

# NEW DIRECTOR TRAINING

February 21–22, 2024 | Washington, DC

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## Typical Day of a Director: Sub-grantees, Contractors, Volunteers, and Community Partnerships

Melinda Munden, North Carolina SHIP

Kevin Robertson, North Carolina SMP

Ray Walker, Oklahoma SHIP and SMP

# North Carolina SHIP

- Founded in 1986 by the Department of Insurance and was one of the first SHIP's in the country.
- Commissioner of Insurance is elected every four years.
  - Part of the NC Council of State and does not fall under the authority of the Governor.
- SHIP is a Division within the NCDOI and NCSMP in housed within SHIP.
  - Also administer MIPPA Priority Areas 1, 2, and 3
- Receive some state appropriations – majority of funding comings from ACL-OHIC federal grants.

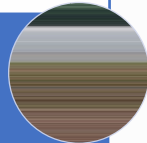
# NC SHIIP- Staff

- SHIIP – 26 full-time employees and one part-time employee, 15 are funded by federal grants and 11 are funded through state appropriated funds.
  - Salary % are allocated based on work performed for each grant.
  - Staff is trained on all grant objectives – our motto is “You can’t do one without the others.”
- SHIIP Director, SMP Director, Regional Managers, Senior Technical Advisor, Project Manager, Program Specialists, Complaint Analysts, Communication Specialists, etc.

# NC SHIP Structure

- Housed within human service agencies
- At least one site in each of NC's 100 counties
- Receive SHIP Base grant dollars to support SHIIP locally – formula based
- Most sites accept MIPPA Priority 1 – formula based

Local SHIIP  
Coordinating  
Sites



- Appointed by the local agency
- SHIIP/SMP certified
- Manage volunteer network within the county
- Manage SHIIP at local level

Certified SHIIP  
Coordinator



- Complete SHIP TA online training
- Additional state-specific trainings SMP, LTC, STARS, shadowing
- Volunteers are certified for SHIIP and SMP
- Nearly 700
- Direct-entry in STARS

Certified SHIIP  
Volunteer



- 1.5 Program Specialists support 50% of the state
- 2 Communication Specialists handle complex cases
- STARS crossover to SIRS

NC SMP



- 9 of 16 Area Agencies on Aging – fraud outreach
- Identity Theft/Shed-a-Thon Events – local coordinating sites

Sub-grantee



# NC SHIP- Subgrantee Requirements

- Statement of Work for each grant requires targeted outreach, advertising, direct counseling, application assistance, and STARS reporting.
- Goals based on total county population and Medicare beneficiary population for SHIP Base Grant.
- Goals based on total county population, Medicare beneficiary population, and LIS potentially-eligible for MIPPA Priority Area 1 only.
- NC SHIP serves as the pass through for Priority Areas 2 & 3 at the request of NCDHHS, and they provide the funding formula.
- Mid-Year and End-of-Year PPRs and FFRs.

# Consumer Publications

If you have to choose between buying groceries or paying your Medicare costs... SHIP may be able to help.



855-408-1212

www.ncship.com



Extra Help and Medicare Savings Programs are available for those who qualify, but you have to apply. For more information, contact the NC Seniors' Health Insurance Information Program.

...helps pay for insurance.

No Part B Deductible

The Lowest Part D Outlays

If you qualify for Medicare Savings Program or get Extra Help, you'll also be able to make changes to your coverage one time during each of these quarters:

January 1 – March 31

April 1 – June 30

July 1 – September 30

If you make a change during one of these quarters, it will take effect on the first day of the following month. You'll have to wait for the next quarter to make another change. You can't use this Special Enrollment Period from October 1 – December 31, however, all people with Medicare can make changes to their coverage from October 15 – December 7, and the change will take effect on January 1.

Eligibility guidelines for Extra Help are based on income and assets, and they change from year to year.

## MEDICARE SAVINGS PROGRAMS

The Medicare Savings Programs (MSP) help qualified Medicare beneficiaries pay for their Medicare Part A and Part B health-care costs, such as premiums, deductibles, and coinsurance. There are various levels of assistance through Medicare Savings Programs. Even if you don't qualify for full Medicaid, you might be eligible for coverage of some of your medical expenses.

Eligibility guidelines are based on income and assets, and they change from year to year.

If you newly become eligible for, lose, or have a change in your Medicaid or Extra Help status, you will qualify for a Special Enrollment Period to change plans.

Produced with financial assistance in whole or in part, through a grant from the Administration for Community Living. 20160215 10001



Ms. Lee was almost a victim of fraud...

Ms. Lee has Medicare. She wanted to understand a phone call from a woman who identified herself as a Medicare representative. The woman on the phone advised Ms. Lee that she had hundreds of dollars each month by signing her up for the new Medicare Prescription Drug Coverage. Ms. Lee was over \$400 a month each month, so she was eager to join. When the woman said she could sign her up over the phone and asked for Ms. Lee's Medicare and checking account numbers, she began to feel uneasy. After hanging up, Ms. Lee realized she had made a mistake by giving out her personal information and contacted her SHIP. The SHIP helped Ms. Lee contact her bank to close her account and contacted the police and Medicare.

...thanks to his SHIP, he was not.



Don't be a target of healthcare fraud.

### Protect Detect Report

**Protect yourself from Medicare errors, fraud and abuse.** Learn to detect potential errors, fraud and abuse. If you suspect you have been a target of errors, fraud or abuse, report it.

**Empowering actions to healthcare fraud.** Protect yourself from Medicare errors, fraud and abuse. Learn to detect potential errors, fraud and abuse. If you suspect you have been a target of errors, fraud or abuse, report it.

**NC Senior Medicare Patrol (SMP)**  
NC DEPARTMENT OF INSURANCE  
MIKE CAUSEY, COMMISSIONER  
1-855-408-1212 • www.ncship.com

**NORTH CAROLINA SUPPORTING SENIORS PREVENT HEALTHCARE FRAUD**

Protecting your personal information is the best line of defense in the fight against healthcare fraud and abuse. Every day, scammer target off-the-wall artists. Medicare and Medicaid fraud billions of dollars each year. You can make a difference.

Here are some steps to take on when you're protecting your healthcare benefits:

1. Treat your Medicare, Medicaid and Social Security numbers like a credit card number. Never give these numbers to a stranger.
2. Never give Medicare benefits to a stranger or to a company.
3. Don't authorize Medicare or Medicaid health care services without it. Only take it to doctor's appointments, only to your hospital or clinic, or to the doctor's office.
4. Second doctor visits, tests and procedures in your personal health care journal or calendar.
5. Use Medicare Advantage, Medicare and Part D health care services. Study the documents when they are no longer useful.

Over when you do everything right, there is a chance that you will be a target of healthcare fraud. There are a lot of things that you can do to protect your information. Medicare and Medicaid fraud billions of dollars each year. You can make a difference.

Here are some steps to take on when you're protecting your healthcare benefits:

1. Always verify your Medicare Summary Notice (MSN) and Part D Explanation of Benefits (EOB) for mistakes. Report to get correct Medicare account to establish if benefits are being paid.
2. Compare your MSN and EOB to your personal health care journal and prescription drug receipt to make sure they are correct.
3. Look for these things on your billing statements:
  - Changes for something you didn't get
  - Billing for the same thing more than once
  - Services that were not ordered by your doctor

If you have questions about information on your Medicare Summary Notice or Part D Explanation of Benefits, call your provider or plan.

If you are not comfortable calling your provider or plan or you are not satisfied with the response you get, call the North Carolina Senior Medicare Patrol Program (SMP) at 1-855-408-1212. All communications are confidential.

Here are the steps you should take to report your concerns and abuse:

1. If you have questions about information on your Medicare Summary Notice or Part D Explanation of Benefits, call your provider or plan.
2. If you are not comfortable calling your provider or plan or you are not satisfied with the response you get, call the North Carolina Senior Medicare Patrol Program (SMP) at 1-855-408-1212. All communications are confidential.

SHIP is a division of the Seniors' Health Insurance Information Program (SHIP) at the North Carolina Department of Insurance.

## Medicare questions? SHIP CAN HELP.

Call 855-408-1212 or visit ncship.com for free unbiased information.

SHIP (Seniors' Health Insurance Information Program) is a division within the N.C. Department of Insurance. Our experts can assist you with:

- Original Medicare (Parts A and B)
- Medicare Supplements
- Medicare Advantage (Part C)
- Medicare Prescription Drug Plans (Part D)
- Medicare Fraud and Abuse
- Long Term Care Insurance
- Medicare due to disability

SHIP counselors are not financial insurance agents, and they do not sell, endorse, or compare any product, plan, or company. If you have questions about your specific situation, we encourage you to contact your insurance agent or the insurance company.

NC DEPARTMENT OF INSURANCE  
SENIORS' HEALTH INSURANCE INFORMATION PROGRAM  
MIKE CAUSEY, COMMISSIONER

SHIP  
Seniors' Health Insurance Information Program

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Extra Help is a program to assist Medicare beneficiaries with limited income and assets. Call SHIP to apply.

★ Medicare Open Enrollment Period runs Oct. 15 – Dec. 7.



### The Road to Medicare: Planning Your Drive Toward 65

Seniors' Health Insurance Information Program  
North Carolina Department of Insurance  
Mike Causey, Commissioner  
855-408-1212 • www.ncship.com

It's never too early for everyone becoming eligible for Medicare to get accurate information about coverage and delivery options, including supplemental health insurance, Medicaid health plans and prescription drug coverage. Attention to these issues will help you avoid serious and costly problems later. This fact sheet will help you map your journey to Medicare highlighting roadblocks and warning signs along the way.

Some road signs you need to watch out for are:

- **Caution: Slippery Road Ahead** — Watch for potholes for Medicare
- **Slow Right-of-Way** — When and how you need to enroll in Medicare
- **Don't Take the Wrong Turn** — Information for beneficiaries who plan to work beyond age 65
- **Watch for Supplemental Coverage** — Choices in health insurance to supplement Medicare
- **Watch for Speed Bumps** — Information for further information and assistance on the road to Medicare

The Seniors' Health Insurance Information Program (SHIP), a division of the North Carolina Department of Insurance, is available for additional guidance and information at any turn of the road. Contact SHIP at 855-408-1212 or ncship@ncdip.com. Trained SHIP volunteer counselors are also available in every county in North Carolina to help with your specific situation. The SHIP Web site, www.ncship.com, also provides information and information to assist you.

### Caution: Slippery Road Ahead

Seven months before enrolling in Medicare you should begin to learn more about Medicare and how it relates to your current situation. For example:

- If you're 60, you should have used the Social Security benefits for 20 or more years, you are eligible for premium-free Medicare Part B Original Insurance at age 65. If you have not worked enough to qualify for Social Security benefits, you may have to pay a premium for Medicare Part B (Medicare Insurance).
- If you have been on Medicare due to disability, you have a brand new six-month Open Enrollment Period for purchasing Medicare supplemental insurance when you turn 65.
- Talk to your employer's benefits office and ask for any information about company health insurance after age 65. If you're in an employer group health plan that you've continued to carry voluntarily after you become eligible for Medicare, study the benefits booklet to find out the cost and benefits of the plan. You will then need to decide if you should keep your SHIP as secondary Medicare or if you need to drop your SHIP and purchase a Medicare supplement or join a Medicare Advantage plan. If your SHIP has drug benefits, make sure they are as good as or better than Medicare's offer it.
- If you will not be covered by an SHIP plan that will be secondary to Medicare, begin to investigate other health insurance options to either an individual Medicare supplement policy (Medigap) or a Medicare Advantage plan. SHIP can provide information about the Medicare supplement plans, Medicare Advantage (Medicare Part C) plans and Medicare Prescription Drug Plan (Medicare Part D) options available in North Carolina.



Medicare Part A and Part B benefits and possibly some extra benefits. Members may be required to either an individual or group of preferred providers. Check with your health care provider to see if they accept the insurance plan you are considering. All plan options may not be available in the county or where you live. If you join a Medicare Advantage plan, you are still in the Medicare program but you receive your Medicare benefits from the private carrier. You are no longer enrolled in Original Medicare. Information about Medicare Advantage plans in North Carolina is available from SHIP 855-408-1212 or www.ncship.com. You may enroll in a Medicare Advantage plan during your initial Enrollment Period (see page 2) during the Medicare Open Enrollment Period from Oct. 15 through Dec. 7, or the New Medicare Advantage Open Enrollment Period from Jan. 1 through Mar. 31.

### Stop: To Get Help

Seniors' Health Insurance Information Program (SHIP)  
855-408-1212 or www.ncship.com  
NC Department of Insurance

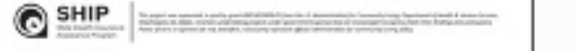
SHIP counselors are not financial insurance agents, and they do not sell, endorse, or compare any product, plan, or company. If you have questions about your specific situation, we encourage you to contact your insurance agent or the insurance company.

The Seniors' Health Insurance Information Program (SHIP), a division of the NC Department of Insurance, offers free, unbiased information about Medicare, Medicare Advantage plans, Medicare claims, Medicare supplement insurance, Medicare Prescription Drug Plans, fraud and abuse prevention and long-term care insurance. Trained SHIP volunteer counselors are available for one-on-one counseling in every county in the state.

Medicare • 800-635-6222 or www.medicare.gov  
Medicare provider information 24 hours a day, seven days a week about eligibility, enrollment and coverage.  
Social Security Administration • 800-772-1213 or www.socialsecurity.gov  
Contact the Social Security Administration to enroll in Medicare or to request a replacement Medicare card.

Employer Benefits Representative  
See your representative for information about Employer Group Health Plan coverage.  
Your local Department of Social Services (DSS)  
County DSS offices have information about Medicaid, Extra Help and Medicare Savings Program eligibility and enrollment.

Financial Life • 877-834-4447 (800-444-7447) or www.fincorp.com  
TRICARE for life representatives can also assist retirees with questions on eligibility and coverage.



# Key Community Partnerships

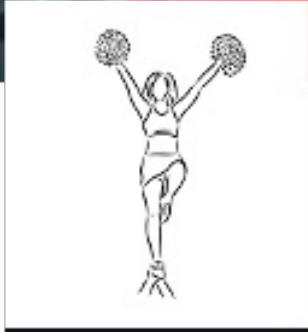
- NC Division of Aging and Adult Services
- NC General Assembly
- Other State Agencies
- Area Agencies on Aging
- NC Community Health Center Association
- NC Rural Health Association
- NC State Senior Games
- Meals on Wheels
- Eastern Band of Cherokee Indians
- Carolina Aging Alliance – SAGE
- AARP North Carolina
- NC Coalition on Aging
- Governors Advisory Council on Aging
- Senior TarHeel Legislature
- Partnership to Address Adult Abuse
- NC Retired Government Employees Association
- Food Banks
- NC MedAssist
- Social Security Administration
- NC PACE Association
- Community Health Worker Association

# Hang in There! Help is Available.

- Review the grant application submitted by your agency.
- Review your NGA.
- Lean on your ACL Project Officer.
- SHIP Director Steering Committee.
- Fellow State Directors.
- SHIP TA Center, SMP Resource Center, and NCOA have fantastic resources.
- Keep fostering those relationships.



# Typical Day = Atypical Day



# Medicare Assistance Program (MAP) at the Oklahoma Insurance Department (OID)

- Includes the SHIP, SMP, and MIPPA Priority 1
- Insurance Commissioner is elected for four-year terms (two-term max)
- OID is a non-appropriated agency (We get no money from the State)
- MAP gets no funding from other resources, including the State

# Staff Employed through OID

MAP Employees- 5 FTEs (four in OKC and 1 in Tulsa)

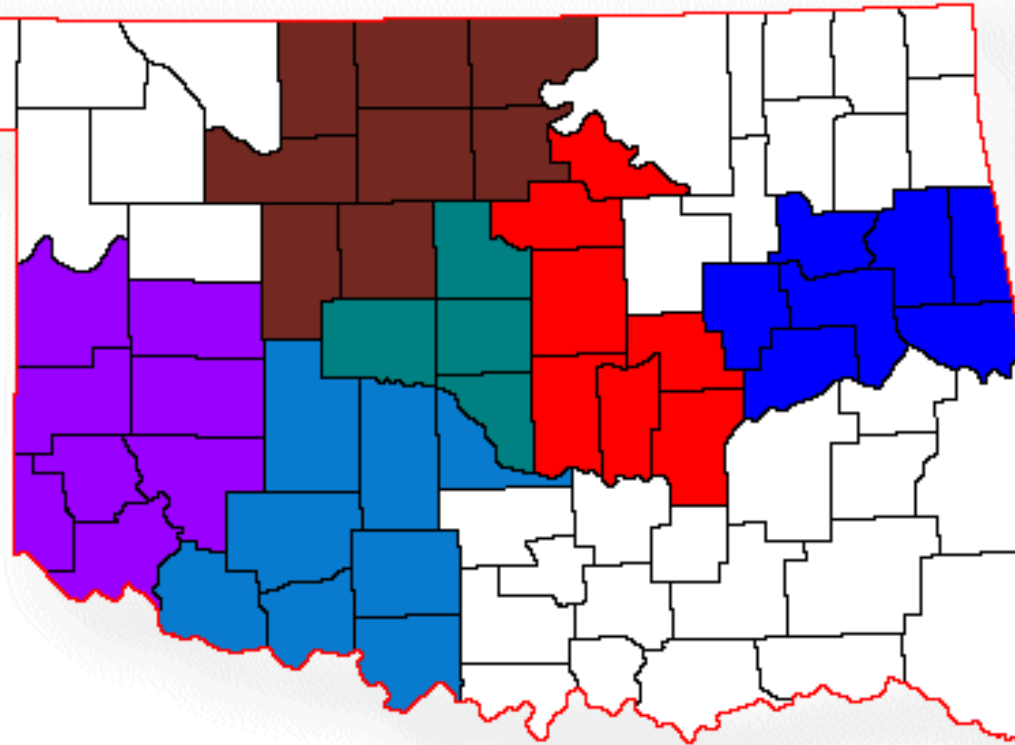
- Everyone works on every grant program, but have other additional duties:
  - Coordinator of Volunteers
  - Outreach Coordinator
  - Grants and Contracting Coordinator
  - Hispanic Outreach

# Contracted Agencies

- Contracted with a call center to provide back-up to main phone line
- Contracted with other agencies across the state to provide services in their given service areas (existing service areas for other programs).
  - 9 Area Agencies on Aging
  - 3 Community Action Agencies
  - 1 Private Non-profit Agency

## MAP Contracted Agency Map 1

- - Areawide AAA
- - LTCRE AAA
- - ASCOG AAA
- - COEDD AAA
- - EODD AAA
- - SWODA AAA



Source: diymaps.net (c)

● - Grand Gateway AAA

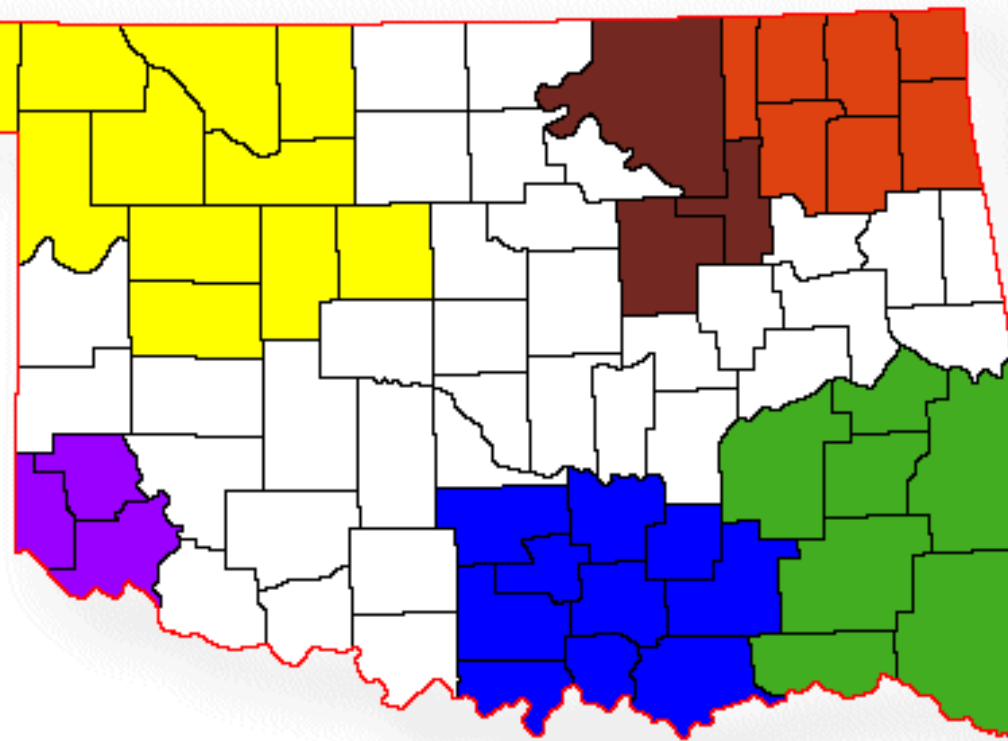
● - KEDDO AAA

● - SODA AAA

● - Opportunities Inc

● - LIFE Senior Services

● - SOCAG



Source: diymaps.net (c)

# In-Kind Counselors

- Woodward Senior Center
- RSVP of Kay County
- Panhandle Counseling and Health Center
- Washington County ElderCare
- Tribes/IHS Facilities

# Networking is Critical!

- State Council on Aging
  - Oklahoma Human Services
    - Oklahoma Caregiver Coalition
  - OK Health Care Authority
  - Dept of Mental Health & Substance Abuse Services
    - Oklahoma Mental Health and Aging Coalition
  - Silver Haired Legislature
    - Oklahoma Aging Alliance
  - Adult Protective Service
  - AARP
- Oklahoma Senior Fraud Conferences
  - Attorney General's Office
  - Department of Securities
  - Oklahoma Bankers Association
    - MAFIA/CAFEE
  - Oklahoma County Sheriff's Office
    - TRIAD/SALT
    - FBI
      - DOJ
  - Vo-Tech Centers
  - AARP



# What's Working for Oklahoma

- Heartline, Inc- Call Center that acts as backup to our 800 number
- Jones PR- Handles media, social media, interviews, etc
- Monthly Meetings with Comptroller to review and adjust budgets
  - Budget cycles, unexpected expenses, salary adjustments, etc.
- OID Communications Department- Manage website, coordinate webinars and other education events at OID.

Partial Award		SHIP Grant #	90SAPG0086-04-00																	remaining	3.00	
Project Period		Budget Period:	04/01/2023 to 03/31/2024																	passed	9.00	
3/31/2025		Grant Award:	\$777,237.00																			
		OP Unit	20010																			
			Sub 24	Expenditures																		
Account Codes	Budget Category	Budget Line item	Budget Amount	April Sub24	May Sub24	June Sub24	July Sub24	August Sub24	September Sub24	October Sub24	November Sub24	December Sub24	January Sub24	February Sub24	March Sub24	April Sub24	May Sub24	June Sub24	Year to Date Expenditures	Balance	Outstanding Enc	Balance Remaining after Enc
521522		Out-of-State	4,033.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	415.66	0.00							415.66	3,617.34	-	3,617.34
		<b>Total Travel</b>	<b>7,923.00</b>	<b>10.34</b>	<b>0.00</b>	<b>96.75</b>	<b>114.00</b>	<b>2,396.23</b>	<b>290.00</b>	<b>466.48</b>	<b>421.29</b>	<b>(14.90)</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>3,780.19</b>	<b>4,142.81</b>	<b>50.00</b>	<b>4,092.81</b>
	<b>Equipment</b>	None	0.00																0.00	0.00	-	-
		<b>Total Equipment</b>	<b>0.00</b>													<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>-</b>	<b>-</b>
536130/536140/536150/531150	<b>Supplies</b>	General Office Supplies	11,000.00	0.00	6.13	99.18	0.00	39.99	70.44	0.00	0.00	270.92							486.66	10,513.34	-	10,513.34
		<b>Total Supplies</b>	<b>11,000.00</b>	<b>0.00</b>	<b>6.13</b>	<b>99.18</b>	<b>0.00</b>	<b>39.99</b>	<b>70.44</b>	<b>0.00</b>	<b>0.00</b>	<b>270.92</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>486.66</b>	<b>10,513.34</b>	<b>-</b>	<b>10,513.34</b>
	<b>Contractual</b>	<b>Printing</b>																				
531150		OK Medicare Supp Shoppers Guide	3,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00								0.00	3,000.00	6,695.00	(3,695.00)
531150		MAP Brochures	2,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	305.00							305.00	1,695.00	-	1,695.00
531150		CMS, Social Security & other Counselor Training	2,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00								0.00	2,000.00	-	2,000.00
		<b>Call Center</b>																				
515600		HeartLine, Inc	82,500.00	0.00	0.00	13,750.00	0.00	13,750.00	6,875.00	6,875.00	0.00	13,750.00							55,000.00	27,500.00	27,500.00	-
		<b>Grant Partners</b>																				
515660		Areawide Aging Agency (AAA)	25,000.00	0.00	2,083.00	0.00	4,166.00	2,083.00	2,083.00	2,083.00	0.00	4,166.00							16,664.00	8,336.00	8,332.00	4.00
515660		Association of South Central Oklahoma Governments (ASCOG)	25,000.00	0.00	2,083.00	2,083.00		4,166.00	2,083.00	2,083.00	2,083.00	2,083.00							16,664.00	8,336.00	8,332.00	4.00
515660		Central Oklahoma Economic Development District (COEDD)	25,000.00	0.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00							16,664.00	8,336.00	8,332.00	4.00
515660		Eastern Oklahoma Development District (EODD)	25,000.00	0.00	0.00	2,083.00	4,166.00	0.00	4,166.00	0.00	4,166.00	0.00							14,581.00	10,419.00	10,415.00	4.00
515660		Grand Gateway Economic Development Association (Grand Gateway)	25,000.00	0.00	2,087.00	2,087.00	2,075.00	2,083.00	2,083.00	0.00	0.00	6,249.00							16,664.00	8,336.00	8,332.00	4.00
515660		Kiamichi Economic Development District of Oklahoma (KEDDD)	25,000.00	0.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00	0.00	2,083.00	4,166.00							16,664.00	8,336.00	8,332.00	4.00
515660		LIFE Senior Services, Inc. (LIFE)	63,000.00	0.00	5,250.00	5,250.00	5,250.00	5,250.00	5,250.00	5,250.00	5,250.00	5,250.00							42,000.00	21,000.00	21,000.00	-
515660		Long Term Care Authority of Enid (LTCAE)	25,000.00	0.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00							16,664.00	8,336.00	8,332.00	4.00
515660		Opportunities, Inc. (Opportunities)	25,000.00	0.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00							16,664.00	8,336.00	8,332.00	4.00
515660		Southern Oklahoma Development Association (SODA)	25,000.00	0.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00	0.00	2,083.00							14,581.00	10,419.00	10,415.00	4.00
515660		South Western Oklahoma Development Authority (SWODA)	25,000.00	0.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00	2,083.00							16,664.00	8,336.00	8,332.00	4.00
		<b>Total Contractual</b>	<b>402,500.00</b>	<b>0.00</b>	<b>24,001.00</b>	<b>37,751.00</b>	<b>28,155.00</b>	<b>39,830.00</b>	<b>35,038.00</b>	<b>26,706.00</b>	<b>21,914.00</b>	<b>46,384.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>259,779.00</b>	<b>142,721.00</b>	<b>142,681.00</b>	<b>40.00</b>
	<b>Other</b>																					
531130/515370/515380		Telecommunications/Internet Services	11,002.20	0.00	1,553.24	1,551.42	5,343.84	0.00	340.50	187.27	187.99	189.04							9,353.30	1,648.90	1,650.00	(1.10)
531130/541230		Cell Phones (5 phones)/Hotspots/Mifi	2,739.00	0.00	0.00	0.00	549.15	715.60	0.00	0.00	0.00	0.00							1,264.75	1,474.25	-	1,474.25
531130/541230		Cell Phones (5 phones)/Hotspots/Mifi	2,739.00	0.00	0.00	0.00	549.15	715.60	0.00	0.00	0.00	0.00							2,070.00	674.00	-	674.00

Business Unit	Fund	Department	Bud Ref	Claim #	Account	ACCT	Sub-Account	CFDA#	Vendor Name	Supplier	PO ID	Date	Close Status	Amount	Beginning Business Unit	Ending Business Unit	From Date
38500	41000	2000001	24	00035064	515060	515	24	933240000	EIDE BAILLY LLP	0000245426	3859005352	12/14/2023	O	\$ 1,988.25	38500	38500	12/1/2023
38500	41000	2000001	24	00035130	515660	515	24	933240000	GRAND GATEWAY ECONOMIC DEVELOPMENT ASSOC	0000056649	3859005623	12/21/2023	O	\$ 2,083.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035128	515660	515	24	933240000	GRAND GATEWAY ECONOMIC DEVELOPMENT ASSOC	0000056649	3859005623	12/21/2023	O	\$ 2,083.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035126	515660	515	24	933240000	GRAND GATEWAY ECONOMIC DEVELOPMENT ASSOC	0000056649	3859005623	12/21/2023	O	\$ 2,083.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035123	515660	515	24	933240000	AREAWIDE AGING AGENCY INC	0000073126	3859005619	12/21/2023	O	\$ 2,083.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035106	515660	515	24	933240000	KEDDO	0000072713	3859005627	12/19/2023	O	\$ 2,083.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035102	515660	515	24	933240000	ASSOCIATION OF SOUTH CENTRAL OKLAHOMA GO	0000056786	3859005622	12/19/2023	O	\$ 2,083.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035100	515660	515	24	933240000	CENTRAL OKLAHOMA ECONOMIC DEV DIST	0000072700	3859005620	12/19/2023	O	\$ 2,083.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035087	515660	515	24	933240000	SOUTHWESTERN OKLAHOMA DEVELOPMENT AUTHOF	0000072969	3859005629	12/15/2023	O	\$ 2,083.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035084	515660	515	24	933240000	OPPORTUNITIES INC	0000056597	3859005626	12/15/2023	O	\$ 2,083.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035079	515660	515	24	933240000	LONG TERM CARE AUTHORITY ENID	0000183155	3859005630	12/15/2023	O	\$ 2,083.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035029	515660	515	24	933240000	HEARTLINE INC	0000056882	3859005624	12/7/2023	O	\$ 6,875.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035026	515660	515	24	933240000	HEARTLINE INC	0000056882	3859005624	12/7/2023	O	\$ 6,875.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035022	515660	515	24	933240000	LIFE SENIOR SERVICES INC	0000057479	3859005625	12/7/2023	O	\$ 5,250.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035021	515660	515	24	933240000	SOUTHERN OK DEVELOPMENT ASSOCIATION	0000072697	3859005628	12/7/2023	O	\$ 2,083.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035018	515660	515	24	933240000	AREAWIDE AGING AGENCY INC	0000073126	3859005619	12/7/2023	O	\$ 2,083.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035014	515660	515	24	933240000	KEDDO	0000072713	3859005627	12/7/2023	O	\$ 2,083.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035076	522113	522	24	933240000	OFFICE OF MANAGEMENT & ENTERPRISE SVCS	0000000090	3859005665	12/21/2023	O	\$ 4.95	38500	38500	12/1/2023
38500	41000	2000001	24	00035033	522150	522	24	933240000	AUTHORITY ORDER-PCARD	0000001101	3859005670	12/8/2023	O	\$ (14.90)	38500	38500	12/1/2023
38500	41000	2000001	24	00035033	531130	531	24	933240000	AUTHORITY ORDER-PCARD	0000001101	3859005658	12/8/2023	O	\$ 189.04	38500	38500	12/1/2023
38500	41000	2000001	24	00034996	531150	531	24	933240000	OFFICE OF MANAGEMENT & ENTERPRISE SVCS	0000000090	3859005703	12/7/2023	O	\$ 305.00	38500	38500	12/1/2023
38500	41000	2000001	24	00035076	532142	532	24	933240000	OFFICE OF MANAGEMENT & ENTERPRISE SVCS	0000000090	3859005665	12/21/2023	O	\$ 455.95	38500	38500	12/1/2023
38500	41000	2000001	24	00034975	532142	532	24	933240000	OFFICE OF MANAGEMENT & ENTERPRISE SVCS	0000000090	3859005665	12/7/2023	O	\$ 455.95	38500	38500	12/1/2023
38500	41000	2000001	24	00035033	532160	532	24	933240000	AUTHORITY ORDER-PCARD	0000001101	3859005658	12/8/2023	O	\$ 770.67	38500	38500	12/1/2023
38500	41000	2000001	24	00034975	534290	534	24	933240000	OFFICE OF MANAGEMENT & ENTERPRISE SVCS	0000000090	3859005665	12/7/2023	O	\$ 38.41	38500	38500	12/1/2023
38500	41000	2000001	24	00035076	534310	534	24	933240000	OFFICE OF MANAGEMENT & ENTERPRISE SVCS	0000000090	3859005665	12/21/2023	O	\$ 12.66	38500	38500	12/1/2023
38500	41000	2000001	24	00035033	536140	536	24	933240000	AUTHORITY ORDER-PCARD	0000001101	3859005670	12/8/2023	O	\$ 220.73	38500	38500	12/1/2023
38500	41000	2000001	24	00035033	536150	536	24	933240000	AUTHORITY ORDER-PCARD	0000001101	3859005670	12/8/2023	O	\$ 50.19	38500	38500	12/1/2023
														\$ 50,555.90			

As Of Date	Bus Unit	Class Fund	Dept ID	Bud Re	PO No	PO Lin	Sched No	Dist Line	PO Date	Account	ACCT	CFDA No	Contract ID	Amount Remaining	Vendor ID	Vendor Name	HDC Flag
12/31/2023	38500	41000	2000001	24	3.859E+09	2	1	1	6/29/2023	515610	515	933240000		\$ 177.87		90 OFFICE OF MANAGEME N	
12/31/2023	38500	41000	2000001	24	3.859E+09	1	1	2	4/20/2023	515660	515	933240000		\$ 8,332.00		183155 LONG TERM CARE AUTH N	
12/31/2023	38500	41000	2000001	24	3.859E+09	1	1	2	4/20/2023	515660	515	933240000		\$ 8,332.00		72969 SOUTHWESTERN OKLAH N	
12/31/2023	38500	41000	2000001	24	3.859E+09	1	1	2	4/20/2023	515660	515	933240000		\$ 10,415.00		72697 SOUTHERN OK DEVELOP N	
12/31/2023	38500	41000	2000001	24	3.859E+09	1	1	2	4/20/2023	515660	515	933240000		\$ 8,332.00		72713 KEDDO	N

# A Great Partnership



# Key Services

- Campaign Management
- Social Media Management
- Media Outreach
- Creative Content Development
- Performance Analysis and Reporting



# What's Working for Oklahoma

- PDEO- working to review records on a monthly basis, rather than twice a year.
  - Practice makes almost perfect
- Regular communications with contracted and non-contracted partners
  - Sharing emails from ACL and CMS
  - Articles
- Participate in the community!
  - Represent at events, either directly or through a partner

# In Summary...

- “I could get hit by a bus.”
  - Know your team- their strengths, weaknesses, and interests
  - Document roles and expectations, including timelines
- “Ready, Fire, Aim!”
  - Set/understand the goals of your program. What will success look like?
  - Discuss what has and has not worked in the past
  - Don’t be afraid to be creative/innovative! We also learn when we fail.

# Summary

- “It’s a budget, not a magic purse”
  - Know the people who handle your budget/finances/processes/etc.
  - Develop a strong knowledge of those processes, including approval of expenditures
  - Make sure there’s a cooperative process in place for creating budget narratives, approvals, reviewing budgets on a regular basis, etc.
- Where’d they go?
  - Communicate regularly with partners! They tend to disappear!
  - Establish new relationships and follow the old ones to their new positions.