



INTRODUCTORY GUIDE ON

Self-Directed VOLUNTEER TEAMS

for Senior Medicare Patrols (SMP) and
State Health Insurance Assistance Programs (SHIP)



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Introduction



The Aging Network Volunteer Resource Center, funded by ACL and administered by the National Association of Area Agencies on Aging (n4a), conducted in-depth, national research to identify what's working on the ground in communities that are using volunteers effectively. The findings form the basis of a volunteer development model designed to significantly increase the number of volunteers serving in the Aging Network. This innovative model seeks to align an agency's most important priorities with the interests and experience of today's retirees—a force estimated to be 6,000-strong on any given day.

This new model features a cutting-edge approach to expanding volunteer engagement opportunities and making optimal use of volunteer skills through the creation of self-directed volunteer teams. The model is based on three core principles: teams, self-direction and shared leadership. This approach provides the Senior Medicare Patrol (SMP) and the State Health Insurance Assistance Program (SHIP) with the tools and resources to significantly expand volunteer participation beyond current levels. By building on the existing foundation of success in attracting volunteers, the self-directed volunteer team model takes volunteer program efforts to a new level of engagement and effectiveness. The ability to expand services, strengthen infrastructure and improve training delivery are just a few examples of the potential that can be achieved.

This model can help to support the SHIPs and SMP programs' continuing need to adjust and grow in an ever-changing environment. We not only hope that you will find the information and insights in this guide to be interesting, but more importantly, to take what you've learned and apply these principles in your own community.

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The Importance of SDVTs for SMPs and SHIPs

A self-directed volunteer team (SDVT) is a multi-skilled group of volunteers who share responsibilities for addressing a community problem or need. In partnership with a community organization, each team is empowered to take full responsibility for designing solutions and executing actions resulting in tangible results and outcomes. SDVTs are an invaluable resource for SMPs and SHIPs because they:

1. Appeal to the Interests of Volunteers

Volunteer programs work most efficiently when they meet the needs and desires of potential volunteers. While this seems simple in concept, it is interesting to note that in recent years surveys have indicated there is a disconnect between what volunteers want and the types of volunteer opportunities most organizations are offering.

A survey by Volunteer Match in 2007 found the following preferences among seniors:

- More than half of age 55+ non-volunteers report some interest in volunteering. Professionals and women aged 55-64 are the most likely to be interested.
- 32 percent of non-volunteers age 55+ would prefer a volunteer activity that helps them learn new skills or explore new interests.
- Nearly two-thirds of males age 55+ indicate that they would prefer a volunteer opportunity that makes use of their personal or professional skills.

In 2013, the Bureau of Labor Statistics, in its annual survey of volunteer involvement, found that “providing professional or management assistance, including serving on a board or committee” is the second most popular form of volunteering for Americans over age 55, after “collecting, preparing, distributing or serving food.”

While many volunteers are happy with their existing volunteer roles and situations, an increasing number are looking for opportunities that are designed to offer something quite different. Their preferred volunteer experience would include a role that:

- Offers the significant level of responsibility indicative of their experience and professional background,
- Offers the opportunity to work collegially with other skilled and experienced volunteers on a common task, and

- Offers work that has clearly defined objectives and outcomes, with a finite time commitment.

Despite these clear preferences most organizations have not adapted their volunteer involvement systems to take advantage of the opportunity they present. The challenge of volunteer involvement in the near future will require organizations wishing to maximize the contribution of their volunteers to shift from traditional volunteer management practices to cutting-edge methods, as shown below.

Traditional Volunteer Management Practices	➔	Cutting-Edge Volunteer Management Practices
Traditional thinking	➔	New research-based thinking
Managing volunteers	➔	Leading volunteers
Individual placements	➔	Team placements
“Command and control” supervision	➔	Shared Leadership that empowers Self-direction and management
Task-based roles	➔	Issue and outcome-based impacts

2. Stretch Limited Resources by Maximizing Volunteer Programs

As demand for services for older adults and their caregivers has risen, federal, state and local budgets either have been cut or have not kept pace with the rising demand, leaving increasing numbers of older adults without information about available services, financial assistance and the support they need to maintain independent living at home and in the community.

The past few years of budget cuts and funding erosion at the federal level have had a direct effect on the provision of local services. Wait lists are long and growing and millions of hours of services have been lost, including help with in-home supports like bathing and dressing, home-delivered meals, transportation, senior job programs and many more community supports that help older adults age with dignity and independence at home and in the community.

To support older adults who need help the most, aging and disability services organizations are searching for affordable ways to sustain and expand their existing service capacity. The Senior Medicare Patrols (SMPs) and State Health Insurance Assistance Programs (SHIPs) are no strangers to these resource challenges. SHIPs and SMPs

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increasingly face challenges in expanding their services to meet the needs of even a fraction of 40.3 million Medicare beneficiaries, both in terms of expanding program services to all geographic areas within their state and to a wider array of populations, including underserved racial, ethnic or cultural communities.

While traditional or current patterns of volunteer involvement help extend a program's ability to provide services, they do come with a cost in organizational resources and time. To be effective and compliant with regulations, volunteers in core SMP and SHIP roles require management, supervision and monitoring—all of which place added burden on staff.

Expanding the current volunteer program through recruitment of new populations is also labor intensive, especially when outreach to new, underserved communities/populations is attempted.

3. Strengthen the Capacity of Existing SHIP/SMP Programs

The task before us is finding an approach that is efficient and effective in meeting the challenges faced by aging services organizations generally and SMPs and SHIPs specifically. The approach must supplement program operations resulting in an increase in services and expanded infrastructure. Ultimately the volunteer engagement approach must relate to the following three critical issues:

1 Align the interests of retirees (6,000 more a day)



with the challenges facing SHIPs and SMPs.

2 Reduce the volunteer management burden on staff, and



3 Produce quantifiable, measurable impact through cost-effective and efficient means.



The Self-Directed Volunteer Team Approach

A self-directed volunteer team (SDVT) is an intentionally formed, multi-skilled group of volunteers who focus on a particular issue or human need; they share responsibilities for addressing a challenge or opportunity (such as outreach). Over time, as the group transitions into a team, gains experience and works inter-dependently with the SMP or SHIP program through established ground rules, the program increasingly empowers the team to assume responsibility for its own functioning and for achieving results.

Through pilot and demonstration initiatives, the self-directed team approach to volunteer involvement shows great promise in realizing the desired alignment and will better enable SMPs and SHIPs to:

- Meet organizational goals, particularly in the areas of outreach, resource development and program expansion;
- Strengthen and expand program infrastructure;
- Change and eliminate aspects of certain volunteer management and administration functions and reduce some of the burden of supervisory staff; and
- Aid in volunteer recruitment and retention.

Characteristics of a Self-Directed Volunteer Team

- **Group decision-making:** Decisions are made by team members.
- **Joint problem-solving:** All team members identify challenges and participate in addressing them.
- **Manageable group:** Ideally, comprised of no more than 8 core team members.
- **Appropriate interaction:** Conducts regularly scheduled meetings.
- **Long-term perspective:** Achieves goals over time, but can still be time limited.
- **Authority to act:** Acts with autonomy within agreed upon parameters and mission.
- **Complementary skills:** Incorporates diverse mix of actual or potential skills.
- **Shared leadership:** Recognizes and respects that every voice is essential.
- **Decision-making:** Works to achieve consensus with agreement that members will support the decision even though not their preference.
- **Mutual accountability:** Team members support and hold each other accountable, while adhering to the agreed-upon ground rules established with staff.

Key Components of an SDVT Model

Although key components of the SDVT model have been identified through pilot and demonstration programs, each SMP and SHIP needs to determine, based on level of interest, all challenges, existing infrastructure and the best way for this model to fit and advance the individual program's operation.

Following are the key components inherent in adopting the SDVT model.

A. Issue Brief

The completed Issue Brief template outlines the why, what and how of addressing a particular issue or need. The Issue Brief helps the SMP or SHIP and the SDVT gain clarity and transparency in the work to be done and in monitoring progress; it is a living document that evolves as the SDVT and the project progress.

B. Charter

The Charter is a written agreement between the team and the SHIP/SMP that establishes an interdependent

relationship through mutually defined understanding, expectations, roles and guidelines for interaction.

The Charter incorporates the team's goals and process for achieving them (defined in the Issue Brief) and defines:

- Aspects of the interdependent relationship and operation of team and staff (including the SMP/ SHIP as a whole), and
- The agreed-upon ground rules or parameters including desired timeframe for completion, available support system, treatment of expenses, needs for reporting and approvals, assessing progress and documentation of team contribution to the SMP or SHIP program and outcomes.

Like the completed Issue Brief, the Charter is a living document that evolves as the SDVT and the project progress.

C. Key Staff

Key staff are agency staff assigned to serve as the liaison between the organization and volunteer team. Designated key staff receive training in team planning, development, facilitation and strategies. Key staff are responsible for ensuring that the team has the training and internal support it needs to be successful.

Responsibilities:

- Identifies core team members, works with core team members to define desired team outcomes (Issue Brief) and the operating ground rules by which the team and SHIP or SMP interact (Charter).
- Participates in initial meetings, assists and supports team formation and start-up, serves as a liaison with the organization, and advocates for the team, its process and goals within the SMP/SHIP.
- The key staff requests a review and updating of the Issue Brief and Charter as necessary and appropriate.

D. Team Facilitators

Several initial team member(s) should be trained in team development, facilitation and team operations. Team facilitators work with the key staff to plan and coordinate start up activities, develop the Issue Brief and Charter, monitor progress toward defined outcomes, follow established ground rules and rotate roles among team members. Team facilitators are critical in ensuring shared leadership. A Team facilitator must resist the temptation to tell others what to do, fill "dead air," end discussion

Characteristics of a Self-Directed Volunteer Team

prematurely, take sides, tune people out, go ahead and make the decision him/herself, or avoid conflict.

Responsibilities:

- Keeps focus, organizes, involves key staff per the Charter agreements.
- Facilitates, supports and assists in tracking progress towards goals.
- Models and facilitates team work, active listening and shared leadership.
- Responsible for reviewing and updating the Issue Brief and Charter whenever confusion or conflict arises.

E. Volunteers

Recruited and selected volunteers are interested or passionate about the issue, defined outcomes, potential impact on beneficiaries, and are committed to learning and functioning in a team structure.

Responsibilities:

- Active participation and listening.
- Rotate in and out of team roles.
- Recruit and help orient members.
- Communicate openly and honestly.
- Work toward consensus.
- Be a willing learner and teacher.
- Inform and abide by ground rules, Issue Brief and Charter.

SDVTs vs. Traditional Volunteers

Currently the traditional model of volunteerism is through highly defined and structured volunteer roles or tasks under the close supervision of paid staff. SDVTs operate in a more interdependent relationship with the SHIP/SMP—performing tasks that benefit the program, but doing so with less direct supervision from paid staff. Much of the leadership of an SDVT comes from within, with volunteers jointly making decisions about what will be done, who will do it, and how it will be accomplished. This leadership model is referred to as “shared leadership.”

By sharing and performing a variety of roles, volunteers learn and experience different roles within a team structure.

The shared leadership model insures that leadership is not concentrated in just one person, which is a primary difference between a group and a team. The model also includes leadership rotation, inclusiveness, and open and welcoming participation. Within a team operation differences are expected, respected and encouraged. Volunteers serving on a team are open to debate and resolving conflict, by working to build consensus which means that all team members accept the decision even though it may not be a team member’s first preference.

Dr. Bill Donahue, an expert on leadership and groups summarizes the idea of shared leadership best: “Shared leadership is more than an ideal. It is a commitment to becoming a real community of leaders with mutual accountability, vision, goals, trust, blame and rewards.”

SDVTs in SHIP and SMP Programs

Within the SMP/SHIP networks there are multiple opportunities for SDVTs including:

- Recruiting and managing volunteers who write a newsletter to communicate with other SHIP/SMP volunteers.
- Contacting local media and managing the placement of stories about the work of the SMP/SHIP.
- Scheduling and performing general public outreach and communication duties.
- Providing outreach to hard-to-reach Medicare and/or Medicaid beneficiaries.
- Conducting research to answer technical questions received by the SHIP/SMP.
- Planning and initiating growth to new geographic areas of the state.
- Exploring potential new revenue sources for the SMP/SHIP.

One of the most potentially productive areas for SDVTs lies in outreach to prospective volunteer populations. A SDVT from these populations would better understand what approach would work in establishing good relationships, act as gatekeepers to gain entry to the community and aid in vetting and translating materials for cultural appropriateness. The SDVT would have both contacts and knowledge that staff do not possess, as well as the time needed to establish and maintain relationships.

Characteristics of a Self-Directed Volunteer Team

Case Examples of SDVT Accomplishments

1. Pennsylvania Statewide Technical Assistance and Coaching Team

The APPRISE (SHIP) program of the Pennsylvania Department of Aging (DOA) recruited an SDVT to assist with efforts to develop strategic approaches to assist APPRISE volunteers in providing information on Medicare. Key staff of PA DOA recruited retired CEOs, experienced consultants and retired nonprofit executive-level leadership volunteers from outside the APPRISE network as a Coaching Team to assist SDVTs in five pilot sites to implement needed changes suggested by program audits and to train volunteers as APPRISE trainers.

2. Delaware's Consultants for Nonprofits

This self-managed team of volunteers age 60+ assist local nonprofits with short-term projects at no cost to the nonprofit.

How it works:

- The facilitator and the core team of 20 people meet bi-weekly to administer the program, decide what projects will be undertaken and assign small teams of 2 or 3 people to do the work.
- Teams assigned to each project give progress reports at the bi-weekly meetings. Project teams receive guidance and support from the entire team.
- Started by a staff member of a senior center, the program is now totally self-sufficient.

Completed projects:

- Assisted two nonprofits in getting their tax exempt status.
- Developed a policies and procedures manual for one nonprofit and a volunteer handbook for another.
- Developed a volunteer training program for a hospice.
- Conducted an assessment of the volunteer recruitment efforts of a SHIP.

3. City of Madison, Wisconsin Senior Center

The Madison Senior Center identified needs of the center for which there were no resources. The center proceeded to set up four self-directed volunteer teams based on an identified need. Each of the four teams produced a number of projects including:

- The public relations team determined a need for an internal welcoming committee, provided advice about the center's physical space and image, created a new PowerPoint presentation and DVD promotional piece, formed a speakers bureau and began a project to encourage older adults to complete their U.S. Census forms.
- The program development team interviewed multiple agencies regarding senior adult needs for programming and activities in the city and developed a report for the Senior Center Board and city officials.

4. The United Way of Westmoreland County, Pennsylvania

The United Way of Westmoreland County's Faith in Action program utilizes a self-directed volunteer team to provide companionship and assistance to citizens age 60+. Examples of the type of assistance the program provides include escorts to doctors' appointments, caregiver respite and minor home repair. The program is a partnership of the interfaith, nonprofit and business sectors and is sponsored by the United Way of Westmoreland County. The United Way of Westmoreland County felt they had an exceptional Faith in Action program with community buy-in and great anecdotal evidence. They have now taken the program to the next level by collecting solid evidence. Their self-directed volunteer team designed and carried out an evaluation lead by a PhD student volunteer. The volunteer-led evaluation provided the results and solid outcome data needed to validate their claims.

Conclusion

Volunteers are critical to SHIP/SMP. However, the mismatch between what volunteers want to do and what organizations are currently asking volunteers to do is a growing barrier to SHIP and SMP volunteer involvement. Research indicates that SDVTs are an effective way to shape volunteer engagement that is more appealing and more motivating for many volunteers. Research also shows that when the SDVT model is adopted with consistency, teams make significant, quantified and measurable contributions to the organization, in this case, the SHIP's or SMP's mission and goals. As such, SDVTs offer a highly desirable supplement to the existing SMP and SHIP volunteer systems.

Another major benefit of SDVTs is that they are self-generating and, therefore, sustainable. People with SDVT experience can recruit new volunteers, spin off additional teams and have the satisfaction of knowing that they have made an important and long-lasting contribution to the well-being of their communities.