs., Sept. 26, 2019, Peabody Marriott	Lucilia Prates
2:45 p.m. to 3:00 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.

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# Massachusetts SMP Statewide Conferences

Volunteers are invited to showcase their knowledge of the Senior Medicare Patrol Program at statewide conferences.



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# Massachusetts SMP

Volunteers help us translate SMP materials into other languages

**SCAM ALERT** **BRACE YOURSELF**  
DON'T GET TIED UP IN THE BRACE SCAM!

**Protect Yourself Against Deceptive Marketing:**

- Do not provide your Medicare Unique ID or Social Security number to anyone, except your trusted medical providers.
- Medicare and Social Security will NOT call you and ask for personal information.
- Hang up if anyone calls offering you free products or claiming to be from Medicare to obtain personal information. Beware!
- Do not reply to any postcards you receive in the mail offering free braces, creams, pain medication, or other products.
- Do not respond to deceptive TV Ads.
- Do not accept or open any packages you did not order.
- Contact the MA SMP Program if you receive surprise packages in the mail.

**REMEMBER NOTHING IS FREE!**  
Contact the Massachusetts Senior Medicare Patrol (SMP) Program to report such scams, deceptive calls, receipt of items you did not order and any other suspicious activities.

**We are here to help you!**  
Call 800-892-0890 or visit [www.MASMP.org](http://www.MASMP.org)

**ALERTA DE ESTAFAS** **PREPÁRESE**  
¡NO PERMITA SER ATADO EN LAS ESTAFAS!

**Protéjase contra mercadeos engañosos:**

- No proporcione su identificación única de Medicare o número de seguro social a nadie, excepto a sus proveedores médicos de confianza.
- Medicare y el seguro social NO llaman ni piden información personal.
- Cuelgue si alguien llama ofreciéndole productos gratuitos o se aferra a ser de Medicare para obtener información personal. ¡Cuidado!
- No responda a ninguna de las postales que reciba en el correo que ofrezca equipos gratuitos, medicamentos para el dolor u otros productos.
- No responda a anuncios de TV engañosos.
- No acepte ni abra ningún paquete que usted no haya ordenado.
- Comuníquese con el programa MA SMP si recibe paquetes en sorpresa por correo.

**RECUERDE QUE NADA ES GRATIS**  
Comuníquese con el programa Massachusetts Senior Medicare Patrol (SMP) para reportar tales estafas, llamadas engañosas, el recibo de artículos que no ha pedido y cualquier otras actividades sospechosas.

**¡Estamos aquí para ayudarle!**  
Lláme al 800-892-0890 o visite [www.MASMP.org](http://www.MASMP.org)

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# Massachusetts SMP

**We get happy, engaged volunteers who stay with us for years!**



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# Questions?



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