

Mary Loftis SHIP/SMP Medicare Education Impact June 2022-July 2023

2022-2023 Financial Impact by the numbers:

Mary Loftis	Clients	Savings
Burt County	193	\$74,941.92
Dodge County	76	\$38,274.31
Washington County	55	\$19,380.83
Out of County	29	\$10,933.90
Total	353	\$143,530.96

Linda Bisanz	Clients	Savings
Burt County	113	\$41,737.17
Dodge County	29	\$30,813.03
Washington County	28	\$ 6,114.36
Out of County	11	\$ 2,005.73
Total	181	\$80,670.29

Deb Hawkins	Clients	Savings
Burt County	63	\$ 36,982.46
Dodge County	18	\$ 5,959.00
Washington County	16	\$ 1,242.80
Out of County	6	\$ 763.60
Total	103	\$ 44,947.06

Total Savings/County:

	Clients	Savings
Burt County	409	\$153,661.55
Dodge County	123	\$ 75,046.34
Washington County	79	\$ 26,737.99
Out of County	46	\$ 13,703.23

2022 Grand Totals: 637 Clients Savings: \$269,149.11
Average Saving/Client \$422

New to Medicare Educational Sessions – 150 total attendees 2022-2023

- January 27, 2022 - Oakland – 21 attended.
 - April 7, 2022 – Blair – 11 attended.
 - June 23, 2023 – Fremont - 4:00 session- 5 attended and 7:00 session - 47 attended.
 - September 22, 2022 – Tekamah – 17 attended.
 - January 26, 2023 – Blair – 33 attended.
 - March 30, 2023 – Fremont – 4:00 session – 9 attended and 7:00 session – 7 attended – 16 total.
- *****
- June 22, 2023 – Next “New to Medicare” session planned in Oakland.

Mary Loftis Medicare Education Impact 6/2022-7/2023 and Funding Request for 2023-2024

Financial Support provided July 2022-June 2023:

Burt County	\$11,274
Dodge County	\$ 2,416
Washington County	\$ 2,416
NE SHIP Grant	\$ 2,400
TOTAL	\$18,506

Request for July 2023-June 2024:

I'm requesting the same amounts from the three counties as last year. I was pleased to have received a SHIP Grant from the state and it will be renewed for a second year. The grant made this current year much more comfortable financially for me!

With these funds I anticipate doing the Medicare education job in Burt, Dodge and Washington Counties even better with the same funding request for next year.

My capital expenditures should be down next year, although there are always supplies, updates and surprises with any equipment!

Plans for next year:

- Continued and improved media outreach – newspaper, radio, mailings to churches and senior centers and Facebook/online.
- Offering at least 34 Medicare Open Enrollment Event Days in the 3-county area (October 17-December 7) and seven New to Medicare Workshops throughout the year.
- Office hours once a week and my Medicare phone is available and responded to at all other times as soon as possible after a message is left.
- Stipend payments to extra SHIP Counselor and Open Enrollment Appointment Coordinator to keep their help coming, as well as an increase in pay to the full time/part time SHIP Counselor working with me throughout Medicare Open Enrollment.

Mary Loftis

Nebraska SHIP/SMP Counselor

402-380-0093

2390 County Road B

Craig, NE 68019

Contracted Position in Burt, Dodge & Washington Counties for Medicare Education & Counseling July 2023 - June 2024

This contract is between Mary Loftis, Nebraska SHIP/SMP Counselor and Burt, Dodge and Washington Counties to:

- Provide unbiased, focused counseling services to Medicare beneficiaries and interested parties on Medicare, Medicare Advantage and Part D enrollment topics. This will be accomplished through one-on-one counseling and public outreach events, media activities and presentations through the entire fiscal year.
- To offer education and counseling events in all counties — in person, by telephone and/or online.
- Provide counseling services to underserved and hard to reach populations (disabled, low-income, rural, homebound).
- Assist any volunteer or beneficiary regardless of age, race, color, disability, religion, sex or national origin.
- Work with the State Department of Insurance SHIP/SMP Office staff to achieve the mission of the counseling program and attend trainings given by the SHIP/SMP office and other meetings/trainings relevant to the program.
- Maintain an office in the Burt County Extension Office for counseling, telephone, copying and secretarial support.
- Collect counseling data and enter data on State STARS website: <https://stars.acl.gov> monthly.
- Employ Linda Bisanz as a part time employee during Medicare Open Enrollment (October 15-December 7) to extend the reach of the SHIP/SMP program in these counties. Give stipend support to Deb Hawkins and Debbie Saville for Medicare Open Enrollment help.

To accomplish these goals Burt, Dodge and Washington Counties will share my expenses with the following proportions:

Burt County: 70%	\$11,274.00 annually	Total county requested amount for July 2023-June 2024 is \$16,106.00.
Dodge County: 15%	\$ 2,416.00 annually	
Washington County: 15%	\$ 2,416.00 annually	

Total County contract request: \$16,106.00

Anticipated Expenses:

Mary Loftis - \$18/hour approximately 640 hours	\$11,520.00
Linda Bisanz - \$14/hour approximately 212 hours	2,968.00
Deb Hawkins – Stipend for Medicare help	500.00
Debbie Saville – Stipend for Medicare appointment work	500.00
Mileage: 3-4 "New to Medicare Programs" in 3 counties & approximately 34 Medicare Open Enrollment Events in 3 counties & SHIP/SMP training sessions	1697.39
Meals out of office, all SHIP helpers approx. 76 meals/\$9	684.00
Unallocated funds for equipment upkeep, postage, toner, miscellaneous expenses	<u>636.61</u>
TOTAL EXPENSES:	\$18,506.00

Requested Funding: Burt, Dodge & Washington Counties:	\$16,106.00
Programming Grant from NE SHIP/SMP Office:	<u>\$2,400.00</u>
	\$18,506.00

Burt, Dodge and Washington Counties will be billed every three months (September, December, March, and June) unless they choose to pay their portion on a different schedule (i.e., 6 months, full etc.)

Mary Loftis SHIP/SMP Counselor:

Burt County Supervisors by:

Chairman, Burt County Board

Dodge County Supervisors by:

Chairman, Dodge County Board

Washington County Supervisors by:

Chairman, Washington County Board