Recruiting and Retaining Volunteers Remotely Webinar

April 6, 2022

Welcome!

SMP	SHIP	MIPPA
• Senior Medicare Patrol	• State Health Insurance Assistance Program	• Medicare Improvements for Patients and Providers Act

Today's speakers
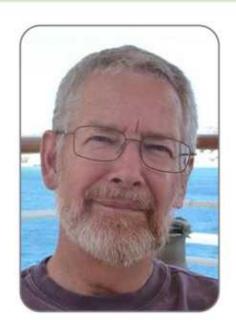
**Steve McCurley,
SMP and SHIP Centers
Consultant**

**Candace Nakamoto,
Hawaii SHIP Volunteer
Coordinator and
MIPPA Director**

**Becky Hayward,
Ohio SHIP (OSHIIP)
Volunteer
Ombudsman**

Agenda

Interview: Recruiting and Retaining Volunteers Remotely

Questions

Program Background

Hawaii

- **Size**
  - ✓ 2 FT staff; 1 temporary
  - ✓ 91 volunteers, including in-kind from AAA/ADRC
- **Structure**
  - ✓ State Dept of Health, Executive Office on Aging
  - ✓ Volunteer coordinator is primary manager of volunteers

Ohio

- **Size**
  - ✓ 20 FT staff
  - ✓ 500 volunteers; less than 100 are true volunteers
- **Structure**
  - ✓ Division of OH Dept of Insurance
  - ✓ Ohio statewide hotline (10 staff)
  - ✓ Volunteer ombudsman; 5 Community Liaisons assigned geographically

Program Background

Hawaii

- **Layout**
  - Main office is in Honolulu; 100% of volunteers work remotely
  - Offices of AAA/ADRC utilized to provide local office for volunteers on neighbor islands
- **Challenges**
  - Islands with varying populations and resources; both Molokai and Lanai are very rural and it's difficult to recruit volunteers
  - Costly for staff to fly to other islands to meet or train volunteers
  - Rural communities have limited access to resources/broadband

Ohio

- **Layout**
  - Home office is in Columbus; all paid staff presently work from home
  - Community liaisons travel to do outreach and events
- **Challenges**
  - Counties in state are both very urban and very rural – lot of variety
  - Lot of different professionals; hard to talk to as a group
  - Getting volunteers to report is difficult

1. Interview Questions: Recruiting

How do you recruit new volunteers?

- Which methods do you use?
- Of these, which works best for you?
- Are there any methods you've tried that didn't work well?

What is the primary motivational message that you emphasize?

Describe your intake system from initial contact through final acceptance. How long does this usually take?

Intake System: Hawaii

Volunteer inquiry received from SHIP helpline or SHIP website (directed to VC)

→ Follow up via email/phone and ask initial screening questions.

→ Screen for potential conflict of interest. Outline volunteer responsibilities and training requirements.

Volunteer understands scope of work and responsibilities. Send formal volunteer application and background check with instructions (email/PW encrypted or hard copy).
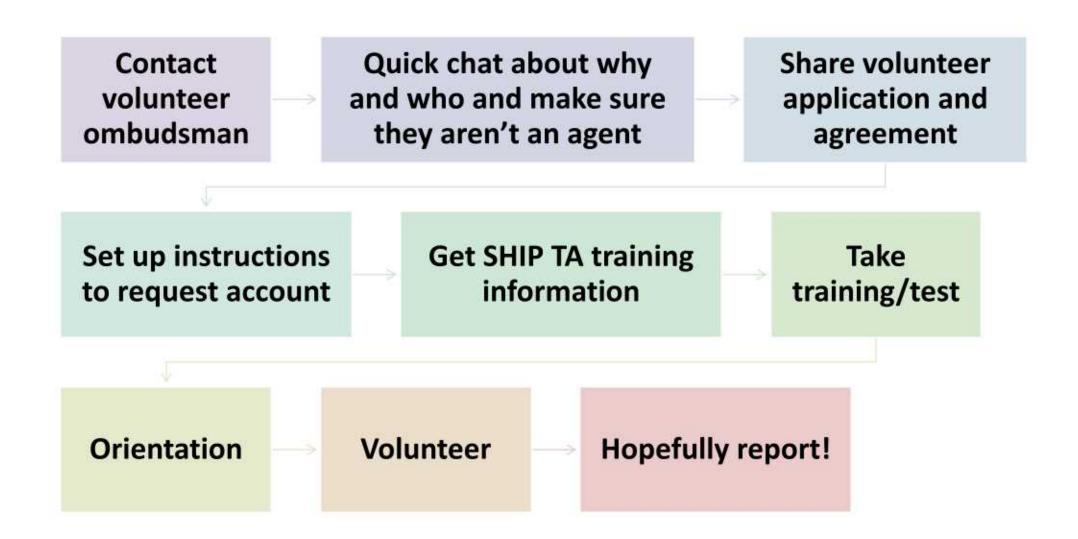
→ Application/background check received. VC conducts background check and assigns reference checks to trained volunteers.

→ Background check clear and reference checks completed. VC schedules Zoom program orientation and Medicare 101 training (1 hour 30 min.)

Program orientation & Medicare 101

→ Email forms, set up access to SHIP OCCT, event list, add to email listserv, Medicare training, role-specific training, shadowing

→ Volunteer is now able to actively volunteer.

9

Intake System: Ohio

Contact volunteer ombudsman	Quick chat about why and who and make sure they aren't an agent	Share volunteer application and agreement
Set up instructions to request account	Get SHIP TA training information	Take training/test
Orientation	Volunteer	Hopefully report!

3. Interview Questions: Communications

How often and how do you communicate with each volunteer?

What's the primary thing you try to accomplish with the communications?

Do you find that the same communication methods work for all of your volunteers, or do you have to use different techniques based on the individual?

4. Interview Questions: Retention

What are your turnover statistics?

Have you ever tried to track *when* you tend to lose volunteers and, if so, what did you learn by doing that?
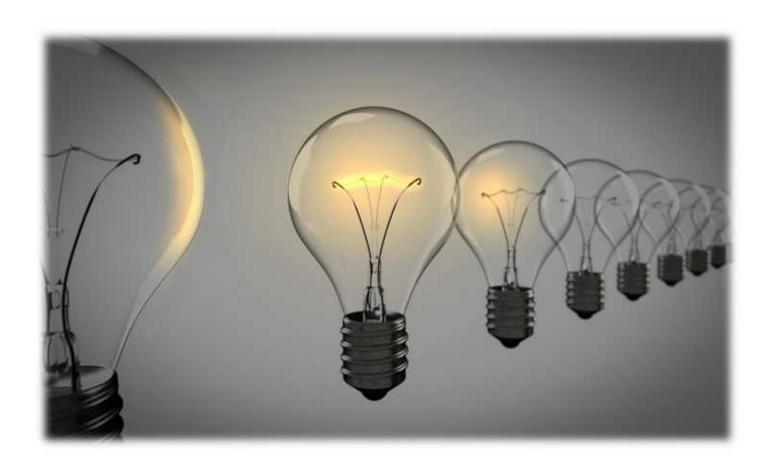
Volunteer Turnover Statistics

Hawaii

- **2022**
  - 92 (volunteers & in-kind staff AAA)
- **2021**
  - 90 (volunteers & in-kind staff AAA)
  - Onboarded 5, lost 3; Net gain=2
- **2020**
  - 88 (volunteers & in-kind staff AAA)
  - Onboarded 6, lost 4; Net gain=2

Ohio

- **2022**
  - 482 active volunteers
  - 95 true volunteers
  - The rest are in-kind
- **2019**
  - 625 volunteers
  - 147 true volunteers

5. Interview Questions: Final Thoughts

Do you have any additional tips or suggestions about recruiting and retention?

Today's webinar resources in the libraries

SMPs	SHIPs
• Step 1: Login at [🔒 SMP Login] www.smpresource.org (click the blue SMP Login padlock). • Step 2: Search for keywords "remote".	• Step 1: Login at [🔒 SHIP Login] www.shiptacenter.org (click the orange SHIP Login padlock). • Step 2: Go to the Resource Library. • Step 3: Search for keywords "remote".

MIPPA grantees: Resources are emailed to the MIPPA listserv.

Additional resources in the libraries

Recruitment, Retention, and Recognition Resources

- Recruitment Planning Worksheet (Template)
- Recognition Tips

Recent webinars

- 3/22: How to Manage a Volunteer Program
- 3/24: Self-Care Strategies to Sustain You in Your Work

Search the SMP and/or SHIP libraries for keywords such as:

- Recruit
- Remote
- Online
- Technology

16

Questions and discussion