

Volunteer Training: Shifting to a Task-Based Culture **Q&A with Audrey Pitchford, Curriculum Developer** **Washington State SHIBA HelpLine**

Preparing volunteers with the information and skills they need to successfully educate, assist, and counsel clients of all ages—including Medicare beneficiaries—is a difficult task. There are so many complex health needs, so much technical knowledge to learn, and so much at stake. That is why Washington State's SHIP program, Statewide Health Insurance Benefits Advisors ([SHIBA](#)) HelpLine, is shifting from a volunteer training culture that centers around content knowledge to one that trains volunteers based on the tasks of their volunteer roles.

Training programs evolve over time and the SHIBA HelpLine is beginning its third year of training volunteers using a task-based curriculum. Tobi Johnson, Director of Washington State's SHIBA HelpLine, and Audrey Pitchford, SHIBA's Curriculum Developer, delivered a presentation called [Learning by Doing: Moving from a Knowledge-based to a Task-based Volunteer Training Culture](#) at the SHIP Directors' Conference in May 2008. The response was tremendous. In case you missed it, in the following Q&A Audrey describes SHIBA's evolving volunteer training program and some of the lessons they've learned along the way.

If you have further questions about how the SHIBA HelpLine prepares their volunteers for service, please contact Audrey at audreyp@oic.wa.gov.

Why shift to a task-based volunteer training culture?

The SHIBA HelpLine volunteer program currently engages about 250 volunteers statewide who serve in various roles, including outreach, counseling, administrative, public speaking, and leaders of special projects. Since the beginning of the program in 1976, the volunteer program has grown and changed and so have the trainings.

Two years ago, my colleagues and I got together to assess the volunteer training program. The amount of training content was resulting in information overload. We explored research on training, including the Adult Learning Theory, and task-based training models through [Langevin Learning Services](#). We decided to spend more classroom time preparing volunteers for their job tasks, so volunteers knew what to do with the flood of technical knowledge.

What does your training program look like?

Our staff spent time observing how tasks are performed by volunteers. For example, we examined the steps it takes to get from setting an appointment with a client to finalizing the counseling session. Now we are using what we observed to develop [task analyses](#),

or detailed lists of steps, for all volunteer processes. These task analyses are the basis for our training curriculum.

We are working to split our technical modules into two levels. Basic classes are suitable for all volunteers, and more advanced classes aimed at folks wanting to volunteer in our highest-functioning roles, such as counselors. This way, if a volunteer comes in to do outreach, they will only have to take the courses they need to fill that role, and not take classes intended for more advanced work. All of our [new volunteers](#) go through an orientation.

Throughout the training we ask the volunteers to do some pre-work, which is crucial to classroom performance. For our counseling modules, the pre-work contains the bulk of the technical content. We tell new volunteers that some self-study will be necessary, especially for roles such as counseling. Once volunteers are in the classroom, we keep them engaged with a training workbook, visual aids, and lots of interactive activities. We send volunteers into their new roles with support tools, including [quick reference cards and job aids](#).

What advice can you share?

It is crucial to clearly define the scope of your volunteer program, as this is at the root of knowing what roles exist and what tasks volunteers need to do in each role. We also found that our initial stab at task-based training focused specifically on counselors, and that we also needed to explore the work our volunteers performed in other roles, including administrative, data entry, outreach, and public speaking.

Our volunteer training program is still evolving. We've tried some things that work and we're exploring whether some of what we've tried is worth the investment. We are still working out complex questions of how to offer flexible training options for the volunteers, while not exhausting finite staff resources. For states without a dedicated curriculum writer, I imagine developing state-specific training materials, and exploring ways to improve the training program, would be challenging.

Ultimately, we are all working toward the goal of a volunteer program where our volunteers are comfortable and confident with both their roles and their knowledge of the content specific to their roles. This type of training takes more time than the traditional lecture-based training method, and requires different activity on the part of both the trainer and the learner. However, we expect that training volunteers specifically for their roles using task-based tools will ultimately produce more competent, capable volunteers.