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# Managing Volunteers

## ABOUT THIS BRIEF

This brief provides an overview of how to identify, select, train and retain volunteers. The next issue will focus on costs (both hard dollar and staff time) associated with volunteer programs, as well as profiles of Medicare education and advocacy programs that have successfully integrated volunteers into their efforts. Additional information and sample materials can be found on the Center for Medicare Education Web site ([www.MedicareEd.org](http://www.MedicareEd.org)).

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## Using Volunteers Can be a Win-Win Situation.

Volunteers can enhance your organization and its work. Think of them as unpaid staff. They need to be carefully selected, trained and supervised; given meaningful work; and appreciated for their contributions. If you put in the time and the effort, volunteers can become an integral part of your organization.

A study commissioned by AARP, *Maintaining America's Social Fabric: The AARP Survey of Civic Involvement*, found that more than 40 percent of Americans had spent some time in the past 12 months volunteering. Volunteers contribute an average of 4.2 hours of service per week, totaling 20.3 billion hours each year. These volunteer hours have an estimated value of \$201.5 billion annually.<sup>1</sup>

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According to Dr. Neena Chappell, Director of the Centre on Aging at the University of Victoria, Canada, people who volunteer, especially if it involves helping others, are happier and healthier in their later years. People who volunteer report that they get back more—in joy and satisfaction from contributing to a cause—than what they give in time and energy.<sup>2</sup>

Using volunteers can be a win-win situation. Volunteers can help your organization further its goals, while you help them make important contributions to their communities and their own well-being.

***"Knowing what motivates volunteers can help you match them to appropriate jobs and to understand what sort of support and encouragement they need to remain."***

## Why Do People Volunteer?

People volunteer for different reasons. Some are looking for ways to contribute to their communities or to a particular cause they feel strongly about. These people want to "make a difference." Others want to enhance existing skills, while others are looking for new experiences and ways to develop new skills and interests. For some people, volunteering is a way to remain active in retirement and to meet new people.

Others see volunteering as a stepping stone to paid employment. It is a way for them to test the waters, gain new skills and obtain references.

Knowing what motivates volunteers can help you match them to appropriate jobs and to understand what sort of support and encouragement they need to remain. No matter why people volunteer, everyone wants to feel respected and appreciated. This means doing meaningful work, having a comfortable workspace and feeling like a valued part of the organization.

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## Why Should We Use Volunteers?

Often, organizations first consider using volunteers when they find they have more work than they can handle. They view volunteers as a readily available, low-cost way to increase service output. While this can certainly be true, volunteers offer other benefits as well.

### *Volunteers provide “new blood.”*

- Volunteers bring fresh energy, insight, skills and experience, and they can help re-energize your organization.

### *Volunteers enhance your organization’s visibility and reputation.*

- Satisfied volunteers can be a great publicity tool. Employing volunteers raises the level of community involvement in your program and your organization’s profile in the community. Volunteers will talk about what they are doing and what your organization does for the community.
- Successful volunteer recruitment efforts can be the basis for future collaborations. Recruiting volunteers can help forge relationships with other organizations in your community. These organizations may be able to help you find volunteers, and they may then be interested in developing joint projects to help Medicare beneficiaries.
- Volunteers may have a history in the community. Many are involved with other organizations—as volunteers, clients, or current or former employees—so they can serve as liaisons between your organization and these other groups.
- Utilizing volunteers can enhance your organization’s image and reputation with funders. Some foundations may be interested in projects using community volunteers, so your use of volunteers may make a project more appealing to potential funding sources.

### *Volunteers are role models.*

- Volunteers can empower Medicare beneficiaries.

It shows them that “ordinary” people can make a difference. And if your volunteers are Medicare beneficiaries themselves, they show other beneficiaries that it is possible to advocate successfully for oneself and to “master” the Medicare maze.

- Satisfied volunteers beget new volunteers. If they are excited about what they’re doing, they can get other people excited about it, too. People think, “If she can do that, I can do it, too!”

## Types of Volunteer Work Performed Most Frequently, 1998

*Type of volunteer work by percentage of all volunteers*

23.6%	Direct services (e.g. serving food, doing repairs, providing transportation)
16.0%	Fundraising
12.2%	Don’t know/refused
10.5%	Giving advice, information or counseling
9.8%	Organizing an event
8.6%	Visiting people/companionship
7.4%	Administrative or clerical work
4.5%	Board member/trustee
4.0%	Advocacy
3.4%	Other

Source: The Independent Sector, *Giving and Volunteering in the United States, 1999*

## How Can Volunteers Help?

As the chart shows, volunteers can do much more than clerical and office work (although many people are happy doing this). Some volunteers are capable of and may want to do more substantive, interactive work. By utilizing volunteers to the fullest extent of their capabilities and involving them in meaningful activities, you can keep volunteers motivated (which may keep them with you longer!) and extend the reach of your organization.

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There is a range of opportunities for volunteers to work in Medicare projects. Some projects that have incorporated volunteers include:

- Medicare information hotlines
- Medicare fraud squads
- State Health Insurance Assistance Programs (SHIPs)
- Ombudsman projects
- Members of boards and committees
- Reviewing written materials
- Translating written materials

## Where Can We Find Volunteers?

If you are looking for older volunteers, try recruiting from places where they gather or receive other services. **Senior centers, libraries, congregate meal sites and employee retirement programs** at corporations and unions are good sources. Try contacting your local **AARP chapter** or **volunteer job bank**.

Finally, see if your local college or university offers an **Institute for Learning in Retirement (ILR)**. ILRs are member organizations affiliated with colleges and universities that offer short-term peer-organized and moderated classes (with no tests and no grades) for seniors. There are over 250 such institutes around the United States at this time. Some of them

even include service-learning components, which can give you access to potential volunteers who may be ready, willing, and able to assist your organization. Check out the Elderhostel Institute Network Web site (<http://eh.elderhostel.org/ein/>) for information about programs in your area.

Ask these groups to help you get the word out to their members and contacts. Provide copies of notices about your program and volunteer opportunities. These can be posted on **bulletin boards**, in **offices**, and handed out as **flyers**. Provide camera-ready text, or text on computer disk, so the information can be included in **newsletters**. All written materials should include a telephone number and the first and last name of the person at your organization to contact for more information.

Local and neighborhood **newspapers** are also a great way to get the word out about your organization and how volunteers can become involved. Advertise in local papers that seniors read. Or even better, get the paper to feature an article on your organization and its activities and to mention that you are looking for volunteers.

If you would like volunteers of other ages, see if **schools** in your area have a community service club or require community service as part of their curriculum. Local **youth leagues and clubs** may be good sources, especially for short-term projects, such as envelope stuffing. Some cities require community service as part of employment training programs or court sentence.

If you have current clients who have special skills or knowledge, ask them if they would like to volunteer. They may be happy to have the chance to give something back to your organization and to their peers.

**Word-of-mouth** is a great sales tool. Talk up your organization and its programs whenever you can. Let staff and current volunteers know you are looking for new volunteers, too. Ask them to mention it when they give talks, participate in community fairs and attend community meetings such as coalitions or committees.

## How Should We Conduct A Volunteer Interview?

First, develop a telephone interview form to help you screen out people who are clearly not appropriate for your needs. Have a short “script” ready to tell a person about your organization and volunteer opportu-

nities. Record the person’s name, phone number and availability. Also, find out how she heard about your organization. This will be useful in future publicity and outreach efforts. Ask her why she wants to volunteer and what she thinks she would like to do. You can learn a lot about someone’s motivations and interests during a short conversation.

### In a Volunteer Interview You Should:

- *Provide background and context.* Briefly explain your organization and what it does. Describe the range of projects available to volunteers.
- *Clarify the volunteer’s role.* Talk about the ways volunteers help your organization serve Medicare beneficiaries. Talk about expectations and responsibilities—yours and the volunteer’s. Do you require a minimum time commitment? Are there certain days of the week or times you need volunteers? Is there a trial period during which you and the volunteer can decide if the fit is right? How will your organization provide training, supervision and support?
- *Take the time to talk and listen.* Talk to the candidate. Ask her why she wants to volunteer. Does she have any special skills she might want to use, such as speaking a language other than English, knowing sign language or using computers. Are there any new skills she would like to learn? What would she like to do?
- *Leave time for questions and concerns.* Ask the volunteer what she hopes to get out of her volunteer experience. Does she have any concerns about training or time commitments? Does she think she would enjoy doing the job? What questions does she have that you have not addressed?
- *Make it a soft sell.* Don’t push for a commitment on the spot. If she seems unsure, it is OK to let the candidate take the written information home and think about whether this is the right thing for her. You can call her back in a few days to see if she has any questions and what she has decided.
- *Put it in writing.* It helps to give the candidate something she can refer to after she has left your office. This document should be in large, readable print (especially if you’re dealing with older volunteers) and no more than two or three pages in length. If it is too long, people won’t read it, or they won’t remember what they have read. It should include a brief review of the points discussed above. Don’t forget to include the name, title and phone number of the person to contact with any questions or concerns. It is best if it is the same person who interviewed the candidate. If the same person does not always do the interviewing, leave that part of the document blank, and fill it in before you give it to the candidate.
- *Be prepared.* Have information about other volunteer options available in case you or the candidate realize that the fit is not right. These opportunities can be in your organization, other organizations in your community or a volunteer bank.
- *Say thank you!* Thank the person, whether she will be volunteering for you or not.

If the person passes the phone screen, set up a face-to-face interview. If you know immediately that the person is not appropriate for your program, do not encourage a face-to-face interview. This will build false hopes and make it more difficult to tell the person that she will not be working with your organization. Be kind, but firm; accepting a volunteer whom you know will not work out will only cause problems for you down the road.

A face-to-face interview with a potential volunteer is a lot like an interview with a potential paid staff member. You want to get a feel for the candidate, explain the job and responsibilities, clarify time requirements and answer any questions the candidate may have. The more rigorous you are during the interview process, the less likely you are to encounter problems later on.

## What Kind of Training and Supervision Do Volunteers Need?

***“Training and supervision help volunteers get to know each other and paid staff and to learn to work better with one another.”***

Volunteers need training and orientation before they start their work. If you have a number of volunteers starting at the same time, you can have a group training/orientation. If not, be sure to

provide some one-to-one information and guidance. All volunteers also need supervision, including a person to speak to if they have questions or problems. Ongoing training is important as well. In addition to learning new skills and information, training and supervision help volunteers get to know each other and paid staff and to learn to work better with one another.

➤ **Initial training** may be a single session. If there is a lot for volunteers to learn (such as understanding Medigap plans in your state, or how to submit claims and appeals), training may take place over a number of sessions. In either case, initial training should include a number of components. First, provide an introduction to your organization and key staff members. Talk about how your organization’s work helps

Medicare beneficiaries and improves the Medicare system. Discuss how volunteers’ work contributes to your organization (“Why we couldn’t do it without you”) and how it helps Medicare beneficiaries. Review the specific information volunteers need to know to do their jobs, including whom to call if they are going to be absent or late. If necessary, provide training on special aspects of working with Medicare beneficiaries. This may include: understanding issues of confidentiality; working with people who have hearing or visual impairments or memory problems; working with family members; and dealing with stressful situations.

- **Ongoing training** reinforces existing skills and knowledge, teaches new skills and provides new information. Group training is a great way for volunteers to get to know one another better and to see they are part of a larger effort to help Medicare beneficiaries. Ongoing training also includes on-the-job training. This is a good way to give volunteers hands-on experience in tasks such as completing intake forms and other paperwork and operating the phone system.
- **Develop written materials** that review what you cover in the training. This helps volunteers reinforce what they’re learning and lets them check back if they forget something. Again, make these written materials easy-to-read (e.g. large print, lots of white space) and related to what volunteers need to know about your organization and their work.
- **Supervision** helps ensure that volunteers are doing their best. It is a way to identify and fix small problems before they become big ones. Most people appreciate feedback on their work and welcome the opportunity to learn new things. In addition, supervision helps volunteers feel more connected to the organization. It’s proof they are valued and that someone cares enough to make sure they are comfortable in and happy with their jobs.

## Resources on Volunteerism

### AARP

<http://www.aarp.org/volunteerguide/>  
1-800-424-3410

The AARP Web site offers a special section called "The Volunteer Experience" which contains Web resources, a volunteerism "bookshelf" and a listing of "100 Simple Ways to Make a Difference."

### THE ASSOCIATION FOR VOLUNTEER ADMINISTRATION

<http://www.avaintl.org/>  
1-804-346-2266

The Association for Volunteer Administration is an international professional membership association for individuals working in the field of volunteer management. Its Web site provides resources, listings of events, career information and a forum on professional issues related to managing and leading volunteers.

### ENERGIZE, INC.

<http://www.energizeinc.com/>  
1-215-438-8347

Energize is an international training, consulting and publishing firm specializing in volunteerism. Its Web site focuses on volunteer management and includes a link to *e-volunteerism*, an electronic journal for the volunteer community.

### THE INDEPENDENT SECTOR

<http://www.independentsector.org>  
1-202-467-6100

The Independent Sector is a coalition of nonprofits, foundations and corporations which seeks to "strengthen nonprofit initiatives, philanthropy, and citizen action." Its Web site provides a summary of its 1999 national survey on Giving and Volunteering in the United States, including "10 Tips on Volunteering Wisely."

### UNITED PARCEL SERVICE

<http://www.ups.com/news/Survey2.pdf>

In 1998, UPS sponsored research among volunteer organizations on volunteer management and obstacles to volunteering. The final report, *Managing Volunteers*, is available at this Web site. (It should be noted that UPS followed up on this study with grants to nonprofit organizations to put systems into place to use volunteers more effectively and retain volunteers.)

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<sup>1</sup> AARP. *Maintaining America's Social Fabric: The AARP Survey of Social Involvement*, 2000.

<sup>2</sup> Chappell, N. "Volunteering and Healthy Aging: What We Know," <http://www.volunteer.ca>, 1999.

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