



Getting Started: A Guide for SMP Medicare Minute Coordinators

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Your Medicare Minute volunteers have been trained about Medicare. Now what?

The SMP Medicare Minute program is supported by a grant from the Administration for Community Living and is intended to help SMPs nationally reach people under 65 with Medicare with good information and assistance related to Medicare and detecting, preventing, and reporting fraud.

This guide is geared toward helping you through the next steps to launch your program and includes tips and best practices from the Medicare Rights Center and other Medicare Minute groups.

Being a coordinator takes time and effort, and things may not go smoothly at first. However, once the systems described in this guide are in place, the program becomes more routine and no longer requires as much effort on your part. Over time, you will find rewards in the relationships you develop with your volunteers, the knowledge you acquire and the important service you provide to your community.

We hope the following tips, compiled from various Medicare Minute groups, give you ideas and strategies about how to make the Medicare Minute program a fulfilling experience for you and your Medicare Minute volunteers. Remember, the most important thing is to have fun getting to know your volunteers and helping people with Medicare!

Sections in this guide:

- Identifying Medicare Minute volunteers
- Conducting trainings
- Identifying Medicare Minute presentation sites
- Preparing Medicare Minute volunteers to give presentations
- Scheduling volunteer update meetings
- Communicating with Medicare Minute volunteers between meetings
- Keeping records of Medicare Minute presentations
- Volunteer education and encouragement
- Keeping volunteer morale high
- Setting goals
- Each volunteer and each audience is different
- Document checklist
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Identify Volunteers

- Before you launch your Medicare Minute program you will want to make sure that you have a few dedicated volunteers.
- It is not necessary to have many Medicare Minute volunteers in place when you initiate the program. However, it is important to ensure that the volunteers you have recruited for the program understand the commitment the Medicare Minute requires.
- As you already have volunteers who work with your organization, you may want to pick certain volunteers who can contribute specifically to the Medicare Minute program.
- Over time, you will select and train more volunteers as your Medicare Minute program becomes more established.

Conduct Trainings

- You will prepare your volunteers to give Medicare- and fraud-related presentations in their community. Medicare Rights will provide you with the tools you need to train your volunteers.
- All volunteers should receive a Medicare Minute Orientation. Medicare Rights can also provide materials to facilitate a Presentation Skills Training for volunteers who wish to sharpen their public speaking and general presentation skills.
 - The SMP Resource Center also has training available on outreach skills and presenting.
 - Please click here for a link to the SMP volunteer trainings available:
http://www.smpresource.org/AM/Template.cfm?Section=Volunteer_Training1&Template=/CM/HTMLDisplay.cfm&ContentID=4850
- It is assumed that SMP volunteers are already acquainted with Medicare basics. However, you can inform the Medicare Rights Center of volunteer questions and additional needs.
- Throughout the course of the program you will continue training your current and newly recruited volunteers. You will review monthly Medicare Minute topics with them and can contact Medicare Rights if you require any additional refresher trainings.

Identify Medicare Minute presentation sites/venues.

- The SMP Medicare Minute program is intended to reach people with Medicare under 65. Therefore, you should target sites that serve this particular population. If you need recommendations on how to locate or reach out to these sites Medicare Rights can provide you with additional materials to facilitate this process.
- It's up to you to make sure the volunteers are connected to venues in the community where they can give regular Medicare Minute presentations. It's best to do this soon after the initial training; you don't want them to lose the momentum and excitement from their training.
- Connecting a volunteer to a presentation site can be easy if the volunteer is already part of a community center, places of worship, or social group that would be interested in hearing Medicare Minute presentations.

- Volunteers can give Medicare Minutes in a number of different venues: community centers, places of worship, libraries, housing developments, etc. Presentation sites should be convenient for the volunteer.
- If the volunteer doesn't have a presentation site in mind, the coordinator generally does outreach to find one. If volunteers opt to do their own outreach, coordinators should monitor and give support (advice and materials).
- Each host organization reaches out to potential presentation sites in different ways, by calling, sending letter, or sending e-mails. You should have descriptions of the Medicare Minute program, your organization, and the Medicare Rights Center handy as you're doing outreach. You will need to explain who you are and the intent of the Medicare Minute. Venues may think that you are with an insurance company or may be skeptical about your motives. Medicare Rights has pre-made template letters and phone scripts for outreach purposes that explain the Medicare Minute program and its educational mission.
- Medicare Minutes are best scheduled before, after, or during pre-existing meetings or events. This way, you can schedule them for the same time each month and send the same volunteer or group of volunteers each time. (For example, volunteer Ms. P might give a Medicare Minute at Happy Valley Community Center every third Tuesday of the month at 11:30a.m., before the center's lunch service.)
- Some volunteers share a presentation site by going in pairs or alternating every other month. Going in pairs can be a good way for new volunteers to get comfortable presenting. Presentation partners may want to set up a schedule between the two of them so they both get the chance to present.
- Volunteers may give presentations at sites that are not good fits for them. There's nothing wrong with this. It may take a few attempts to find good presentation sites.

Prepare volunteers to give presentations.

- Some volunteers may be very comfortable with public speaking, but others may need more practice and encouragement to get in front of a group. The Medicare Minute program can help volunteers improve their public speaking skills through practice and support from their peers.
- You may ask new Medicare Minute volunteers to shadow experienced volunteers so they can see what a presentation should look like.
- Practice, practice, practice! Practice and presentation are key for volunteers to feel their best when they present a Medicare Minute.
- Many Medicare Minute groups spend time during the update meeting talking about presentation skills and strategies to manage nervousness. It's often helpful to let volunteers practice presenting during meetings.
- In some groups, the Medicare Minute coordinator goes to the first Medicare Minute presentations a volunteer gives until the volunteer feels comfortable doing it alone. The coordinator may also help answer audience questions first.
- Give volunteers name tags to wear during their presentations.
- The Medicare Rights Center has presentation skills training materials available for Medicare Minute partners.

- The SMP Resource Center also has training available:
http://www.smpresource.org/AM/Template.cfm?Section=Volunteer_Training1&Template=/CM/HTMLDisplay.cfm&ContentID=4850

Schedule volunteer update meetings.

- Monthly Medicare Minute volunteer update meetings are essential. Some groups hold volunteer update meetings twice a month. They typically run about an hour.
- The first Medicare Minute volunteer update meeting should be within a month after the Medicare training. Update meetings are an opportunity for volunteers to refresh their Medicare training each month.
- Give Medicare Minute volunteers the information and materials they need for their Medicare Minute presentations at the update meetings. Volunteers can discuss their recent Medicare Minute presentations together, which keeps volunteers engaged and builds camaraderie.
- Ask new Medicare Minute volunteers *at the training* when they prefer to have update meetings (mornings or afternoons, and day of the week). Pick a location that's easy to reserve and convenient for everyone (i.e. the place where the training was held).
- Set a regular schedule for the update meetings—most find it best to schedule meetings for the same week/day/time each month. Alert volunteers of meetings by phone or e-mail. You may want volunteers to RSVP. Let them know their attendance at the meetings is important (follow up with volunteers who cannot attend).
- Some host organizations (especially in rural areas) offer a call-in option when volunteers can't attend the update meetings. However, it's better to have volunteers attend in person if possible.

Find the best way to communicate with volunteers between meetings.

- You need a way to communicate with Medicare Minute volunteers. Create and maintain a Medicare Minute volunteer contact list with e-mail addresses and phone numbers. If volunteers want to share their contact information with other volunteers for support and practice, you might create a contact list to distribute to the group.
- You may also include on your contact list details about volunteers' schedules and travel preferences. For example, make a notice if they will only travel a certain distance from home or can only volunteer certain days of the week. This way, you'll know which volunteer to speak to when a presentation request comes up.
- You may set up an e-mail distribution list of phone tree for announcements, or create a website where you post news and updates.
- Give volunteers a way to get in touch with you.

Keep good records of Medicare Minute presentations.

- Medicare Rights requires partner organizations to track the number of Medicare Minute presentations and number of attendees. This allows us to gauge program impact and report to funders.
- Presentation information should be submitted to Medicare Rights online, using the following presentation log form. This online presentation log should be filled out for every Medicare minute presentation: <http://medicarerights.force.com/presentationlog>
- The form is short and easy: enter the volunteer information (volunteer name, name of your organization, presentation site) along with the presentation details (date, topic, audience size). There is a space to enter feedback and comments, but this is optional.
- A hard copy of the presentation log is available for volunteers to fill out by hand. Volunteers should bring completed presentation logs to update meetings for collection. You would then submit the information to Medicare Rights via the online system.
- If you are unable to hold in-person update meetings, have volunteers submit their completed presentation logs to you via e-mail, fax, or postal mail.
- The coordinator should have a running schedule of all upcoming Medicare Minutes, which all volunteers can see. You may want to confirm presentation topic, site, and dates via e-mail with the volunteers *and* your contact at the presentation site each month. Review the schedule at the volunteer update meeting to give volunteers the opportunity to make changes and keep them informed of all the Medicare Minute presentations that are happening.
- Make sure you receive logs for each Medicare Minute presentation. Follow up with volunteers who do not submit their logs.
- Medicare Rights can pull reports from its online database that compile all the presentation log information you enter. These can be provided to you as needed and customized with the type of information you want to see.

Find ways to continually educate and encourage volunteers.

- Volunteers need continual updates and training on 1) Medicare information and 2) public speaking skills. The Medicare Minute orientation is just the first step in the long journey of learning how to convey Medicare information to their audience members.
- Some coordinators run the volunteer update meeting like a study group. They read the Medicare Minute materials together as a group, allowing volunteers to stop and ask questions during the reading. If there's an unknown answer, the coordinator writes down the question, researches it, and brings the answer to the next meeting.
- Discuss ways to manage difficult audience questions or comments. Volunteers should be trained on where to refer in-depth Medicare problems or personal questions from the audience. They may refer questions to the Medicare Rights helpline or another agency.
- Let volunteers know they don't have to be experts—nobody knows all the answers! Remind volunteers there are resources available and that the most important thing is that their audience gets the correct information.

Keep volunteer morale high.

- Volunteers should feel needed and engaged. For example, if they are assigned to a presentation site with low attendance (only a few people) they may get discouraged. You may consider finding a different site for them where they can reach a larger group/
- Even small perks can boost their motivation and make them feel appreciation—for example, giving them certificates when they reach milestones like finishing the training or volunteering for a full year.
- Remember they are volunteering their time—while the program does require a certain level of commitment, allow volunteers to go at their own pace. Try to work with their schedules and needs.

Set short-term and long-term goals.

- You may not be able to connect all volunteers to presentation sites right away. Setting goals for yourself and for volunteers is a good way to manage expectations. For example, before the first volunteer update meeting, you can ask volunteers to come up with a list of five locations where they'd like to give presentations. As homework for the second meeting, you can ask them to call or visit those five locations to try to establish a connection.
- As a long term goal, you may want to set a number of presentations you'd like to give or audience members you'd like to reach.

Remember that each volunteer and each audience is different.

- Some volunteers may need more or less encouragement and training in certain areas than others. They all bring valuable experience and knowledge to the table. The above tips are just suggestions. Feel free to tailor your meetings to fit the needs of your volunteers.
- Likewise, your volunteers may speak to very diverse audiences in terms of income, age, and other demographics. They should make an effort to find the most effective way to communicate the information to the people at their presentation sites.

Document Checklist

Important documents every SMP Medicare Minute volunteer coordinator should have:

- Volunteer contact list
- Volunteer availability and travel preferences
- List of potential Medicare Minute sites in the community
- Schedule of all Medicare Minute presentations
- Written descriptions of the Medicare Minute program, the SMP, Medicare Rights Center
- Phone number of organization where volunteers can refer audience questions
- Presentation log form (provided by Medicare Rights)

Optional Materials from Medicare Rights Center

- Sample update meeting agenda
- Sample outreach scripts and promotional materials
- Presentation skills training