

**SHIP Medicare Impact 2017-2020**  
**Mary Loftis – State Health Insurance Assistance Program (SHIP)**  
**Counselor since 2006**

Since 2017 approximately \$1,790,229.00 has been saved by 3,119 individuals in Burt, Dodge and Washington Counties by comparing their drug & health plans as well as counseling regarding enrollment in Medicare, Medicare Advantage, Social Security, & Medicaid. In the prior 5 years, over \$913,000 was saved by your local constituents for a grand total of \$2,703,229.00 saved! That is money that stays in our communities – not just the drug store – which doesn't get to keep a lot of it either!

**Savings details for 2017-2021 Counseling by Mary Loftis & Linda Bisanz:**

	Burt	Dodge	Washington	Other Counties	# Ind.	Total Yearly Savings
<b>2017*</b>	<b>\$268,140</b>	<b>\$60,145</b>	<b>\$15,913</b>		<b>596</b>	<b>\$344,198</b>
Mary	\$198,030	\$14,095	\$ 3,504		349	
Linda	\$ 70,110	\$ 7,299	\$ 1,426		144	

596 total contacts with 2 additional helpers at Open Enrollment events \$577/contact ave. saved.

**Mary approximate hours – 266 Linda approximate hours 129**

<b>2018*</b>	<b>\$197,731</b>	<b>\$74,444</b>	<b>\$40,468</b>	<b>\$23,465</b>	<b>588</b>	<b>\$344,000</b>
Mary	\$141,417	\$39,377	\$ 7,920	\$16,853	360	
Linda	\$ 56,314	\$10,077	\$27,411	\$5,767	187	

**Mary approximate hours – 264 Linda approximate hours 177**

588 total contacts with 2 additional helpers at Open Enrollment events \$585/contact ave. saved

<b>2019*</b>	<b>\$302,085</b>	<b>\$113,639</b>	<b>\$107,942</b>	<b>\$1,352</b>	<b>700</b>	<b>\$410,377</b>
Mary	\$111,215 241	\$78,819 56	\$61,513 51	\$825 17	365	
Linda	\$108,547 134	\$12,925 24	\$13,434 23	\$527 1	182	

**Mary approximate hours – 301 Linda approximate hours 189**

700 total contacts with 1 additional helper reporting yielding \$586/contact average saved

<b>2020</b>	<b>\$328,034</b>	<b>\$36,669</b>	<b>\$31,423</b>	<b>\$2,685</b>	<b>632</b>	<b>\$398,811</b>
Mary	\$265,595 289	\$28,156 64	\$27,168 51	\$ 1,270 19	426	
Linda	\$ 62,439 128	\$ 8,543 38	\$ 4,255 28	\$ 1,415 12	206	

**Mary approximate hours – 320 Linda approximate hours 187**

632 total contacts yielding \$631/contact average saved

COVID – Phone consultations during Open Enrollment. No additional helpers.

<b>2021</b>	<b>\$232,359</b>	<b>\$33,992</b>	<b>\$ 22,167</b>	<b>\$4,325</b>	<b>603</b>	<b>\$292,843</b>
Mary	\$179,081 275	\$23,271 56	\$ 14,420 49	\$1,729 21	401	
Linda	\$ 53,278 123	\$10,721 37	\$ 7,747 26	\$2,596 16	202	

**Mary approximate hours – 520 Linda approximate hours 212**

603 total contacts \$485/person average saved.

COVID precautions – Phone consultations mainly during Open Enrollment. No additional helpers.

\* Total savings were added to the county and yearly totals from the additional helpers at Open Enrollment events I coordinated, but I did not claim that savings. Thus the county totals don't always add up to what Linda and I saved our clients.

Just using last year's (2021) potential savings numbers:  
Burt County saved \$232,359  
Dodge County saved \$33,992  
Washington County saved \$22,167  
603 individual contacts had a total of over **\$292,843 saved. That is an average of \$485/person savings.**

If 5.5% of that 2021 total savings was spent on paying Mary and Linda to keep on doing what they have been doing including mileage while Mary was employed by UNL Extension in Burt County, the total amount spent would be about **\$16,106** for a full year for two part time employees.

Mary – Approximately 640 hours at \$18/hour = \$11,520

Linda – Approximately 212 hours at \$13/hour = \$ 2,756

\$14,276 plus mileage & meals when out of town

Anticipated mileage would include SHIP Trainings in Lincoln or Norfolk (2), New to Medicare Workshops presented in each county (3-4 total), in person Open Enrollment Events in Tekamah (13); Craig (1); Oakland (3-4); Lyons (3-4) and Decatur (3); Blair (4); Fremont (3); North Bend (1) and Hooper (1).

Burt County Extension budgeted for my Medicare work after my retirement through June 2022. There is \$6,000 already in the current budget, of which I expect to use about \$4,000 by the end of June.

My request is to continue my Medicare work through June at \$18/hour using the funds already budgeted through the Extension Office budget. I have support from Burt County Extension to maintain my office space and use of the computer I've been using, however I may need to purchase my own computer as my current Extension computer is out of warranty. Medicare funds have purchased two printers which I will use when traveling to other meeting spaces. Postage expenses will hopefully be less in future years if we are able to do in-person comparisons during Open Enrollment. There is still significant postage and printer paper from the SHIP grant UNL Extension received in the past.

For the July 2022-June 2023 budget to I'd like to request from the three counties a total of \$16,106. Using the 5½% of the **\$292,843** 2021 Medicare savings.

Burt County paying 70% or \$11,274

Dodge County paying 15% or \$2,416

Washington County paying 15% or \$2,416

I have strong support from the clients I have worked with in all three counties over the many years, so if you want any letters of support I'd be happy to ask for some.

I'll be happy to share additional background and answer any questions during your Board of Supervisors meeting this week.

Thank you for your time and consideration of this proposal.

Sincerely,

Mary Loftis (402-380-0093)

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