



2017 SMP/SHIP National Conference

JULY 10–13, 2017 AUSTIN, TX

Educating Stakeholders About SMP and SHIP

Education vs. Lobbying

	Can we do it with federal funds?	What is it?
Education	Yes	Providing information
Lobbying	No	Telling people what they should do, believe, or how they should vote on based on the information

So, you've decided to be an educator...

- You can:
 - meet with your policy makers (local, state, and federal)
 - share stories with the public, policy makers or their staff
 - tell people why you have taken the position you have
 - partner with (other) grassroots organizations to communicate the messages
 - direct people to your website
 - educate people of the effects of a potential policy

So, you've decided to be a lobbyist...

- You cannot lobby during the time that you are being paid to work on the federal grant
- You cannot use tools that are paid by the grant to lobby
- If your organization receives funds other than federal funds and part of the time you are paid by those funds, you may be able to lobby during the time you are paid by those other funds if it is allowed by that funder.

Don't Stop at Congress!

- State-wide Partners
- Sub-grantees / sub-contractors
- Local and Regional Media
- Local / State Leaders (mayors, city councils, state legislators)

Last Request

- *Please, pretty please, pretty please with sugar on top:*

Make sure your teams and stakeholders know that your program is the national SHIP or SMP program!





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Tennessee Education

Shannon Jones, SHIP Director



2017 SMP/SHIP National Conference

Aging Commissioner Letter to Senator Corker

STATE OF TENNESSEE
COMMISSION ON AGING AND DISABILITY

Andrew Jackson State Office Building
502 Deaderick Street, 9th Floor
Nashville, Tennessee 37243

Phone (615) 741-2056

Fax (615) 741-3309

Jim Shulman
Executive Director

January 10, 2017

The Honorable Bob Corker
425 Dirksen Senate Office Building
SD-425
United States Senate
Washington, DC 20515

RE: TN SHIP Information; M

Dear Senator Corker:

The Tennessee Commission on Aging and Disability (TNCAD) provides oversight and administration of the Tennessee State Health Insurance (TN SHIP) program. TNCAD has the responsibility of providing information and direct resources to older Tennesseans who are eligible for TN SHIP. TNCAD also provides information and direct resources to older Tennesseans who are eligible for TN SHIP.

TN SHIP is a program that provides coverage for prescription drugs, medical services, and other health care services to eligible Tennesseans. TNCAD also provides information and direct resources to older Tennesseans who are eligible for TN SHIP.

Having just concluded the Open Enrollment Period for Medicare (October 15 – December 7), TN SHIP's program data was reviewed and analyzed and the impact the program had on Tennesseans is impressive. During that limited period, TN SHIP assisted 18,917 Medicare participants; as a direct result of that assistance, over 1,630 beneficiaries were able to avoid \$3.5 million dollars in 2017 cost increases by directing them to more individually cost effective plans.

Many of the Medicare beneficiaries who were helped by TN SHIP were on higher cost plans or were on plans that were making costly coverage or price changes for their 2017 prescription drug needs. The average yearly cost savings per person for those 1,630 plus beneficiaries was \$2,175.70.

Thanks to the funding provided by Congress, aging programs such as TN SHIP are helping and assisting Tennesseans on a daily basis.

If you have constituents that need Medicare help, please give them the TN SHIP toll-free hotline number 1-877-801-0044. If you have constituents that need any type of aging assistance in Tennessee, please refer them to our toll-free number 1-866-836-6678.

Advisory Council Letter to Senator Alexander

March 1, 2017

The Honorable Lamar Alexander
U.S. Senator, Tennessee
455 Dirksen Senate Office Building
Washington, DC 20510

REF: Funding for TN State Health Insurance Assistance Program (SHIP)

Dear Senator Alexander:

The Aging Commission of the Mid-South (ACMS) has the responsibility for the oversight of Older American Act services in Fayette, Lauderdale, Shelby, and Tipton counties in West Tennessee. ACMS ensures that meals are provided for hungry seniors and provides information and direct services to older

Tennesseans who have scarce resources. At the federally funded TN State Health Insurance

TN SHIP is funded through the Administrative service that allows for comprehensive Medicare. To the extent, these services are not provided by a for their needs and avoid plans which may be one-on-one Medicare counseling sessions, it

Thanks to the funding provided by Congress, TN SHIP is helping and assisting Tennesseans on a daily basis. TN SHIP is not a duplicative program, as the majority of Medicare consumers who rely on TN SHIP need direct and personalized counseling. Calling the national Medicare hotline may not help beneficiaries with their individual questions and issues.

On behalf of the Advisory Council of the Aging Commission of the Mid-South, we sincerely urge the Senate to continue to provide funding to the TN SHIP. It is vital that our seniors have access to the only federal program that provides free, personalized, unbiased counseling on the growing complexities of Medicare coverage. Please contact Dora Ivey, ACMS Executive Director, at 901-222-4150 if more information is needed concerning our support for TN SHIP.

Sincerely

Alvin Pearson
Advisory Council Member

Education One Pager



SHIPs Provide Critical Services to Medicare Beneficiaries

SHIP in Tennessee provides a network of free, unbiased, reliable, and personalized health benefits information.

- In Tennessee, SHIP helps Medicare beneficiaries make choices among a vast array of options that include an average of more than 24 prescription drug plans, 60 Medicare Advantage plans, as well as multiple Medigap supplemental insurance policies.
- In Tennessee, SHIP also provides assistance with Medicare fraud and abuse issues, billing problems, appeal rights, coordination with Social Security programs.
- In Tennessee, client contacts have increased over the past year.

SHIP in Tennessee provides community education and outreach to beneficiaries and their families in 2016.

- In Tennessee, SHIP hosted 435 enrollment events for beneficiaries and their families in 2016.

SHIP in Tennessee provides assistance to beneficiaries and those facing language and cultural barriers.

- In Tennessee, 43.1% of SHIP contacts were from beneficiaries with limited English proficiency.
- In Tennessee, 16.1% of SHIP contacts were from beneficiaries with limited health literacy.
- In Tennessee, 0.8% of SHIP contacts were from beneficiaries with limited cognitive ability.

SHIP provides critical resources and expertise to federal partners.

- The Social Security Administration, CMS, 1-800-Medicare, Medicare Advantage plans, Medicare Part D prescription drug plans, local and state agencies and Congressional representatives and staff refer beneficiaries to SHIP. They include SHIPs in their websites, publications and correspondence to beneficiaries as the source of assistance when individuals need one-on-one assistance.
- In Tennessee, 54.7% client contacts were referred from federal partners.

Defunding SHIP would harm Medicare beneficiaries in Tennessee.

- Defunding SHIPs would mean 1,224,504 beneficiaries in Tennessee and 55 million beneficiaries nationwide would no longer have access to free, unbiased, personalized Medicare counseling services.
- Defunding SHIPs would increase out-of-pocket costs to Medicare beneficiaries in Tennessee. In 2016, TN SHIP piloted tracking the amount of prescription drug costs saved by helping clients find the lowest cost drug plan. This pilot project helped participants save over \$3.6 million who then were able to purchase food and other necessities due to their savings with the help of TN SHIP counselors.
- Defunding SHIPs would mean elimination of resources to recruit, train and organize volunteers that are crucial to SHIPs reach and one-on-one efforts. In Tennessee, volunteers gave 22,590 hours to serve beneficiaries through SHIP in 2015. TN SHIP volunteers donated time valued over \$521,151.30 to helping Medicare beneficiaries (volunteer time valued at \$23.07 per hour in 2014).

Education One Pager



SHIP Successes in Tennessee

- Thank you TN SHIP for your advice about Medicare. I got Part C coverage that includes drug coverage for \$60. Most of my medications are free with no deductible and the most expensive is \$40. That's the one I haven't been able to take for several years because of the cost. Last year I had to pay \$80 for my pain medication and this year it's only \$12 which saves me enough to pay the insurance cost. I've been without my medications and it has caused problems. Thanks again for your advice.
Bobby Cross, Benton, TN
- While at the Coffee County Senior Center during the Open Enrollment Period I did a drug plan comparison for a Medicare beneficiary. His current plan was not going to cover two of his many prescriptions next year and his cost was going to be \$8,000 a year. I found another plan that would cover all his drugs and cost was down to \$3,000 per year and helped him enroll in that plan. Several months later I saw the beneficiary at the center and he said how much he liked his new plan and thanked me again for helping him.
Mike David, TN SHIP Volunteer



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Oklahoma Education: Demystifying the Hill Visit Experience

Ray Walker, SHIP and SMP Director

The Time to Start Preparing for the Visit is Now!

- If you haven't begun, start by identifying staffers in your state.
 - Ask for a meeting
 - Educate them on the Program
 - Ask them how they currently address related issues
 - Actively listen!
 - Offer your program's services for their benefit!
 - Stay in touch...turnover can be an issue



Other Ways to Get Connected Back Home

- Research their websites
 - Identify where they have offices in your state and visit them!
 - Look for opportunities to visit with legislators when they're home
 - Town Hall Meetings (great way to use volunteers!)
 - Regularly schedules “coffee talks”
 - “Task Force” meetings
 - Monthly/Quarterly Reports



When the Call To Action Comes:

- Ask local staffers for introductions to DC staffers
 - Can do this before the call to action, but be careful not to offend the local staffers...they're important too!
- Reach out to DC staff with a brief description of the issue and a request to meet with them.
 - Include some quick, key numbers regarding your program in the request



Scheduling

- Allow as much time as possible for scheduling your meeting
 - If that's the purpose of your trip, no problem
 - If you're meeting in conjunction with a conference, reach out as soon as you know the conference schedule.
 - Be flexible! High probability it will need to be rescheduled at least once.
 - But make sure they understand your time limitations too! You don't live in DC!

The Meeting

- Give yourself plenty of travel/walking time!
 - Especially if you are making multiple visits
 - Can be useful when scheduling times for your meetings
- If possible, find their office(s) in advance of the meeting
 - Helps you gauge your time on meeting day
- Arrive early for your meeting, but not too early!



The Meeting

- Come Prepared!
 - Provide documentation/outline of the information you are sharing, especially numbers!
 - Even if you sent it previously electronically
 - Think “Job Interview/Resume”
 - Keep it brief! Outlines are appreciated.
 - Put it in a folder
 - Makes it easier for them to get their hands on it if they need to.



During the Meeting

- Again...think job interview!
 - Smile and handshake
 - Wait to be asked to sit, unless they're already seated
 - Be friendly but get to the point...time is important to them
 - Make good eye contact, but don't stare them down
 - Remember to relate it to "Home".
 - (where the voters live...)



After the Meeting

- Thank them for the opportunity
- Follow up with a thank you letter
 - Summarize any key topics you want to highlight
 - Make sure you mention any issues THEY presented!
- Don't lose touch!
 - They get lots of requests for lots of meetings on lots of topics
 - Be a squeaky wheel...but don't grind the gears!





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North Carolina Education

Kevin Robertson, Director for the NCSMP
Program and SHIP Compliance Officer

Insurance Commissioner Letter to Representative Rouzer



Tel 919.807.6000 Fax 919.733.649

April 5, 2017

The Honorable David Rouzer
US House of Representatives
424 Cannon House Office Building
Washington, DC 20515

Dear Representative Rouzer,

I write to request assistance in Insurance Information Program Programs (SHIPs). Last year, the funds awarded to the state SHIP Continuing Resolution funding budget includes a devastating cut, the likely cut from the Senate bill funding at current levels.

North Carolina
2016, through
assisted over
These costs
SHIP saved

total amount Congress awards to SHIPs nationwide. These savings are particularly important to the many vulnerable Medicare beneficiaries who are living on a fixed income.

NC SHIIP began in 1986 and has worked for over 30 years assisting North Carolinians. With almost 1,000 volunteers representing all 100 North Carolina counties, there is a SHIIP office in every county typically housed in an existing human services agency where trained SHIIP volunteers assist their neighbors with important decisions about Medicare. Services SHIIP provides are objective and impartial which is an appealing aspect of the program, and these services are available to Medicare beneficiaries, caregivers, and adult children of Medicare beneficiaries. Additionally, SHIIP aids hundreds of consumers referred by Legislators and Congressional members.

The free services provided by SHIIP differ from the assistance offered by 1-800-MEDICARE. With SHIIP, consumers receive help with difficult and time consuming issues that 1-800-Medicare is either unwilling or unable to resolve. In fact, NC SHIIP receives thousands of referrals from 1-800-MEDICARE annually. Our SHIIP volunteer counselors are trained insurance experts who provide case management year-after-year to all consumers and many seniors who rely on the SHIIP program to provide ongoing counseling.

A fact sheet about our program is enclosed along with the documented savings our staff and volunteers reported last year (NC SHIIP Data – Congressional District). Our SHIIP Director, Van Braxton, is prepared to answer any questions you have regarding this program and the services we provide and can be reached 919-814-9946.

Data by Congressional District

NC SHIP Data

North Carolina Congressional Districts with Amount of Money Saved and Client Contacts - Dates 01/01/2016-12/31/2016

Mark Walker				
District 6	Money Saved	Client Contacts	# of Coordinating sites	Volunteers
Alamance	\$115,092	1,075	1	9
Caswell	\$313,549	393	1	3
Chatham	\$96,620	741	1	17
Guilford	\$608,347	2,354	1	19
Lee	\$655,726	786	1	6
Person	\$17,788	279	1	2
Randolph	\$1,140,022	2,643	1	11
Rockingham	\$20,000	406	1	5

Total Clients SHIP Served in NC: 105,195
Number of clients through State Office: 37,180
Total amount saved by SHIP Statewide: \$44,333,514
Total amount saved by State Office: \$10,616,945

NC Education One Pager

NCSHIIP Activities in 2016:

- Helped North Carolina Medicare beneficiaries save **\$44.3 million**.
- Counseled more than **105,000** Medicare beneficiaries.
- Served almost **21,000** Medicare beneficiaries with disabilities.
- Counseled more than **29,000** beneficiaries with incomes below 150% of federal poverty level.

NCSHIIP is:

- **Unique.** NCSHIIP is the only organization in the state that provides unbiased, accurate, highly-personalized one-on-one counseling about Medicare by phone and in-person in all 100 counties in North Carolina.
- **Effective.** NCSHIIP helped save North Carolinians more than **\$44.3 million** on Medicare coverage and prescription drugs in 2015 alone. **This is close to the \$52 million that is appropriated for all SHIPs nationwide** that is being proposed for elimination in the President's Budget.
- **Cost-efficient.** NCSHIIP uses a small paid staff and a network of approximately 1,000 trained volunteer counselors to meet the needs of North Carolina's 1.8 million Medicare beneficiaries.
- **Dependable.** Local, state and federal agencies, members of the state legislature, members of Congress and their staff, the Centers for Medicare and Medicaid Services, the Social Security Administration and other sources routinely refer beneficiaries to NCSHIIP. Beneficiaries often need help that cannot be provided by 1-800-Medicare or through online or printed materials.

With eliminated federal funding, NCSHIIP would be severely impacted and would not be able to provide the same high level of service, and partner agencies will have to find new ways to help beneficiaries who need Medicare information and counseling.