

Learning by Doing:

Moving from a
Knowledge-based to a Task-based Volunteer Training Culture



Statewide Health Insurance Benefits Advisors

SHIBA HelpLine

A service of the Washington State
Office of the Insurance Commissioner

“Just when you think you’ve graduated
from the school of experience,
someone thinks up a new course.”

--Mary H. Waldrip,
armchair philosopher



The Good -- We are doing well



The Bad -- We are still growing



The Ugly -- Yikes!



SHIBA HelpLine Mission Statement

SHIBA HelpLine provides free, unbiased information about health care coverage and access to help improve the lives of all Washington state residents. We cultivate community commitment through partnership, service, and volunteering.

SHIBA HelpLine

Who We Are

A network of:

- Community volunteers (approx. 300)
- Local sponsoring agencies/sub grantees (21)
- Office of the Insurance Commissioner staff
 - 7 field and 8 Tumwater
- Other government & community partners





SHIBA HelpLine History

- Started by Skagit County volunteers in 1976
- The first program of its kind in the nation
- Inspired federal funding to create State Health Insurance Programs (SHIPs)
- The designated Senior Medicare Patrol Project (SMP) for WA since beginning



SHIBA HelpLine Volunteer Roles

- Public Speaking
- Outreach
- Counseling
- Administrative
- Data Entry
- Special Projects





SHIBA HelpLine Prior to Training

- Recruitment
- Screening
- Training Paths





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Volunteer Training

- Basic Training
 - 8-30 hours depending on volunteer role(s)
- Update Training
 - 10 times a year
 - 2-3 hours each
 - 80% Attendance Expected
- Adequate Training Time is Needed





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What is Task-based?

- Process vs. Content
- Training vs. Education
- Activity-based modules



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Why Task-based?

- Support Adult Learning Theory
- Manage Risk
- Ensure Consistent Service
- Avoid Information Overload



Note to self: Change can be hard!

SHIBA HelpLine Learning Foundation

- Clarify Program Scope
- Prevent Scope Creep
 - Manage growth





SHIBA HelpLine Learning Foundation

- Defining Discrete Volunteer Roles
- Volunteer Position Descriptions
- Task Analysis
- Training Paths



SHIBA HelpLine Task Analysis

- Detailed Blueprint
 - Observe work performed
 - Evaluate steps
 - Identify missing steps
 - List steps in detail
- Good for Competency Checks



SHIBA HelpLine SME Process

- Assigned Technical Content Areas
 - Divided by technical topic
- Determine “Nice to know” vs. “need to know”
- Ultimate Authority
- Research and Tracking
- Publication and Curriculum Review



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Key Curriculum Elements

- Pre-work
 - Reference manual, Quiz, Slide show
- Training Workbook
- Trainer Notes
- Visual Aids & Interactive Activity Tools
- Quick Reference Cards & Job Aids
- Key Publications



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Pre-Work

A note on Pre-work...

- Crucial to classroom performance
- Often contains bulk of technical content
- For higher-functioning volunteer roles (i.e. counseling), we expect some self-study will be needed





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More Key Elements...

- Adequate Class Time and Space
- Skilled Trainer/Facilitators
- The Right Participants at the Right Time





SHIBA HelpLine Training Evaluation

- Peer Review
- Pilot Modules
- Training Feedback Form
 - Both Trainers and Materials



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Volunteer Evaluation

- Trainer Observation
- Volunteer Checklist
- Mentoring
- Currently, no formal standard process





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The Future -- <3 Years

- Overview Modules
- Non-Counseling Training Paths
- Competency Checks
 - Knowledge & Skills
- Certification by Role
- Trainer Assessment



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The Future – 3-5 Years

- Blended Training Strategies
- Online Training & Refreshers
- Online Information Bank & Support
- New Staff Skills
- Change in Program Needs



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The Future – 5-10 Years

- Change in Demographics
- New Volunteer Needs
- Changing Face of Healthcare



SHIBA HelpLine Questions?

To see curriculum samples –

www.insurance.wa.gov/SHIBA/

- Click on Volunteer and Sponsor Resources
- “document” is the password



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