

## **Volunteer Recruitment Toolkit**

Want to recruit the right volunteers for your SHIP? HAP's volunteer recruitment toolkit has tips, tools, and strategies to help you succeed!

The toolkit includes planning materials and recruitment resources that you can modify and use for your unique program. This can help you save time and effort, and make the recruitment process a little easier!

### **Overview of Content**

- I. Tips for Recruiting Volunteers
- II. Strategies for Recruiting Volunteers
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- IV. Volunteer Recruitment Plan
- V. Volunteer Job Descriptions
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**HAP wants to help support your volunteer recruitment efforts!**

If you want to discuss volunteer recruitment ideas or challenges or want to connect with other SHIPs about this topic, we invite you to contact HAP's volunteer team at [shiphelp@hapnetwork.org](mailto:shiphelp@hapnetwork.org).

## Tips for Recruiting Volunteers

Think about the roles that you want volunteers to fill at your local SHIP. Which volunteer positions are most needed? Do any volunteers currently fill these positions? If so, talk with them about their perspectives on volunteering with SHIP. They may offer valuable insights that can help you recruit new volunteers.

Develop a recruitment plan. Identify businesses, organizations, faith communities, and individuals who are likely to be helpful in reaching or identifying prospective volunteers. Prioritize your contacts, set a schedule, and make sure to follow-up.

Invite others to help with volunteer recruitment. Ask your current volunteers, co-workers, or local partners to promote SHIP volunteer opportunities at community events and in counseling sessions. Think in terms of a "recruiting team." You don't have to do it alone!

Use a recruitment system:

- Carry several copies of your recruitment tool kit (and a pen) with you wherever you go.
- Have extra brochures and other promotional pieces ready for distribution.
- Give each volunteer candidate literature about SHIP to read at home.
- Be prepared to talk in-depth about the different volunteer positions, and have copies of the job descriptions available.
- Write down contact information in a recruitment log or notebook.
- Close the loop with prospective volunteers. Follow-up with a phone call within a week of meeting a prospect. Ask if they have any questions and offer to mail them the volunteer application form.
- Connect prospective volunteers with veteran volunteers who can talk enthusiastically about what they do and why they do it. Help prospective volunteers understand the rewards of getting involved with your SHIP.
- **Ask them to volunteer.** People are more likely to help when asked to do so.

Make it as easy as possible for prospective volunteers to apply for positions at your SHIP. Provide stamped, self-addressed envelopes to return completed applications, and be prepared to accept applications by fax or email.

It is a good exercise to put yourself in the shoes of a potential volunteer and walk through the application process. This way you can see any barriers that might prevent potential volunteer from following through and joining your program.

## **Strategies for Recruiting SHIP Volunteers**

There are several recruitment strategies you can use to enlist new SHIP volunteers. This tip sheet provides some ideas that might work well at your local SHIP.

- [Partnerships](#)
    - [Civic and Social Organizations](#)
    - [Faith-based Institutions](#)
    - [Volunteer Centers](#)
  - [Media Outreach](#)
  - [Everyday Recruitment](#)
  - [Other Recruitment Resources](#)
- 

### **Partnerships**

One of the best ways to recruit SHIP MATES is through partnerships with community organizations. Contact the organizations that you currently work with and tell them about SHIP MATES openings. Reach out to new partners and educate them about SHIP services and volunteer opportunities. These partners can help identify and recruit potential volunteers, and refer them to your local SHIP.

Which of these community partners could help you recruit new volunteers?

- 55+ communities
- AARP
- Alumni associations
- Businesses or unions
- Civic or social organizations (e.g. Lions club, Kiwanis)
- Coffee shops
- Colleges or universities
- Community clubs (e.g. book club, fitness club)
- Ethnic-based organizations
- Faith-based institutions
- Grocery stores
- Health care providers (e.g. home care agencies, hospitals)
- Libraries
- Neighborhood associations
- Professional associations
- RSVP
- Restaurants
- Retiree associations (e.g. retired teachers, retired federal employees)

- Senior centers or senior clubs
- Senior housing facilities
- Social Security Administration
- Social service agencies
- TRIAD
- Volunteer centers

You might need to do some research to identify new community partners. Here are a few resources that may help:

#### Civic and Social Organizations

- <http://local.findtarget.com/listings/>
- <http://www.atlist.org/organizations/civic-social-association>

#### Faith-based Institutions

- <http://worshipquest.org/>
- <http://churchangel.com/welcome.htm>

#### Volunteer Centers

Volunteer Centers are local agencies that connect people with volunteer opportunities at non-profit organizations. Volunteer Centers also provide training and resources for community-based volunteer programs. In order to post opportunities through Volunteer Centers, you must have a free account. Here's how:

1. Go to <https://www.1-800-volunteer.org/1800Vol/SearchVCForOrganization.do>
2. Search for your local Volunteer Center
3. Contact the most appropriate Volunteer Center to register for an account – <http://www.1-800-volunteer.org/1800Vol/OpenCreateAccountAction.do>
4. Your local Volunteer Center will notify you via e-mail once your account information has been approved.
5. Begin using 1-800-Volunteer.org to post volunteer opportunities.

#### **Media Outreach**

Media outreach is an efficient way to tell many people about SHIP volunteer opportunities. The people you reach may want to get involved, or they may spread your message by telling other people about SHIP opportunities. Be prepared – your outreach may get a big response!

Which of these outreach methods could help you recruit new volunteers?

- Radio or television
  - Interviews
  - Public service announcements (PSAs)

- Newspaper or newsletter
  - Advertisements
  - Articles
  - Editorials
  - Press releases

There are a variety of online resources that can help you with your media outreach. For example, the following website can help identify newspapers, television stations, and radio stations in your area: <http://www.congress.org/congressorg/dbq/media/>. You can also use the website to send electronic press releases and other communications to local and national media sources.

Florida's SHIP program, Serving Health Insurance Needs of Elders ([SHINE](#)), has a variety of replicable publicity tools available online in HAP's [Best Practices](#) section.

You can also advertise SHIP volunteer opportunities on the Internet. There are several websites that allow you to advertise volunteer positions for free, including:

- <http://www.idealists.org>
- <http://www.usafreedomcorps.gov>
- <http://www.volunteermatch.org>

### **Everyday Recruitment**

One of the easiest ways to enlist new SHIP volunteers is to incorporate recruitment into your everyday activities. Promote SHIP volunteer opportunities each time you give a presentation or participate in a health fair. Mention SHIP volunteer opportunities when you counsel a dedicated client or caregiver. Volunteer recruitment should be a continuous effort, not a once a year event!

### **Other Recruitment Resources**

There are many other resources that can help you recruit SHIP volunteers. You don't have to do it alone! Use existing resources to inform your recruitment process. Learn from the wisdom shared by other volunteer managers. Here are a few resources that may help:

- <http://www.energizeinc.com>
- <http://www.idealists.org/en/vmrc/index.html>
- <http://www.pointsoflight.org>
- <http://www.serviceleader.org>
- <http://www.volunteerresource.org>

## INSERT AGENCY LOGO

### **Media Release**

Date

#### **For Immediate Release**

Contact: [Name, Title](#)

[Phone Number](#) (office)

[Cell Number, if appropriate](#) (cell)

[Email](#)

### **Making a Difference for People with Medicare** **[Name of Agency](#) Needs Your Talents and Skills**

[City, State](#) - Navigating Medicare can be tough for many seniors. From prescription drug plans to private health plans to deceptive insurance agents, it's not surprising that people with Medicare are confused about their health insurance and their options. Fortunately, there is an organization that they can turn to for help.

The [\[Insert State\]](#) Senior Health Insurance Assistance Program (SHIP) works with people to help them understand their Medicare benefits, bills, and rights. SHIP services are free, confidential, and available to all [\[Insert State\]](#) Medicare beneficiaries, their families, and caregivers. Volunteers play a critical role in providing SHIP services and helping seniors.

Each volunteer makes a unique difference to people with Medicare. Volunteers help educate people about Medicare, market the SHIP program, assist with administrative tasks, work on special projects, and more. No matter what your interests or abilities, SHIP has an opportunity for you.

[Add a client \(or volunteer\) quote or a story from your SHIP](#)

The [\[Insert State\]](#) SHIP is looking for dedicated and resourceful volunteers with all sorts of talents and skills. You can be part of a dynamic team, meet new people, and set your own schedule. If you're looking for a meaningful way to help your friends, neighbors, and community, please call SHIP today at [direct agency phone number](#).

###

[Add your agency's organizational profile](#)

## Letter to the Editor

**For More Information:**

Name

Program, Organization

Address

City, State Zip

Direct Phone Number

**[Insert State] MEDICARE COUNSELING PROGRAM NEEDS YOU!**

The other day an elderly lady came into our office near tears. Mrs. M. had recently lost her spouse of over 50 years and she was being flooded with mail about her Medicare coverage. She came to our office because I am a Medicare counselor for the [Insert State] Senior Health Insurance Assistance Program (SHIP).

Our program provides free and objective Medicare education and counseling through the Area Agencies on Aging (AAA). Mrs. M. came to us after hearing about SHIP while at her AAA's senior fitness class.

After going through her mail and discussing what benefits Medicare covers, Mrs. M. gave me a hug of gratitude and left with her head held high.

This type of interaction is very rewarding. I work for a program where the need is growing and the workforce is not. That is why we need you! The [Insert State] SHIP is looking for dedicated and resourceful volunteers with all sorts of talents and skills. Our SHIP team connects all volunteers with roles that best suit their interests and abilities, and we know the value of each volunteer.

If you are looking for a way to help your friends, neighbors, and community and are passionate about serving older adults and people with disabilities, we hope you will call us today to become part of the [Insert State] SHIP team, [Insert local number].

## **Print Advertisement**

### **Want to Help Your Community?**

Join the SHIP volunteer team at your local  
Area Agency on Aging.

Your talents and skills are needed!  
Call SHIP today – [\[Insert local number\]](#)

The [\[Insert State\]](#) SHIP is a federally funded  
program that provides free health insurance  
education, counseling, and assistance to people  
with Medicare, their families, and caregivers.

Learn more online –  
[\[Insert local website\]](#)

## SHIP Volunteer Recruitment Plan

This worksheet can help you plan and track your volunteer recruitment activities.

1. Start by setting a recruitment goal.
2. Then, decide which recruitment strategies will help you reach that goal.

This worksheet can also help you track and evaluate the outcomes of your volunteer recruitment efforts.

1. First, record the outcomes of your recruitment-related activities.
2. Then, use that information to evaluate the success of your recruitment strategies.

This will help you determine which recruitment strategies make the best use of your valuable time and resources.

**GOAL: To recruit \_\_\_\_\_ volunteers between \_\_\_/\_\_\_/\_\_\_ and \_\_\_/\_\_\_/\_\_\_ including:**

- Administrative volunteer \_\_\_\_\_
- Counselor \_\_\_\_\_
- Intake Volunteer \_\_\_\_\_
- Marketer \_\_\_\_\_
- Special Projects volunteer \_\_\_\_\_
- Volunteer Educator \_\_\_\_\_

Strategy	Activity		Date Contacted	Outcome(s)
Partnerships	Current Partners	Identify organizations you currently work with that may be able to help you recruit potential volunteers.  1. _____  2. _____  3. _____		_____ _____ _____ _____
		Contact current partners to promote SHIP volunteer opportunities. Provide partners with volunteer position descriptions and other recruitment materials.  1. _____  2. _____  3. _____	1. _____  2. _____  3. _____	_____ _____ _____ _____

Strategy	Activity		Date Contacted	Outcome(s)
Partnerships	Current Partners	<p>Follow up with partners and offer to answer any questions. Try to gauge the success of the recruitment effort.</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p>	<p>1. _____</p> <p>2. _____</p> <p>3. _____</p>	<hr/> <hr/> <hr/> <hr/> <hr/>
	New Partners	<p>Identify new partner organizations that may be able to help you recruit potential volunteers.</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p><i>NOTE: Please see 'Strategies for Recruiting SHIP Volunteers' for ideas and resources that can help you identify new partners.</i></p>		<hr/> <hr/> <hr/> <hr/> <hr/>

Strategy	Activity		Date Contacted	Outcome
Partnerships	New Partners	<p>Contact new partners to introduce yourself and SHIP. Set up a time to discuss SHIP services, volunteer opportunities, and any partnership ideas. Provide partners with volunteer position descriptions and other recruitment materials.</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p>	<p>1. _____</p> <p>2. _____</p> <p>3. _____</p>	<hr/> <hr/> <hr/> <hr/>
		<p>Follow up with new partners and offer to answer any questions. Try to gauge the success of the recruitment effort.</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p>	<p>1. _____</p> <p>2. _____</p> <p>3. _____</p>	<hr/> <hr/> <hr/> <hr/>

Strategy	Activity	Date Completed	Outcome
Media Outreach	<p>Identify newspapers, newsletters, television stations, radio stations, and/or Internet websites that can help you advertise SHIP volunteer opportunities.</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p><i>NOTE: Please see "Strategies for Recruiting SHIP Volunteers" for tips on identifying media sources and free websites to advertise volunteer opportunities.</i></p>		<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
	<p>Write or develop media products to promote SHIP volunteer opportunities.</p> <ul style="list-style-type: none"> <li>• Articles <ul style="list-style-type: none"> <li>○ Quantity: _____</li> <li>○ Media Source(s): _____</li> <li>_____</li> </ul> </li> </ul>	<p>W = Weekly M = Monthly  Q = Quarterly A = Annually  O = Other</p> <p><input type="checkbox"/> W <input type="checkbox"/> M <input type="checkbox"/> Q <input type="checkbox"/> A <input type="checkbox"/> O</p>	<hr/> <hr/> <hr/> <hr/>

Strategy	Activity	Date Completed	Outcome
Media Outreach	<ul style="list-style-type: none"> <li>• Advertisements               <ul style="list-style-type: none"> <li>○ Quantity: _____</li> <li>○ Media Source(s): _____</li> </ul> </li> </ul>	<input type="checkbox"/> W <input type="checkbox"/> M <input type="checkbox"/> Q <input type="checkbox"/> A <input type="checkbox"/> O	<hr/> <hr/> <hr/> <hr/>
	<ul style="list-style-type: none"> <li>• Editorials               <ul style="list-style-type: none"> <li>○ Quantity: _____</li> <li>○ Media Source(s): _____</li> </ul> </li> </ul>	<input type="checkbox"/> W <input type="checkbox"/> M <input type="checkbox"/> Q <input type="checkbox"/> A <input type="checkbox"/> O	<hr/> <hr/> <hr/> <hr/>
	<ul style="list-style-type: none"> <li>• "Job" Postings               <ul style="list-style-type: none"> <li>○ Quantity: _____</li> <li>○ Media Source(s): _____</li> </ul> </li> </ul>	<input type="checkbox"/> W <input type="checkbox"/> M <input type="checkbox"/> Q <input type="checkbox"/> A <input type="checkbox"/> O	<hr/> <hr/> <hr/> <hr/>
	<ul style="list-style-type: none"> <li>• Press Releases               <ul style="list-style-type: none"> <li>○ Quantity: _____</li> <li>○ Media Source(s): _____</li> </ul> </li> </ul>	<input type="checkbox"/> W <input type="checkbox"/> M <input type="checkbox"/> Q <input type="checkbox"/> A <input type="checkbox"/> O	<hr/> <hr/> <hr/> <hr/>
	<ul style="list-style-type: none"> <li>• Public Service Announcements               <ul style="list-style-type: none"> <li>○ Quantity: _____</li> <li>○ Media Source(s): _____</li> </ul> </li> </ul>	<input type="checkbox"/> W <input type="checkbox"/> M <input type="checkbox"/> Q <input type="checkbox"/> A <input type="checkbox"/> O	<hr/> <hr/> <hr/> <hr/>

Strategy	Activity	Date Completed	Outcome
Media Outreach	Distribute your final products to the identified media sources.  1. _____  2. _____  3. _____	1. _____  2. _____  3. _____	_____ _____ _____ _____
	Follow up. Contact your media sources and offer to answer any questions about SHIP or SHIP volunteer opportunities.  1. _____  2. _____  3. _____	1. _____  2. _____  3. _____	_____ _____ _____ _____ _____ _____

Strategy	Activity	Date Completed	Outcome
Media Outreach	Participate in any follow-up interviews or articles, as applicable.  1. _____  2. _____  3. _____	1. _____  2. _____  3. _____	_____ _____ _____ _____ _____ _____

Strategy	Activity	Date Completed	Outcome(s)
Everyday Recruitment	<p>Incorporate SHIP volunteer recruitment into your client counseling sessions. Mention the volunteer opportunities when you counsel an informed, dedicated client or caregiver.</p>	Ongoing	<hr/> <hr/> <hr/>
	<p>Include SHIP volunteer recruitment in your outreach activities. Promote volunteer opportunities each time you give a presentation or participate in a health fair.</p>		<hr/> <hr/> <hr/>
	<p>As you develop community partnerships, make sure to tell your new partners about SHIP volunteer opportunities.</p>		<hr/> <hr/> <hr/>
	<p>Highlight current SHIP volunteer opportunities on your website.</p>		<hr/> <hr/> <hr/>

## **SHIP VOLUNTEER JOB DESCRIPTIONS**

### **Title: Administrative (or Clerical) Volunteer**

**Description:** To provide administrative support including data entry and other clerical duties.

**Supervisor:** SHIP Coordinator

### **Responsibilities:**

- Collect and report data on SHIP activities via a variety of methods including web-based tools
- Help with organizational activities such as stuffing packets and making copies of training and outreach materials
- Assist with setting up client appointments
- Other administrative support as needed

### **Desired Qualifications:**

- Strong organizational skills
- Ability to get along with others
- Good planning skills
- Proficient with the computer and the Internet
- Access to the Internet and email

**Title: Educator**

**Description:** To provide information about Medicare and related programs to members of the community.

**Responsibilities:**

- Deliver community presentations to a variety of audiences including Medicare beneficiaries, caregivers, and providers on selected topics
- Provide information about the Medicare program to new beneficiaries
- Educate individual beneficiaries on Medicare-related issues via the phone or face-to-face
- Utilize SHIP materials and other identified resources to stay up-to-date on issues affecting Medicare beneficiaries
- Attend basic and update trainings as required
- Complete required forms and/or reports about presentations and other education-related activities
- Keep all information pertaining to a client confidential
- Other education-related duties as needed

**Desired Qualifications:**

- Sensitive and caring attitude
- Good oral and written communication skills
- Proficient with the computer and the Internet
- Internet and email access
- Ability to get along with others

**Title: Intake Volunteer**

**Description:** Assist SHIP counselors by contacting Medicare beneficiaries to compile a list of their health coverage needs.

**Supervisor:** SHIP Coordinator

**Responsibilities:**

- Compile necessary information for beneficiaries requesting SHIP assistance
- Provide basic information about the Medicare program
- Assist counselors with client follow-up
- Stay up-to-date on issues affecting Medicare beneficiaries
- Complete required reports about education and counseling activities
- Other client support duties as needed

**Desired Qualifications:**

- Ability to get along with others
- Sensitive and caring attitude
- Comfortable working under tight timelines
- Good oral/written communication skills
- Proficient with the computer and the Internet
- Access to the Internet and email

**Title: Marketer**

**Description:** To promote community awareness of the SHIP program and its services.

**Supervisor:** SHIP Coordinator

**Responsibilities:**

- Distribute materials about SHIP to appropriate community partners including providers, churches, and social service agencies
- Represent SHIP at local community events such as county fairs
- Maintain good working relationships with community partners
- Develop media materials such as press releases
- Develop/maintain list of local media
- Develop promotional materials such as flyers
- Provide other marketing support as needed

**Desired Qualifications:**

- Good written and oral communication skills
- Ability to get along with others
- Good planning and organizational skills
- Active involvement in community groups, associations, and events
- Marketing, sales, advertising or public relations background
- Reliable transportation, valid driver's license, and clean driving record
- Proficient with the computer and the Internet
- Access to the Internet and email

**Title: Screener**

**Description:** To help beneficiaries apply for and access public benefit programs.

**Supervisor:** SHIP Coordinator

**Responsibilities:**

- Conduct intake interviews to learn more about a client's personal situation, including their health benefits and finances
- Screen clients for programs that may help them obtain health services including prescription drugs
- Screen clients for programs that may help people with limited incomes pay for their health care
- Help clients complete applications for benefits
- Attend basic and update trainings as required
- Complete required forms and/or reports related to screening activities
- Keep all information pertaining to a client confidential

**Desired Qualifications:**

- Ability to get along with others
- Sensitive and caring attitude
- Good oral and written communication skills
- Proficient with the computer and the Internet
- Internet and email access

**Title: Task Volunteer**

**Description:** To provide support for special, short-term projects that may be time-sensitive. Projects could include supporting outreach activities to reach “hard to-reach” populations or using graphic design skills to create catchy materials.

**Supervisor:** SHIP Coordinator

**Responsibilities:** Vary depending on the nature of the project.

**Desired Qualifications:**

- Ability to get along with others
- Flexible
- Internet and email access
- Proficient with the computer and the Internet



*Developed by HAP and SHIP programs in Alabama, Maryland, and Vermont*

## **SHIP VOLUNTEER APPLICATION**

**Applicant's Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_ **County:** \_\_\_\_\_

### **Contact Information**

Mailing address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip code: \_\_\_\_\_

Email: \_\_\_\_\_

Home phone: \_\_\_\_\_ Cell phone: \_\_\_\_\_

### **Emergency Contact**

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Home phone: \_\_\_\_\_ Other phone: \_\_\_\_\_

## **I. Volunteer Talents**

### **A. Which of the following SHIP volunteer roles interest you?**

- Insert SHIP volunteer role** – Insert brief description of responsibilities
- Insert SHIP volunteer role** – Insert brief description of responsibilities
- Insert SHIP volunteer role** – Insert brief description of responsibilities
- Insert SHIP volunteer role** – Insert brief description of responsibilities

### **B. Why are you interested in volunteering with SHIP?**

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**C. Are you fluent in any language other than English (including sign language)?**

Yes  No *If yes, please list the language(s):* \_\_\_\_\_

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**D. Skills and Interests (Please check all that apply.)**

- |  |  |
|--|--|
| <input type="checkbox"/> Computer/Internet                                   | <input type="checkbox"/> Organizing/Scheduling             |
| <input type="checkbox"/> Public speaking with large groups                   | <input type="checkbox"/> Public speaking with small groups |
| <input type="checkbox"/> Public relations/Communications                     | <input type="checkbox"/> Research                          |
| <input type="checkbox"/> Teaching/Training                                   | <input type="checkbox"/> Writing                           |
| <input type="checkbox"/> Data Entry  | <input type="checkbox"/> Graphic Design                    |
| <input type="checkbox"/> General Office Work                                 |  |
| <input type="checkbox"/> Assist individuals/One-on-one direct client service |  |
| <input type="checkbox"/> Other _____   |  |

**E. Availability**

Hours per month:  4 or less  5 to 10  More than 10

Preferred days and times:

- |                                    |                                  |                                    |
|------------------------------------|----------------------------------|------------------------------------|
| <input type="checkbox"/> Monday    | <input type="checkbox"/> Morning | <input type="checkbox"/> Afternoon |
| <input type="checkbox"/> Tuesday   | <input type="checkbox"/> Morning | <input type="checkbox"/> Afternoon |
| <input type="checkbox"/> Wednesday | <input type="checkbox"/> Morning | <input type="checkbox"/> Afternoon |
| <input type="checkbox"/> Thursday  | <input type="checkbox"/> Morning | <input type="checkbox"/> Afternoon |
| <input type="checkbox"/> Friday    | <input type="checkbox"/> Morning | <input type="checkbox"/> Afternoon |
| <input type="checkbox"/> As Needed |                                  |                                    |

**F. Are you licensed and able to drive an automobile?**  Yes  No

## **II. Experience**

### **A. Employer Information** (include paid and volunteer experience)

Retired  Yes  No

Company/Organization: \_\_\_\_\_

Dates of service: From \_\_\_\_\_ to \_\_\_\_\_

Contact person: \_\_\_\_\_ Phone: \_\_\_\_\_

Paid employee  Volunteer

Company/Organization: \_\_\_\_\_

Dates of service: From \_\_\_\_\_ to \_\_\_\_\_

Contact person: \_\_\_\_\_ Phone: \_\_\_\_\_

Paid employee  Volunteer

### **B. Education**

College/University: \_\_\_\_\_

Degree: \_\_\_\_\_

### **C. Optional**

Do you have any medical conditions you would like SHIP to be aware of?  Yes  No

*If yes, please describe:* \_\_\_\_\_

Do you require any special accommodations?  Yes  No

*If yes, please describe:* \_\_\_\_\_

## **III. References**

**Please list two references who are not related to you.**

Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Relationship: \_\_\_\_\_

Name: \_\_\_\_\_

Phone: \_\_\_\_\_ Relationship: \_\_\_\_\_

#### **IV. Screening Questions**

**A. Are you currently employed by any of the following:**

- Insurance company, agency or broker  Yes  No
  - Financial planning service  Yes  No
  - Health insurance claims or billing service  Yes  No
  - Law firm or legal services organization  Yes  No
  - Other (*please describe*)  Yes  No
- 

**B. If you answered yes to any of the above, please explain:** \_\_\_\_\_

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#### **V. Declaration**

I declare that the information provided and statements made in this application are true and complete to the best of my knowledge and belief. I also declare that I understand that the purpose of the training I receive as a SHIP volunteer is to provide services free of charge to Medicare beneficiaries and is not to be used for my personal monetary gain.

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

Please mail or fax this form to your local SHIP office at the address below.



*Developed by HAP and SHIP programs in Alabama, Maryland, and Vermont*

## **SHIP VOLUNTEER AGREEMENT**

As a volunteer for the State Health Insurance Assistance Program (SHIP), I agree to act within the scope of my responsibilities and abide by all program policies and procedures as specified in, but not limited to the following: volunteer job descriptions, handbooks, manuals, and other guidance. The SHIP is not responsible for any activity that I engage in or any responsibility that I assume other than those specified in the above mentioned program policies and procedures. Any action that I take outside the scope of responsibilities for my volunteer position will be taken at my own personal risk.

### **Nature of Volunteer Service**

- I understand that as a SHIP volunteer, I will be relied upon to serve Medicare beneficiaries and their community. The scope of responsibilities varies for each volunteer.
- I understand that my responsibilities may include providing accurate and objective counseling and assistance to Medicare beneficiaries, their representatives and caregivers, or persons soon to be eligible for Medicare.
- I understand that my responsibilities may include the use of internet-based programs to help clients compare health and prescription drug plan options.
- I understand that my responsibilities may also include educating the public on Medicare, Medicaid, and health insurance issues that affect older Americans and people with disabilities.
- I understand that my volunteer activities may need to take place at specific counseling sites, by telephone, or at clients' homes when health conditions make it necessary.
- I understand that I must submit monthly documentation of my activities to my SHIP Coordinator.
- I understand that SHIP volunteers provide services free of charge to any Medicare beneficiary who seeks assistance from the program.

### **Confidentiality**

- I understand that I will have access to certain files and other sensitive information about my clients, including medical, insurance, financial and other personal data of a sensitive or confidential nature.

- I agree to keep such information confidential and to use it only to perform my duties as a SHIP volunteer, to the extent that a client explicitly authorizes.

### **Non-Conflict of Interest**

SHIP volunteers cannot promote private or personal interests as they go about performing the duties described in SHIP program policies and guidelines. To comply with this requirement, I agree to the following:

- I will in no way attempt to conduct market research, or solicit or persuade clients to purchase or enroll in a specific type of health insurance coverage, to switch from one carrier to another to replace existing insurance coverage, to go to a specific provider of service for treatment, or to direct a client to a specific agent/broker, or to any profit-based billing service.
- I will not disclose or use confidential or other personal information obtained from a client through my association with SHIP for personal gain or the gain of my employer or any other party.

### **Agreement**

- I understand that as a \_\_\_\_\_ volunteer, I am committing to \_\_\_\_\_ hours each month.
- I agree to attend initial and update training programs as required.
- I agree to respect the confidentiality of my clients and to exercise good faith and integrity in performing my duties as a SHIP volunteer.
- I understand that a breach of this agreement will result in the termination of my volunteer service and may subject me to liability for harm that I cause to a client through a breach of confidentiality or acting outside the scope of my responsibilities.

Volunteer's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Coordinator's Signature: \_\_\_\_\_ Date: \_\_\_\_\_



*Developed by HAP and SHIP programs in Alabama, Maryland, and Vermont*