

Building the Volunteer Management Capacity of Your Local Partners

June 21, 2017



Welcome!

SHIPs

- State Health Insurance Assistance Program

SMPs

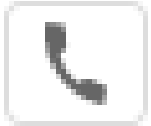
- Senior Medicare Patrol

MIPPAs

- Medicare Improvements for Patients and Providers Act

ACL = Administration for Community Living

Today's training will be interactive!



Let's practice using the buttons in the Participants panel on the right!

	Yes
	No
	Too Fast
	Too Slow
	Applause
	Laughter

VRPM = Volunteer Risk and Program Management

Today's speaker



Steve McCurley
Consultant,
SMP Resource Center and
SHIP Technical Assistance Center

Agenda

**VRPM rules
regarding VHOs**

**Assessing the
capacity of your
VHOs**

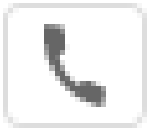
**Building the
capacity of
your VHOs**

**Resources &
Questions**

VHO = Volunteer Host Organization

Quick check-in questions

How many of you have partners who manage program volunteers?



Yes



No

Quick check-in questions

What percentage of your volunteers are managed by these VHOs? Pick the nearest approximate percentage.

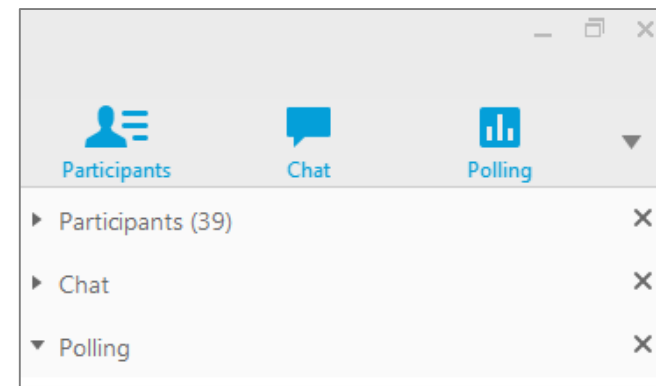
- 5
- 25
- 50
- 75
- 100

What do the VHOs do in working with these volunteers? Check all that apply.

- Recruit
- Interview
- Screen
- Train
- Supervise
- Other

When the polling has ended, click the arrows or icons to re-open your other panels as needed.

VHO = Volunteer Host Organization



Some opening notions

- “You’re only as good as your VHOs.”
- And from a legal standpoint “they are us.”



1.2 Scope of the volunteer policies

Policy: Unless specifically stated, these volunteer policies apply to all volunteers in all programs and projects undertaken by or on behalf of the SMP/SHIP, including volunteer involvement that is organized and managed in SMP/SHIP volunteer host organizations (VHOs). The pivotal variable in the application of these volunteer policies is volunteers' performance of SMP/SHIP work. Where volunteers are clearly performing what could reasonably be called "SMP/SHIP work" under the direction and control of the SMP/SHIP, those volunteers and their coordination are subject to the provisions of these volunteer policies.

Assessing the capacity of your VHOs: overall

1. How many partners do we have? How many manage volunteers?
2. What is our system for working with partners? Program function? Geography?
3. What is our process for engaging with these partners? Do we have contracts with them? MOUs?
4. What requirements for working with volunteers do we currently have with them? Are these in written form? How specific are they?

Key elements to include in the VHO agreement

1. Clear understanding that the VHO agrees to meet the requirements of the VRPM policies.
2. Listing of the actions that the VHO agrees to undertake in managing SMP/SHIP volunteers.
3. Process for tracking VHO progress in implementing the VRPM policies.
4. Assistance the SMP/SHIP will provide to the VHO in implementing the policies.

Assessing the capacity of your VHOs: individually

1. Performance history: how long have they been involved? How well have they done?
2. Status of volunteer program: size, structure, budget.
3. Staffing: who, position in agency, how long involved, experience with volunteers, other duties, percentage of time allocated to SMP/SHIP work.
4. Nature of SMP/SHIP volunteer roles: simple vs. positions of trust.
5. Experience with SMP/SHIP clientele.
6. Do they operate other volunteer programs: SMP, SHIP, LTCO, AARP, RSVP, VITA, etc. What are the rules for these programs? Do SMP/SHIP volunteers also volunteer for other programs?

Building capacity: planning

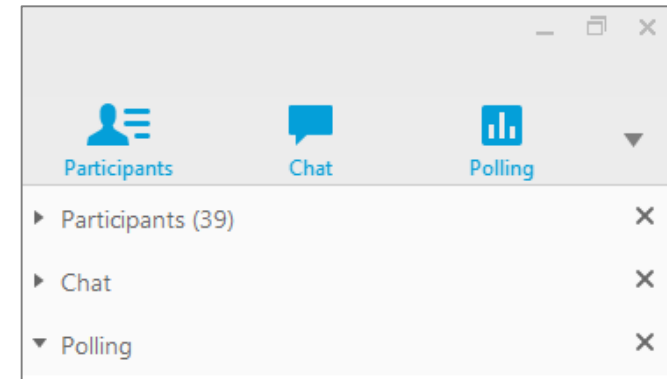


- Division of responsibility: who does interviewing, screening, supervision, recognition, dealing with problem behavior?
- Communication: how do we communicate, how often do we talk, what do we do in case of an emergency?
- Degree of authority: who can do what? What *can't* the VHO do in regard to volunteers?

Poll: Who can terminate a volunteer?

- The VHO, acting mostly on its own.
- Only the SMP/SHIP
- I'm not sure.

When the polling has ended, click the arrows or icons to re-open your other panels as needed.



Building capacity: staffing

- Role description
- Help in disseminating recruitment solicitation
- Assistance in interviewing



Building capacity: training

- Orientation of new coordinator of volunteers
- Volunteer Program Management Manual
- One-on-one coaching
- Group workshop/conference



- SMP/SHIP webinars
- Linkage to local volunteer manager associations:
<https://www.energizeinc.com/directory>

Building capacity: backup

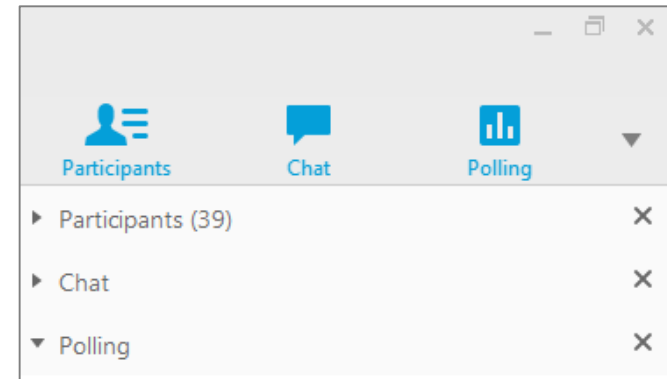
- Helpline: “My phone is always open...”
- Assistance with problem volunteer behavior or problem beneficiaries.
- Clear list of items about which you must be informed/consulted: firing a volunteer, privacy breach, injuries to volunteers or beneficiaries
- Help with internal politics: support and recognition
- Screening



Poll: who does background checks?

- SMP/SHIP program
- VHO
- Varies

When the polling has ended, click the arrows or icons to re-open your other panels as needed.



Final thought 1: allocating your time

- Top **10%**: They don't need you. Monitor, recognize, and involve them in helping others. Steal their best ideas.
- Bottom **20%**: You can't heal them. Work to upgrade the staffing and program capacity. Pray for turnover.
- Middle **70%**: These will benefit the most from your time and help, especially when new people come in.

Final thought 2: what if they resist?

- You may discover that some VHOs are unwilling or unable to make the changes necessary to come into compliance with the VRPM policies. It is likely that these will be organizations with relatively weak (or nonexistent) volunteer program management systems.
- It is possible that the SMP/SHIP network is both safer and more effective without the involvement of partners who are not willing to make a commitment to working effectively with volunteers.

The point of all this

- The SMP/SHIP system for involving volunteers is bigger than you may commonly realize. A big, not-so-obvious part of it is what happens in the VHOs during supervision of volunteers.
- Part of your responsibility is ensuring that the VHO is able to do a good job during that critical day-to-day activity. What happens during this interaction will have the greatest impact on the experience of volunteers. It's what they see and it's what enables them to do their work in a productively and satisfying way.



Webinar resources:

Today's recording and PowerPoint presentation

SHIPs

- Step 1: Login at www.shiptacenter.org/login.
- Step 2: Go to the Resource Library and view the "Recent" list or conduct a search.
 - *Tip: Search for keyword "capacity."*

SMPs

- Step 1: Login to the SMP Resource Library at www.smpresource.org/resourcelibrary.
- Step 2: View the "Recent" list or conduct a search
- *Tip: Search for keyword "capacity" or keywords "VRPM webinar."*

Tip: Click the link to webinar resources provided in your emails from WebEx.

VRPM Policy Implementation Kit “Grouping” in the SMP and SHIP Resource Libraries

Assessment of VHO Capacity (Template)

VHO Meeting Agendas (Templates)

SHIP VRPM Policy Implementation Manual

VRPM Implementation PPTs

Developing a Survey of SMP/SHIP Volunteer Involvement

And more!

Tip: Also see the *SMP/SHIP Volunteer Program Management Manual*.

SHIPs: find resources in the library

Step 1: Log in at www.shiptacenter.org

Step 2: Search the SHIP Resource Library by **keyword** or **category**.

Keyword Search Tips:

- To find all VRPM resource groupings, use keywords “VRPM Resource” and check the Exact Match box.

Category Search Tips:

- From the “Activity” category, select “Volunteer management.”
- Add “Source” category and select “CENTER” to find all of our related resources.

The screenshot displays the SHIP National Technical Assistance Center website. At the top left is the SHIP logo with the tagline "Local Help for People with Medicare." To the right is a search bar and a "Logged in:" indicator. A blue navigation bar contains several menu items: "Features", "SHIP Profiles", "Counselor Training", "Medicare and Other Insurance", "Center Services", "SHIP Operations", and "Resource Library". The "Resource Library" item is circled in red. Below the navigation bar, the page says "Welcome to the SHIP Resource Library!" and "Search here for resources created by SHIPs or for SHIPs." The search interface includes a "Keyword Search" input field containing "VRPM Resource", a checked "Exact Match" checkbox, a green "Search" button, and a green "Upload Resource" button. Below the search field are five dropdown menus for filtering: "Subject", "Activity", "Type", "Audience", and "Source", all currently set to "None selected".

SMPs: find resources in the library

- Step 1: Login to the SMP Resource Library at www.smpresource.org.
- Step 2: Search by **keyword** or use the **advanced search**.
 - *To find all archived VRPM webinars, search using keywords “VRPM webinar.”*
 - *To find all VRPM resource groupings, search using keywords “VRPM resource.”*
 - *Use the advanced search to find VRPM topics.*

The screenshot shows the 'Resources' search page. At the top, the word 'Resources' is written in green. Below it is a search bar containing the text 'vrpm resource'. To the right of the search bar is a link for 'Advanced Search'. Below the search bar is a 'Status' dropdown menu currently set to '-- All Status --'. At the bottom of the search area are three buttons: a blue 'Filter' button, a grey 'Clear Filter' button, and a checkbox labeled 'Show Only My Resources' which is currently unchecked.

Topic: *Scroll and check all that apply

- Volunteer Risk and Program Management (VRPM) (* Associate-level users cannot see)
- Information Technology (IT)
- Performance Management
- Recognition/Retention
- Recruitment
- Role/Position Design
- Safety
- Screening
- Training and Orientation

Q & A session

Thank you for participating in today's webinar!

This presentation is available for download from WebEx during the Q&A session.

If you have questions later,
SMPs, email: vrpm@smpresource.org
SHIPs, email: info@shiptacenter.org



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