

NEW DIRECTOR TRAINING

February 21–22, 2024 | Washington, DC

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KY SHIP History

- Kentucky SHIP began in 1988.
- KY SHIP is a part of the KY Department for Aging and Independent Living (DAIL) – in the Division of Quality Living
- Offer contracts to all 15 Area Agencies on Aging throughout the state.
- 5 AAAs sub-contact their SHIP services with Legal Aid.

KY SHIP State Staff

- 6 State Employees:
 - Frankfort: SHIP Director,
 - 1 Call Center Supervisor
 - 4 Call Center Staff
- 15 AAA Coordinators:
 - 114 Volunteers

KY SHIP Staff

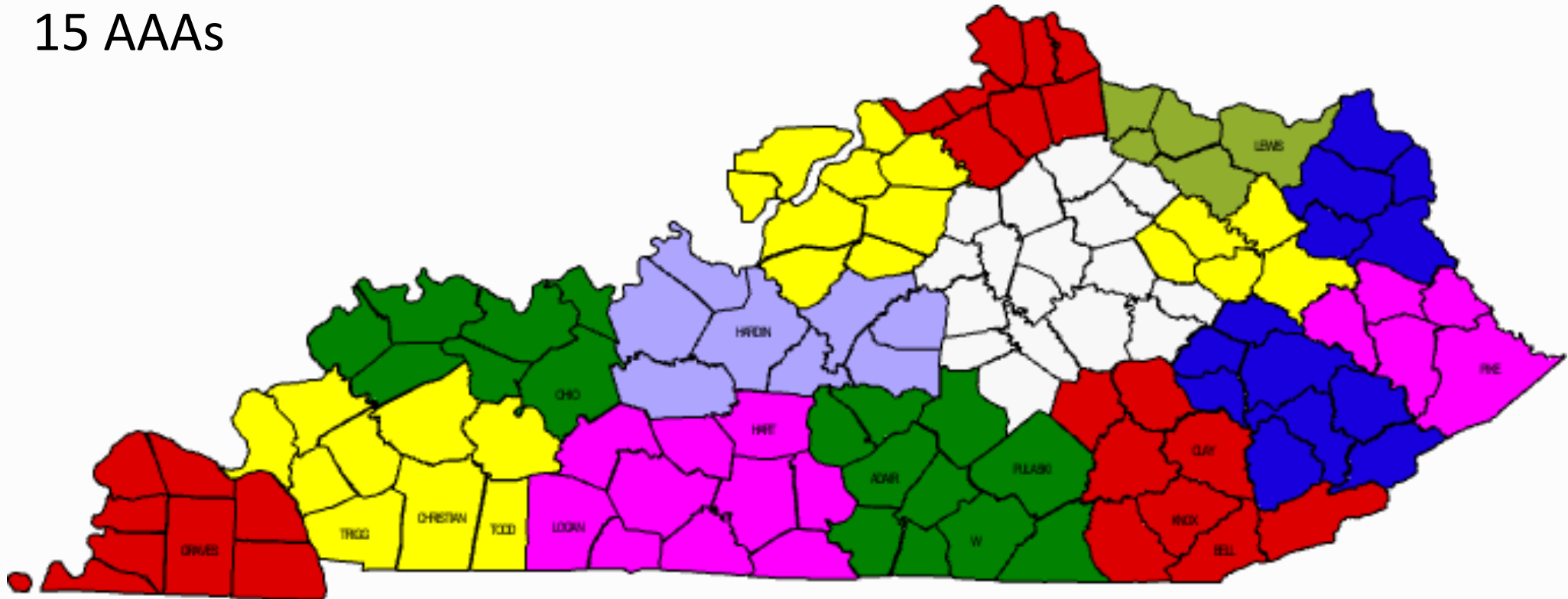
- Director – oversees all training, outreach, grants, policies, casework, SHIP Coordinators and Counselor activities/inquiries, federal reports, VRPM, TA Center, volunteer database and volunteer record management.
- Supervisor – oversees the daily operations of the call center.
- Coordinators – oversees the day-to-day counseling in their region, conducts trainings for their volunteer staff, and submits monthly reports to state staff.

KY Volunteer Network

- Each AAA has a SHIP Coordinator who is an employee of the AAA.
- There are 114 Volunteers who work through our 15 AAAs.

KY SHIP Map

- 15 AAAs



KY SHIP – A Day In My Life

- Phone calls to the call center = 100+ DAILY!
- Contact with volunteers – DAILY!
- Contact with beneficiaries – DAILY!
- Meetings with partners – DAILY!
- Work pertaining to grants – DAILY!
- Times I delegate tasks – DAILY!
- Years I've worked with Medicare = 16
- Years as a SHIP Director = 9

KY SHIP

- And last but not least.....IF YOU WANT YOUR PROVIDER(s) TO DO SOMETHING, PUT IT IN YOUR CONTRACT OR THEY WILL NOT DO IT!

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A day in the life of directing

MISSOURI SHIP
State Health Insurance Assistance Program

Scott Miniea, Executive Director – MO SHIP & MO Connections for Health
sminiea@moconnectionsforhealth.org – www.missouriship.org

Missouri SHIP - History

- MO SHIP began in 1993
- MO SHIP is a program of the MO Department of Commerce & Insurance
- MO contracts with Missouri Connections for Health (an independent nonprofit organization) to operate the program--since 1993
- MO SHIP (sub?)subcontracts close to 1/3 of its budget to 18-20 other organizations throughout the state (AAAs, CILs, others) and has MOUs with ~175 Community Partner organizations in all (most w/o \$).

Missouri SHIP - Staff

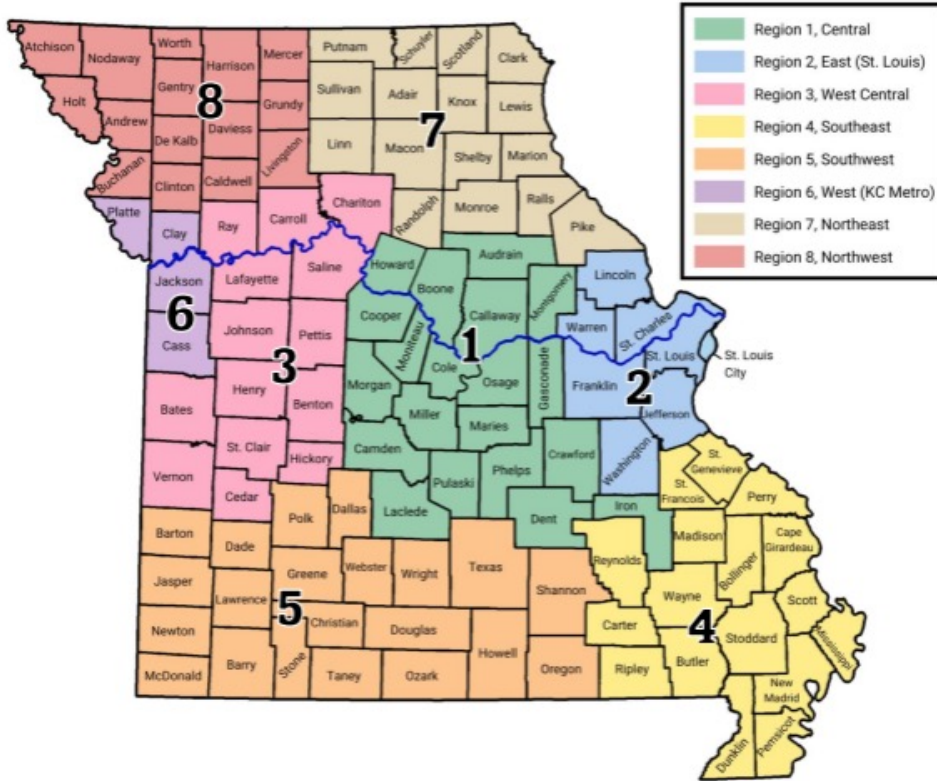
- 0 State Employees (Oversight by Dir. of Admin. at MO DCI)
- 1 Exec. Director of the Nonprofit plus SHIP/MIPPA 1/BEC and several other small programs
- 1 Asst. Dir/Trainer/Regional Liaison
- 6 additional RLs, most of whom have other “hats” (training, MIPPA, BEC, partnerships, etc.)
- Contact Center with PT coordinator/data quality person and 4 CSRs
- Several part-time retired employees, mostly per diem

Missouri SHIP - Staff

- **Director** – high level oversight, supervises FT staff and some PT, activities/inquiries, all grants, federal & state reports, VRPM, TA Center, Community Partner contracts, state and national-level partnerships and relations.
- **Supervisor** – oversees the daily operations of the call center & does data quality work (PDEO).
- **Regional Liaisons & Trainers** – care and feeding of Community Partners and counselors in the 8 regions; 3 train counselors, manage referral processes, some case management, CTM/Marx (includes assistant director, MIPPA-paid staff, BEC coordination)

MISSOURI SHIP REGION MAP

State Health Insurance Assistance Program



MO SHIP Staff – Regional Attributes

- Most AAAs
- Many CILs
- Many Senior Centers, etc. directly
- Most have traditional community volunteers
- All have in-kind counselors
- All have at least 1 \$ Partner

Missouri SHIP - Network

- Many Community Partners have a Volunteer Coordinator who is an employee.
- There are 175 Counselors who work through our Partner Organizations (varies a lot as churn occurs)
- “Friend of” MO SHIPs are a lesser type of partner organization (may provide event space or other collaboration and may have an assigned volunteer counselor who is supported by the RL

Missouri SHIP – A Day in my Life

- Phone calls to the Contact Center = 40-100 DAILY (outside OEP)!
- Contact with counselors/volunteers – Delegated, mostly
- Contact with EDs/MOU-signers - Frequent
- Contact with beneficiaries – Delegated, mostly
- Work pertaining to grants – DAILY!
- Times I delegate tasks to Assist. Dir. – DAILY!
- Years I've worked with Medicare = 6
- Years as a SHIP Director = 5
- Meetings with Aging & Disability Orgs & Others – DAILY!
- *Run a stand-alone nonprofit with a BOD (27 staff in all, including HR/Finance/IT/Operations, 3 call centers, etc.)*

Missouri SHIP – “Sage” Advice

- Ask questions of Steering Committee, other directors, often. You have a “fleet” of SHIPs to rely on.
- SHIPs are strange; each one is unique. We don’t do things the same way.
- Expertise varies, but if we don’t know the answer, we may be able send an S.O.S. to someone who does.
- Give yourself at least 2 years to get your sea legs.
- Support those who make up your crew—thank them twice as much as you think you should.
- “Just keep swimming” is not good advice for the SHIP crew.
- Keep on course and watch for the waypoints—avoid desert isles!
- Embrace ship metaphors!

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Session 3. Program Director Typical Day Part 2

Edward Clark

Scott Miniea

Lucilia Prates, MA SMP Program

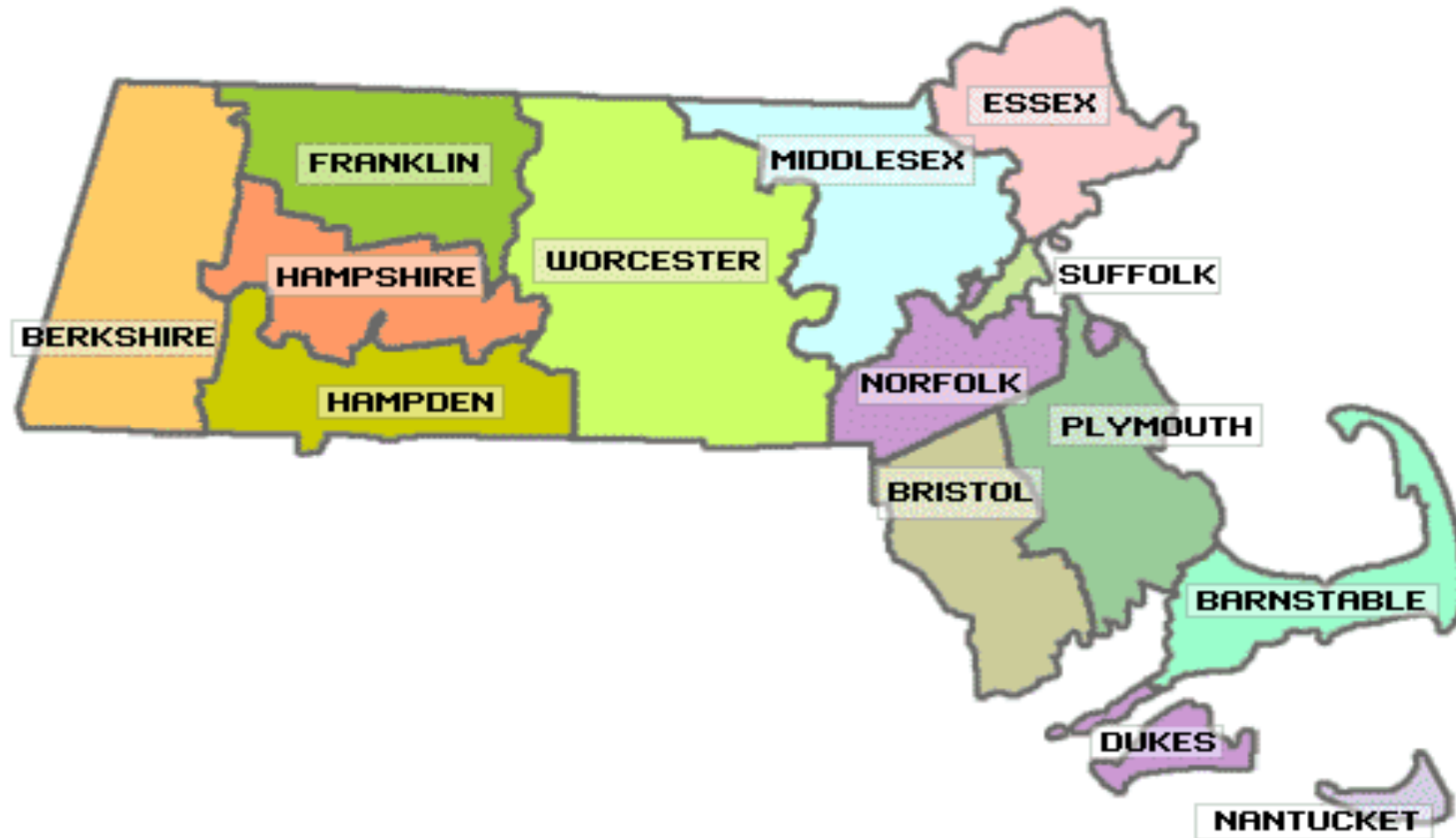
MA SMP Program

- **sub-grantee and volunteer management**
- **contracting, and budget administration**

MA SMP Program

- **1999-2002**—Massachusetts Medicare and Medicaid Outreach and Education (MORE) Program—a partnership with SHIP/SHINE Programs of Elder Services of the Merrimack Valley, Inc, Danvers Council on Aging, Minuteman Elder Services and Mystic Valley Elder Services
- **2002-2005**—MORE became a stand along Statewide Program in response to the Federal RFP. (Director at 30 hours per week and subgrantees)

Massachusetts County Map



MA SMP Program's Statewide Advisory Committee

- **Dean Bates**, Massachusetts Office of the Attorney General
- **Jayne Bonds**, Massachusetts Resident Service Coordinator for Housing
- **Kara Cohen**, Director of Community Services, AARP-Massachusetts
- **Roberto Coviello**, Assistant Special Agent in Charge, OIG
- **Leslie Diaz**, Director, My Ombudsman Program, Disability Policy Consortium
- **James Fuccione**, Senior Director, Mass Healthy Aging Collaborative
- **Adam Frank**, Council on Aging and Grants Coordinator, EOEA
- **Kierra Ho**, Massachusetts, Office for Refugees and Immigrants
- **Betsey Jancaitis**, Fraud Manager, Safeguard Services
- **Amy Lischko**, Associate Professor, Tufts University School of Medicine

MA SMP Program's Statewide Advisory Committee

- **Jacqueline Rodriguez**, Outreach Specialist, CMS-Region I
- **Mary McGinley**, Staff Attorney, Medicare Advocacy Project
- **Annette Peele**, Director of Community Programs, Executive Office of Elder Affairs
- **Chrys Peralta**, Occupational Therapist, Massachusetts Association for the Blind and Visually Impaired
- **Cindy Phillips**, State SHINE Director, Executive Office of Elder Affairs
- **Lucilia Prates**, Director, MA SMP Program, AgeSpan
- **Niels Puetthoff**, Research Analyst, Massachusetts Division of Insurance
- **Chris Steward**, Statewide Money Management Coordinator, Money Management Program
- **Jackie Titone**, Manager of Contracts and Provider Relationships, AgeSpan
- **Kia Weaver**, Outreach Specialist, Quality Improvement Organization, Kepro
- **Rachel Weiner**, Options Counseling Manager, Executive Office of Elder Affairs

MA SMP Program

MA SMP Program Staff

- **Lucilia Prates**, Director
- **Carole Appleton**, Coordinator
- **Gisele Michel**, MA SMP Program's Diversity + Inclusion = Equity Project
- **Joanne Simone**, Volunteer Coordinator
- **Vacant Position**-Outreach and Education Coordinator

A big Thank you to our valued and committed volunteer team members. Without them we could not do all the work we do.

MA SMP Program

Complex Case Counselor working on cases at the Lawrence office.



Current Case Counselors:

- **Carole Appleton, SMP Staff**
- **Judy F., SMP**
- **Fred K., SMP/SHINE**
- **Andrea H., SMP/SHINE**
- **Jim K., SMP**
- **Sue L., SMP/SHINE**
- **Miriam P., SMP/SHINE**
- **Lucilia Prates, SMP**

MA SMP Program's Work Group Model

- Case Management Work Group
- Diversity, Inclusion, Equity and Access Work Group
- Educational Initiative Work Group
- Long Term Care Work Group
- Media and Marketing Work Group
- Outreach and Education Work Group
- SMP Presentation Revamping
- Website Work Group
- MA SMP Program's Statewide Multicultural and Multilingual Beneficiary Conference
- Enrollment and Marketing Work Group
- Ambulance Billing Work Group-
Inactive

- Fanny Chan, **Chinese**
- Judy Gertler
- Andrea Hassol
- Dennis Hohengasser
- Sue Lomastro, **Italian and Spanish**
- Maria Pimentel, **Portuguese**
- **Lucilia Prates, Portuguese and Spanish**
- *Gil and Harriet Rosen*
- Jackie Stern
- Scott Simundza

MA SMP Presenters



Coastline's Elder Celebration

MA SMP Program Volunteer Maria Pimentel staffing MA SMP table at Coastline's Annual Celebration of Elders.



MA SMP Program's Valued Volunteers



Thank You!

Köszönettel

Grazie

Vielen Dank



Obrigado!

Merci

Díky

Ευχαριστώ



Teşekkürler

ขอบคุณ

Hvala

Bedankt



MA SMP Program

