

Washington SHIBA Training Program

Initial Training

The Washington state SHIP, the Statewide Health Insurance Benefits Advisors (SHIBA) Helpline, has transformed its volunteer training program over the past three years. SHIBA has moved from knowledge-focused training to a model that trains volunteers based on tasks they will perform in their SHIBA roles. The new training is based on adult learning theory and task analyses that identify competencies volunteers need to have when they finish training. For more information about SHIBA's task-based training, click [here](#).

The length of initial volunteer training varies based on the role volunteers choose. Roles may include administration, outreach, data entry, public speaking, counseling, and other roles the local SHIBA groups need. Because SHIBA serves clients of all ages, including folks under age 65 who are not on Medicare, volunteers interested in the most complex roles (such as counseling) may spend as many as 32 hours in class, as well as additional time studying and doing other activities outside of class that further their learning.

Due to the amount of information covered in training classes, SHIBA encourages volunteers to use their resources. Remembering everything is not always possible – but it is always okay for volunteers to look up information. SHIBA maintains all participant training materials online on its Web site, and provides volunteers with tools and suggestions on ways to organize their own reference material.

Mentoring

After SHIBA volunteers complete their initial training, they are informally mentored by an experienced volunteer or staff member. Their mentors show them the ropes and help them learn firsthand how to work with clients. New volunteers may be mentored in-person or over the phone, which can sometimes be tricky if both people aren't in the same office. Depending upon the experience and comfort levels of the new volunteers, the mentoring process can last one to six months. Once new volunteers feel confident, they can take the reins and do the counseling themselves.

Update Training

To help volunteers stay abreast of ever-changing information, the SHIBA HelpLine offers Update Training almost every month. Eight of the yearly Update Trainings have a structured, statewide agenda, and two Updates are open for local agendas. All volunteers must attend the first half of Updates, often lasting one to one and a half hours. Counselors must attend the whole session, which may be two to three hours. Volunteers who miss their local Update may attend a phone make-up session.

Looking ahead

The next step for SHIBA is to develop a certification process for volunteers. SHIBA has started planning for its volunteer certification efforts and believes the new training curriculum will provide a strong foundation for such a certification process. SHIBA is considering developing three levels of volunteer mastery: (1) “I can do it with someone’s help;” (2) “I can do it on my own;” and, (3) “I can teach other people to do it.” SHIBA views certification as including many elements, such as classroom training, self-study, mentoring, evaluation, and observation. SHIBA wants it to be another tool to help support its volunteers in having both the knowledge and skills needed for their roles.

As part of volunteer certification, SHIBA may need to formalize its mentoring process. Overall, SHIBA has found mentoring to be very helpful to new volunteers. SHIBA wants to ensure mentoring is applied evenly, so it provides check lists for mentors to focus on with new volunteers.

Advice from WA SHIBA

Once we started focusing on our volunteers’ tasks, we quickly saw how many different and varied roles our volunteers fill! This gave us an opportunity to see where we needed to develop more program infrastructure to help support volunteers, especially those filling non-counselor roles. Our training program continues to evolve based on lessons learned and volunteer feedback about the ways we can best help them help people in their local communities around the state.