



STATE OF VERMONT
JOINT FISCAL OFFICE

MEMORANDUM

To: James Reardon, Commissioner of Finance & Management
From: Nathan Lavery, Fiscal Analyst
Date: November 5, 2009
Subject: JFO #2396, #2397, #2398

No Joint Fiscal Committee member has requested that the following items be held for review:

JFO #2396 — \$38,026 grant from the U.S. Department of Health and Human Services Administration on Aging to – Department of Disabilities, Aging and Independent Living (DAIL). These grant funds will be used to inform new and existing Medicare beneficiaries about eligibility for federal programs that help them pay for prescription drugs and other health costs, as well as enrollment assistance for these programs.

[JFO received 10/06/09]

JFO #2397 — \$545,842 grant from the Federal Emergency Management Agency (FEMA) to Department of Public Safety. These grant funds will be used to provide financial assistance to implement measures that will permanently reduce or eliminate future damage from natural hazards through safer building practices and improving existing structures.

[JFO received 10/06/09]

JFO #2398 — \$100,000 grant from the U.S. Department of Justice to State's Attorneys and Sheriffs. These grant funds will be used to purchase equipment to document and record Special Investigation Units (SIUs)/Child Advocacy Center interviews, crime scene evidence, etc., and train SIU personnel.

[JFO received 10/06/09]

In accordance with 32 V.S.A. §5, the requisite 30 days having elapsed since these items were submitted to the Joint Fiscal Committee, the Governor's approval may now be considered final. We ask that you inform the Secretary of Administration and your staff of this action.

cc: Joan Senecal, Commissioner
Thomas Tremblay, Commissioner
Jane Woodruff, Executive Director



STATE OF VERMONT
JOINT FISCAL OFFICE

MEMORANDUM

To: Joint Fiscal Committee Members
From: Nathan Lavery, Fiscal Analyst
Date: October 13, 2009
Subject: Grant Requests

Enclosed please find five (5) requests that the Joint Fiscal Office has received from the administration:

JFO #2396 — \$38,026 grant from the U.S. Department of Health and Human Services Administration on Aging to – Department of Disabilities, Aging and Independent Living (DAIL). These grant funds will be used to inform new and existing Medicare beneficiaries about eligibility for federal programs that help them pay for prescription drugs and other health costs, as well as enrollment assistance for these programs.

[JFO received 10/06/09]

JFO #2397 — \$545,842 grant from the Federal Emergency Management Agency (FEMA) to Department of Public Safety. These grant funds will be used to provide financial assistance to implement measures that will permanently reduce or eliminate future damage from natural hazards through safer building practices and improving existing structures.

[JFO received 10/06/09]

JFO #2398 — \$100,000 grant from the U.S. Department of Justice to State's Attorneys and Sheriffs. These grant funds will be used to purchase equipment to document and record Special Investigation Units (SIUs)/Child Advocacy Center interviews, crime scene evidence, etc., and train SIU personnel.

[JFO received 10/06/09]

JFO #2399 — \$130,000 grant from the U.S. Department of Justice to the Department of Public Safety. These grant funds will be used to hire one intelligence analyst who will be assigned to the Vermont Fusion Center (VTFC) to support rural law enforcement investigations in Vermont. **This grant is a competitive award under the American Recovery and Reinvestment Act (ARRA) and expedited approval of this item has been requested.** The Joint Fiscal Committee members will be contacted within two weeks with a request to waive the statutory review period and accept this item.

[JFO received 10/13/09]

JFO #2400 — \$29,220 grant from the U.S. Department Agriculture to the Agency of Agriculture, Food and Markets. These funds will be used to increase the level of participation of Vermont livestock owners in the National Animal Identification System (NAIS).

[JFO received 10/13/09]

The Joint Fiscal Office has reviewed these submissions and determined that all appropriate forms bearing the necessary approvals are in order. In accordance with the procedures for processing such requests, we ask you to review the enclosed and notify the Joint Fiscal Office (Nathan Lavery at (802) 828-1488; nlavery@leg.state.vt.us) if you have questions or would like an item held for Joint Fiscal Committee review. Unless we hear from you to the contrary by October 27 we will assume that you agree to consider as final the Governor's acceptance of these requests.

cc: James Reardon, Commissioner
Roger Allbee, Secretary
Joan Senecal, Commissioner
Thomas Tremblay, Commissioner
Jane Woodruff, Executive Director



STATE OF VERMONT
JOINT FISCAL OFFICE

MEMORANDUM

To: Representative Steven Maier
From: Nathan Lavery, Fiscal Analyst
Date: October 13, 2009
Subject: JFO #2396

Representative Michael Obuchowski asked that I forward to you a copy of the enclosed grant materials and cover memo. He requests your observations regarding the enclosed item.

cc: Rep. Michael Obuchowski
Stephen Klein



State of Vermont
 Department of Finance & Management
 109 State Street, Pavilion Building
 Montpelier, VT 05620-0401

Agency of Administration

[phone] 802-828-2376
 [fax] 802-828-2428

**STATE OF VERMONT
 FINANCE & MANAGEMENT GRANT REVIEW FORM**

Grant Summary:		This is a grant from the federal Department of Health and Human Services, Administration on Aging from their Medicare Enrollment Assistance Program. The purpose of this grant is to inform and assist new and existing Medicare beneficiaries enroll for federal programs to help them pay for prescription drugs. This may have the effect of reducing some pressure on the state's pharmacy program. If beneficiaries enroll in federally paid prescription programs, they may be less apt to rely on the state's Medicaid program for their prescription needs.		
Date:		8/24/2009		
Department:		Department of Disabilities, Aging and Independent Living (DAIL)		
Legal Title of Grant:		Medicare enrollment Assistance Program		
Federal Catalog #:		93.071		
Grant/Donor Name and Address:		DHHS Administration on Aging Office of Grants Management One Massachusetts Ave. NW Room 4772 Washington, DC 20001		
Grant Period:		From:	To:	
		6/1/2009	5/31/2011	
Grant/Donation		38,026		
		SFY 1	SFY 2	SFY 3
Grant Amount:		\$23,000	\$15,026	\$
Position Information:	# Positions	Explanation/Comments		
	0			
Additional Comments:				
This is grant funding which will be awarded to the current SHIP recipient, Northeast Kingdom Council on Aging, Inc. dba Northeastern Vermont Area Agency on Aging (NEVAA)				
Department of Finance & Management		[Signature]		(Initial)
Secretary of Administration		[Signature]		(Initial)

RECEIVED
 OCT 06 2009
 JOINT FISCAL OFFICE

STATE OF VERMONT
FINANCE & MANAGEMENT GRANT REVIEW FORM

Sent To Joint Fiscal Office

Date

9/22/09



STATE OF VERMONT REQUEST FOR GRANT ACCEPTANCE (Form AA-1)

BASIC GRANT INFORMATION				
1. Agency:	Agency of Human Services			
2. Department:	Department of Disabilities, Aging and Independent Living			
3. Program:	Medicare Improvements for Patients and Providers Act of 2008			
4. Legal Title of Grant:	Medicare enrollment Assistance Program			
5. Federal Catalog #:	93.071			
6. Grant/Donor Name and Address:				
DHHS Administration on Aging, Office of Grants Management, One Massachusetts Ave., NW, Rm. 4772, Washington DC 20001				
7. Grant Period:	From:	6/1/2009	To:	5/31/2011
8. Purpose of Grant:				
To inform and assist new and existing Medicare beneficiaries who may be eligible for programs to help them pay for prescription drugs, and other health insurance costs.				
9. Impact on existing program if grant is not Accepted:				
Without this funding the efforts to connect with hard to reach individuals and groups likely to be eligible for low income subsidies and Medicare savings plans will be more difficult and eligible people may not receive health care.				
10. BUDGET INFORMATION				
	SFY 1	SFY 2	SFY 3	Comments
Expenditures:	FY 2010	FY 2011	FY	
Personal Services	\$	\$	\$	
Operating Expenses	\$	\$	\$	
Grants	\$23,000	\$15,026	\$	
Total	\$23,000	\$15,026	\$	
Revenues:				
State Funds:	\$	\$	\$	
Cash	\$	\$	\$	
In-Kind	\$	\$	\$	
Federal Funds:	\$	\$	\$	
(Direct Costs)	\$23,000	\$15,026	\$	
(Statewide Indirect)	\$	\$	\$	
(Departmental Indirect)	\$	\$	\$	
Other Funds:	\$	\$	\$	
Grant (source)	\$	\$	\$	
Total	\$23,000	\$15,026	\$	
Appropriation No:	3460020000		Amount:	\$23,000
				\$
				\$
				\$
				\$

JUL 14 2009

STATE OF VERMONT REQUEST FOR GRANT ACCEPTANCE (Form AA-1)

			\$
			\$
		Total	\$23,000

PERSONAL SERVICE INFORMATION

11. Will monies from this grant be used to fund one or more Personal Service Contracts? Yes No
 If "Yes", appointing authority must initial here to indicate intent to follow current competitive bidding process/policy.

Appointing Authority Name: _____ Agreed by: _____ (initial)

12. Limited Service Position Information:	# Positions	Title
Total Positions		

12a. Equipment and space for these positions: Is presently available. Can be obtained with available funds.

13. AUTHORIZATION AGENCY/DEPARTMENT

I/we certify that no funds beyond basic application preparation and filing costs have been expended or committed in anticipation of Joint Fiscal Committee approval of this grant, unless previous notification was made on Form AA-1PN (if applicable):	Signature: <i>Joan K General</i>	Date: <i>7/11/09</i>
	Title: DAIL Commissioner	
	Signature: <i>Patricia Flood</i>	Date: <i>7/13/09</i>
	Title: DEPUTY SECRETARY	

14. ACTION BY GOVERNOR

<input checked="" type="checkbox"/>	Check One Box: Accepted	 (Governor's signature)	Date: <i>9/19/09</i>
<input type="checkbox"/>	Rejected		Date: _____

15. SECRETARY OF ADMINISTRATION

<input checked="" type="checkbox"/>	Check One Box: Request to JFO		
<input type="checkbox"/>	Information to JFO	(Secretary's signature or designee) <i>Ta Bell</i>	Date: <i>9/16/09</i>

16. DOCUMENTATION REQUIRED


Required GRANT Documentation

<input checked="" type="checkbox"/> Request Memo <input type="checkbox"/> Dept. project approval (if applicable) <input checked="" type="checkbox"/> Notice of Award <input checked="" type="checkbox"/> Grant Agreement <input checked="" type="checkbox"/> Grant Budget	<input type="checkbox"/> Notice of Donation (if any) <input checked="" type="checkbox"/> Grant (Project) Timeline (if applicable) <input type="checkbox"/> Request for Extension (if applicable) <input type="checkbox"/> Form AA-1PN attached (if applicable)
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End Form AA-1

AGENCY OF HUMAN SERVICES
DEPARTMENT OF DISABILITIES, AGING AND INDEPENDENT LIVING

Commissioner's Office
103 South Main Street
Waterbury VT 05671-2301
Voice 241-2401/TTY 241-3557
Fax (802) 241-1363

TO: Grant Reviewers
FROM:  Joan K. Senecal, DAIL Commissioner
DATE: July 1, 2009
SUBJ: MIPPA Grant

Attached please find information regarding the Medicare Improvements for Patients and Providers Act awards (MIPPA) under CFDA # 93.071.

This MIPPA project is jointly funded by four awards that run concurrently. Two of the awards are funded by DHHS/AoA, CFDA # 93.071, for which approval is being requested and the other two are funded by DHHS/CMS, CFDA # 93.779, under which we currently have other awards.

The purpose of the project is to inform and assist new and existing Medicare beneficiaries who may be eligible for programs designed to help them pay for prescriptions drugs and other health insurance costs.

Grant funding will be awarded to the current SHIP subrecipient, Northeast Kingdom Council on Aging, Inc. dba Northeastern Vermont Area Agency on Aging (NEVAA).

Thank you for your consideration of this request.



Notice of Award

Medicare Improvements for Patients and Providers Act of 2008

Grantee:
Vermont Department Aging and Disabilities
Independent Living
Commissioner
103 S. Main St
Waterbury, VT 05671-2301

Date:
June 1, 2009

Grant No.: 09AAVTMIDR **Seq. No.:** 2009 / 1
Award Instrument: Grant (Mandatory)
Budget Period: 06/01/2009 - 05/31/2011

Award Authority: P.L. 110-275

EIN: 1-036000274-A6
DUNS: 809376155

CFDA Program Title	Award This Action	Cumulative Grant Award to Date	Appropriation	Object Class Code
93.071 Medicare Enrollment Assistance Program (Priority A.3 ADRC)	\$17,471	\$17,471	75-X-0142	41.15
Total	\$17,471	\$17,471		

Special Terms and Conditions:

- The terms and conditions of this Notice of Award and other requirements have the following order of precedence if there is any conflict in what they require: (1) the Medicare Improvements for Patients and Providers Act of 2008 (MIPPA); (2) other applicable Federal statutes and their implementing regulations; (3) program regulations; and (4) terms and conditions of award.
- This mandatory grant award is issued under the authority of the Medicare Improvements for Patients and Providers Act of 2008, Section 119, PL 110-275. By requesting or receiving funds under this award, the recipient assures that it will carry out the project/program described in its approved state plan(s) and will comply with the terms and conditions and other requirements of this award.
- This grant award is subject to the requirements applicable under the Medicare Improvements for Patients and Providers Act of 2008.
- This grant is subject to the requirements of the Uniform Administrative Requirement for Grants and Cooperative Agreements to State, Local, and Tribal Governments under Title 45 Code of Federal Regulations, Part 92.
- Funds will be available in two increments: (1) initial 50% of grant funds is available upon approval of the submitted project plan; (2) remaining funds will be available upon AoA and CMS acceptance of the first phase progress report and any modified plans due by March 1, 2010.
- A Financial Status Report (SF-269) is due annually. Reports are due within 90 days of the end of the first 12 months, and then within 90 days of the end of the 24 month period.

7. The first phase progress report is due 9 months after the project start date. The report should be sent no later than March 1, 2010 to CenterforBenefits@ncoa.org. A final report will be due at the end of the 24 month grant period. In addition, quarterly reports of the number of LIS and MSP applications completed should also be sent to CenterforBenefits@ncoa.org. The National Center on Benefits Outreach and Enrollment will provide training and technical assistance to MIPPA grantees.
8. At any phase of the grant period, deliver to the Administration on Aging (AoA) and the Centers for Medicare & Medicaid Services (CMS) upon request, any materials, systems or other items developed, refined, or enhanced under the grant award. The grantee agrees that AoA and CMS shall have royalty-free, nonexclusive, and irrevocable rights to reproduce, publish, or otherwise use and authorize others to use the items for Federal Government purposes.
9. On all new publications funded solely or in part by the MIPPA grant, the grantee shall include the express acknowledgement, "this publication has been created or produced by [the State] with financial assistance, in whole or in part, through a grant from the Administration on Aging and the Centers for Medicare & Medicaid Services. Grantees undertaking projects under government sponsorship are encouraged to express their findings and conclusions. These contents do not necessarily represent the policy of the U.S. Department of Health and Human Services and the grantee should not assume endorsement by the Federal Government." All SHIP grantees are expected to use the SHIP Logo and Tagline on all SHIP publications. (HHS Policy Statement: <http://www.hhs.gov/grantsnet/adminis/gpd/index.htm>).
10. AoA and CMS shall be notified of changes in program name, key personnel (State Official or Program Director), addresses, and telephone numbers immediately upon learning of the change, but not later than 30 days after a change in contact information. These changes include e-mail addresses, website URLs, State toll-free numbers, and any other significant administrative changes.

In accordance with the HHS Policy Statement, the grantee is required to notify both the AoA and CMS Grants Management Officers in writing if the Program Director specifically named in the Notice of Award (NoA) will withdraw from the project entirely, or be absent from the project during any continuous period of 3 months or more. AoA and CMS must approve any alternate arrangement proposed by the recipient, including any replacement of the Program Director or key personnel named in the NoA. http://www.hhs.gov/grantsnet/docs/HHSGPS_107.doc.

11. All records pertaining to the MIPPA grant shall be retained for a period of 3 years after notification of award closeout as set forth and described in 45 C.F.R. §92.42. Copies or other facsimiles of program records, such as electronic media, are acceptable substitutions for original documents.
12. In accordance with procedures contained in 45 C.F.R. §92.43, AoA and CMS may suspend or terminate the grant in whole or in part at any time before the date of expiration, whenever it determines that the grantee has materially failed to comply with the terms of the grant. AoA and CMS will promptly notify the grantee in writing of the determination and the reasons for the suspension or termination, the effective date of such action, and the opportunity for appeal.
13. Payment under this award will be made available through the HHS Departmental Payment System (PMS). PMS provides instructions for making withdrawals of Federal funds. Inquiries regarding payments should be directed to Program Support Center/Division of Payment Management (PSC/DPM), DHHS; Post Office Box 6021; Rockville, MD 20852; 1-877-614-5533; PMSSupport@psc.gov.

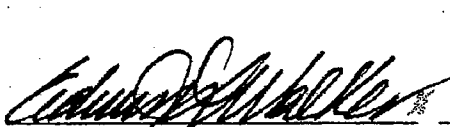
AoA Contact Information:

AoA Regional Administrator

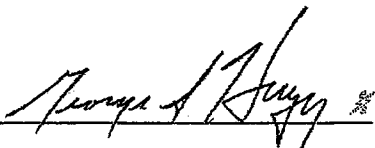
Name: Dan Quirk
Telephone: (212) 264-2976
E-mail: dan.quirk@aoa.hhs.gov

AoA Fiscal Award Administrator

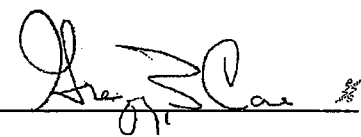
Name: Jerry Perlman
Telephone: (212) 264-4343
E-mail: jerry.perlman@aoa.hhs.gov



AoA Authorizing Official



Funds Certifying Official



AoA Grants Officer



Notice of Award

Medicare Improvements for Patients and Providers Act of 2008

Grantee:
Vermont
Vermont Department Aging and Disabilities
Commissioner
103 S. Main St
Waterbury, VT 05676

Date:
June 1, 2009

Grant No.: 09AAVTMIPP **Seq. No.:** 2009 / 1
Award Instrument: Grant (Mandatory)
Budget Period: 06/01/2009 - 05/31/2011

Award Authority: P.L. 110-275

EIN: 1-036000274-A6
DUNS: 809376155

CFDA Program Title	Award This Action	Cumulative Grant Award to Date	Appropriation	Object Class Code
93.071 Medicare Enrollment Assistance Program (Priority A.2 AAA)	\$20,555	\$20,555	75-X-0142	41.15
Total	\$20,555	\$20,555		

Special Terms and Conditions:

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- A Financial Status Report (SF-269) is due annually. Reports are due within 90 days of the end of the first 12 months, and then within 90 days of the end of the 24 month period.

7. The first phase progress report is due 9 months after the project start date. The report should be sent no later than March 1, 2010 to CenterforBenefits@ncoa.org. A final report will be due at the end of the 24 month grant period. In addition, quarterly reports of the number of LIS and MSP applications completed should also be sent to CenterforBenefits@ncoa.org. The National Center on Benefits Outreach and Enrollment will provide training and technical assistance to MIPPA grantees.
8. At any phase of the grant period, deliver to the Administration on Aging (AoA) and the Centers for Medicare & Medicaid Services (CMS) upon request, any materials, systems or other items developed, refined, or enhanced under the grant award. The grantee agrees that AoA and CMS shall have royalty-free, nonexclusive, and irrevocable rights to reproduce, publish, or otherwise use and authorize others to use the items for Federal Government purposes.
9. On all new publications funded solely or in part by the MIPPA grant, the grantee shall include the express acknowledgement, "this publication has been created or produced by [the State] with financial assistance, in whole or in part, through a grant from the Administration on Aging and the Centers for Medicare & Medicaid Services. Grantees undertaking projects under government sponsorship are encouraged to express their findings and conclusions. These contents do not necessarily represent the policy of the U.S. Department of Health and Human Services and the grantee should not assume endorsement by the Federal Government." All SHIP grantees are expected to use the SHIP Logo and Tagline on all SHIP publications. (HHS Policy Statement: <http://www.hhs.gov/grantsnet/adminis/gpd/index.htm>).
10. AoA and CMS shall be notified of changes in program name, key personnel (State Official or Program Director), addresses, and telephone numbers immediately upon learning of the change, but not later than 30 days after a change in contact information. These changes include e-mail addresses, website URLs, State toll-free numbers, and any other significant administrative changes.

In accordance with the HHS Policy Statement, the grantee is required to notify both the AoA and CMS Grants Management Officers in writing if the Program Director specifically named in the Notice of Award (NoA) will withdraw from the project entirely, or be absent from the project during any continuous period of 3 months or more. AoA and CMS must approve any alternate arrangement proposed by the recipient, including any replacement of the Program Director or key personnel named in the NoA. http://www.hhs.gov/grantsnet/docs/HHSGPS_107.doc.

11. All records pertaining to the MIPPA grant shall be retained for a period of 3 years after notification of award closeout as set forth and described in 45 C.F.R. §92.42. Copies or other facsimiles of program records, such as electronic media, are acceptable substitutions for original documents.
12. In accordance with procedures contained in 45 C.F.R. §92.43, AoA and CMS may suspend or terminate the grant in whole or in part at any time before the date of expiration, whenever it determines that the grantee has materially failed to comply with the terms of the grant. AoA and CMS will promptly notify the grantee in writing of the determination and the reasons for the suspension or termination, the effective date of such action, and the opportunity for appeal.
13. Payment under this award will be made available through the HHS Departmental Payment System (PMS). PMS provides instructions for making withdrawals of Federal funds. Inquiries regarding payments should be directed to Program Support Center/Division of Payment Management (PSC/DPM), DHHS; Post Office Box 6021; Rockville, MD 20852; 1-877-614-5533; PMSSupport@psc.gov.

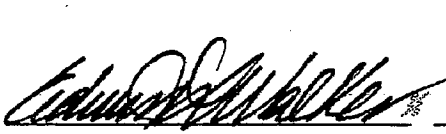
AoA Contact Information:

AoA Regional Administrator

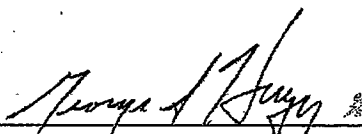
Name: Dan Quirk
Telephone: (212) 264-2976
E-mail: dan.quirk@aoa.hhs.gov

AoA Fiscal Award Administrator

Name: Jerry Perlman
Telephone: (212) 264-4343
E-mail: jerry.perlman@aoa.hhs.gov



AoA Authorizing Official



Funds Certifying Official



AoA Grants Officer

SHIP/AAA/ADRC LIS/MSP Outreach Funds

Each funded entity is required to complete and separately respond to questions 1-10. The funded entities must jointly prepare a response for the four collaborative questions.

Please note the Department of Disabilities, Aging and Independent Living (DAIL) is applying for Priority A.1, A.2 and A.3 funding. DAIL operates its SHIP program in cooperation with Vermont's five Area Agencies on Aging (AAA), through a grant agreement with the Northeastern Vermont Area Agency on Aging (NEVAAA). Through this arrangement the NEVAAA provides statewide leadership for the SHIP and employs a SHIP Program Director, who oversees Regional SHIP program operations and supports five SHIP Program Coordinators who are employed by their local AAA. AAAs are key partners with DAIL, as well as other providers, in Vermont's Aging and Disability Resource Connections project. DAIL, AAAs and VT ADRC will be collaborating closely regarding LIS and MSP outreach.

1. Will all funds provided for LIS or MSP outreach and assistance efforts be used solely to support outreach and assistance efforts directed toward Medicare beneficiaries with limited incomes who may be eligible for LIS or MSP programs? (Yes or No – Note that an answer of Yes is required to be eligible for funding.)

Yes.

2. Will all activities described by the SHIP to reach people likely eligible for LIS or MSP programs be above and beyond those regular activities that the SHIP has planned in response to funding provided under the Basic SHIP Grant Award? (Yes or No – Note that an answer of Yes is required to be eligible for funding.) If yes, please describe how this supplemental funding will extend or enhance the LIS or MSP outreach and assistance efforts that you will provide in response to the Basic SHIP Grant Award funding.

Yes. Supplemental funding will allow us to continue our efforts to connect with hard-to-reach individuals and groups likely to be LIS or MSP eligible. With less total funding available to support the outreach and assistance functions of the SHIP program this year, these funds will allow us to continue our work with the Vermont Medicare Modernization Act (MMA) Task Force, a statewide work group created by the Vermont Legislature to assist Vermont beneficiaries. The Task Force's Outreach and Education sub-committee coordinates statewide efforts to educate Vermonters and their families about Medicare Part D and the Low Income Subsidy (LIS) program.

The Task Force includes more than 25 individuals representing a broad range of organizations including Area Agencies on Aging, the Vermont Aging and Disabilities Resource Connections (ADRC), the Vermont SHIP, the Vermont Department of Disabilities, Aging and Independent Living (DAIL), the Office of Vermont Health Access (OVHA), other state agencies, advocacy groups, the Social Security Administration (SSA) and the Centers for Medicare and Medicaid Services (CMS). Supplemental funding will allow us to focus our outreach efforts in two additional areas: 1) the remaining 2000 or so individuals in Vermont who are likely to be LIS/MSP

eligible but who have not registered for these programs; and 2) new beneficiaries likely to be LIS/MSP eligible.

3. Will your state use county and zip code specific data provided by CMS or AoA to target efforts related to reach beneficiaries who are likely eligible, but not enrolled for LIS, MSP or State Prescription Assistance Programs? If yes, please indicate how that data will be used to target the outreach and assistance efforts of the SHIP. If no, please indicate how the State will identify and target people who are likely eligible, but not enrolled for LIS, MSP, or SPAP programs?

Yes. Vermont is in the unique position of having enrolled over 98% of individuals eligible for the LIS/MSP programs in the state. The state's SHIP Program Director has relied upon county and zip code data provided by the Centers for Medicare and Medicaid Services and the Social Security Administration for at least a year to guide our outreach efforts, and will continue to do as we attempt to precisely identify and target the remaining individuals who have not enrolled in these programs.

A new data set being developed by the Vermont Division of Economic Services (Department for Children & Families) in response to recent changes in Vermont's Fuel Assistance and Supplemental Nutrition Assistance Program (SNAP) programs will be utilized to identify and target individuals who are likely eligible for LIS/MSP and the State Pharmacy Assistance Program.

4. How will the State use the funding to enhance or expand application assistance available in communities with beneficiaries who are likely eligible, but not enrolled for LIS or MSP programs? (Examples – recruiting and training counselors placed in low-income neighborhoods or communities, training community-based organizations that serve low-income beneficiaries to provide application assistance, establishing new local counseling sites in low-income communities, etc)

SHIP staff, working in conjunction with their AAA and ADRC colleagues, will enhance LIS/MSP/SPAP application assistance in Vermont communities by offering training and consultation to an expanded group of community partners as follows:

- a. We will integrate our work with outreach efforts being conducted by staff of the Office of Vermont Health Access (OVHA), the Bi-State Primary Care Association and other groups working to expand health care coverage to all Vermonters through the state's suite of Green Mountain Care programs.
- b. Program information and application assistance regarding the LIS/MSP/SPAP programs will be made available to all ten ADRC partners.
- c. As part of Vermont's "Blueprint for Health" program (a statewide effort to help avoid and manage chronic illness), "community care teams" have been established at three pilot sites around the state. Application assistance training and consultation will be offered to members of these teams by SHIP program staff.

- d. With the economic downturn, local Community Action Agencies have seen an influx of consumers seeking assistance for a wide variety of basic needs. Many of these individuals may be LIS/MSP/SPAP eligible. Application assistance training and consultation will be offered to members of these organizations by SHIP program staff.
 - e. Considerable efforts have been made in recent months to publicize the expansion of the state's Supplemental Nutrition Assistance Program (SNAP), known in Vermont at the "3SquaresVT" program. Eligibility guidelines have been expanded in order to help more consumers address the issue of food insecurity. Many of these individuals are also likely to be eligible for the LIS/MSP/SPAP programs. Application assistance training and consultation will be offered to Food Stamp Outreach Specialists working at the Area Agencies on Aging by SHIP program staff.
 - f. SHIP program volunteers, recruited as part of our collaboration with staff of the Health Assistance Partnership program, will be trained to provide information and application assistance through outreach efforts at senior centers, federally qualified health centers, libraries, churches, faith-based organizations and other community venues.
5. What specific activities will the State use to conduct outreach likely to persuade beneficiaries who are likely eligible, but not enrolled in LIS or MSP to apply for one or both of these programs? (Example – direct mail, outreach events, public and media activities, door-to-door outreach). Please be specific about the state outreach plan.
- a. The SHIP State Program Director has initiated negotiations with the leadership of the Social Security Administration here in Vermont to establish a Memorandum of Understanding with the three SSA field offices serving the state for the purposes of using the resources of both organizations to identify, target and assist potential LIS/MSP eligible individuals who have not yet enrolled in LIS/MSP. In order to preserve confidentiality between organizations, SHIP program staff will prepare direct mail pieces and forward them to SSA staff for mailing to beneficiaries potentially eligible for these programs.
 - b. Outreach to New Beneficiaries – AARP: SHIP Program staff will partner with the Vermont chapter of AARP to reach potential LIS/MSP eligible individuals reaching the age of Medicare eligibility. Many of these individuals are also family caregivers of older adults. Our outreach efforts will be targeted towards both those becoming eligible for Medicare as well as the older adults in their lives who may be LIS/MSP eligible.
 - c. Website Redesign: The Vermont SHIP Program has begun work on redesigning its website in order to make the information contained on the site more readily accessible to consumers. Links to information about the LIS/MSP/SPAP programs will be included.

- d. **Media Activities:** Vermont SHIP program staff will distribute press releases, make radio and television talk show appearances; and create radio public service announcements to promote the LIS/MSP programs.
- e. **Direct Messaging to Potential Beneficiaries:** Several state agencies send correspondence on a regular basis to potential LIS/MSP beneficiaries (e.g., fuel assistance notices, SNAP program updates, etc.) SHIP program staff will work with the state's Economic Services Division to explore the possibility of using these communications as a vehicle for informing potential beneficiaries about the opportunity to apply for the LIS/MSP/SPAP programs.
- f. **Elimination of SPAP:** Should Vermont's SPAP program be eliminated, as is currently being proposed, the state will likely engage in an extraordinary effort to educate beneficiaries about the options available to help pay for their prescription drug costs. SHIP program staff will monitor legislative activity on this front closely and, should the SPAP program be eliminated, utilize the public attention given to this issue to publicize the LIS/MSP program.
6. Will the State establish or expand partnerships that will enable the State to reach and/or provide application assistance to people who are likely eligible, but not enrolled in LIS or MSP programs? YES (Yes or No)

If Yes, what specific partnerships will the State establish or expand and what populations (described either geographically or demographically) will the partnership allow the State to reach? What specific activities will result from the partnership? [NOTE – THIS IS A POSSIBLE CHART]

Partner Organization	Population Served	Activities
Social Security Administration	Eligible beneficiaries not yet enrolled in LIS/MSP.	Direct mail/outreach targeting these individuals.
AARP – Vermont	Vermont residents over the age of 50.	Assistance with the dissemination of outreach materials with particular emphasis on new beneficiaries & family caregivers.
OVHA/Bi-State Primary Care	Individuals without health insurance coverage	Training/consultation regarding application assistance to outreach staff.
Aging & Disability Resource Connection	Elders & adults with disabilities. Expansion to individuals who have sustained brain injuries.	Training/consultation regarding application assistance to all ADRC member organizations.
Vermont Blueprint for Health – Community Care Teams	Adults with chronic health conditions & their families.	Training/consultation regarding application assistance to care team members.
Community Action Agencies	Low-income individuals.	Training/consultation regarding application assistance to outreach staff.

Food Stamp Outreach Specialists – Area Agencies on Aging	SNAP eligible beneficiaries and their families.	Training/consultation regarding application assistance to outreach staff.
Vermont Center for Independent Living	Disabled youth and adults living in Vermont	Training/consultation regarding application assistance to outreach staff.
Vermont 211	Statewide information, referral and assistance program for Vermont residents.	Training/consultation regarding application assistance to outreach staff.
Vermont Department of Labor	Displaced workers and their families	Training/consultation regarding application assistance to outreach staff.
Chamber of Commerce	Displaced workers and their families	Training/consultation regarding application assistance to outreach staff.

6A: Where applicable, how will the state coordinate with the Native American programs on LIS, MSPs and Part D outreach? – Not applicable

SHIP/AAA/ADRC Rural Part D Outreach Funds

7. Will all funds provided for rural outreach to Part D eligible Medicare beneficiaries be used to reach and assist people who live in rural areas and who are eligible for Medicare Part D? (Yes or No – Note that an answer of Yes is required to be eligible for funding.)

Yes. The entire catchment area has been classified as “rural” by the AOA.

8. Will all the activities described by the State to reach people Part D eligible Medicare beneficiaries in rural areas be above and beyond those regular activities that the State has planned in response to other funding, e.g. Basic SHIP Grant Award or OAA Outreach? (Yes or No – Note that an answer of Yes is required to be eligible for funding.)

Yes.

9. What specific activities will the State use to conduct outreach likely to reach beneficiaries living in rural areas with information about Medicare Part D coverage and the associated LIS/MSP programs for beneficiaries with limited incomes? (Example – direct mail, outreach events, public and media activities)

- a. The SHIP State Program Director has initiated negotiations with the leadership of the Social Security Administration here in Vermont to establish a Memorandum of Understanding with the three SSA field offices serving the state for the purposes of using the resources of both organizations to identify, target and assist potential LIS/MSP eligible individuals who have not yet enrolled in LIS/MSP. In order to preserve confidentiality between organizations, SHIP program staff will prepare direct mail pieces and forward them to SSA staff for mailing to beneficiaries potentially eligible for these programs.
- b. Outreach to New Beneficiaries – AARP: SHIP Program staff will partner with the Vermont chapter of AARP to reach potential LIS/MSP eligible individuals reaching

the age of Medicare eligibility. Many of these individuals are also family caregivers of older adults. Our outreach efforts will be targeted towards both those becoming eligible for Medicare as well as the older adults in their lives who may be LIS/MSP eligible.

- c. Website Redesign: The Vermont SHIP Program has begun work on redesigning its website in order to make the information contained on the site more readily accessible to consumers. Links to information about the LIS/MSP/SPAP programs will be included.
 - d. Media Activities: Vermont SHIP program staff will distribute press releases, make radio and television talk show appearances; and create radio public service announcements to promote the LIS/MSP programs.
 - e. Direct Messaging to Potential Beneficiaries: Several state agencies send correspondence on a regular basis to potential LIS/MSP beneficiaries (e.g., fuel assistance notices, SNAP program updates, etc.) SHIP program staff will work with the state's Economic Services Division to explore the possibility of using these communications as a vehicle for informing potential beneficiaries about the opportunity to apply for the LIS/MSP/SPAP programs.
 - f. Elimination of SPAP: Should Vermont's SPAP program be eliminated, as is currently being proposed, the state will likely engage in an extraordinary effort to educate beneficiaries about the options available to help pay for their prescription drug costs. SHIP program staff will monitor legislative activity on this front closely and, should the SPAP program be eliminated, utilize the public attention given to this issue to publicize the LIS/MSP program.
10. How will the State use the funding to enhance or expand application assistance available in rural areas of the state? (Examples – recruiting and training counselors deployed to serve rural areas, training community-based organizations that serve beneficiaries living in rural areas, establishing new local counseling sites in rural areas, etc)

SHIP staff, working in conjunction with their AAA and ADRC colleagues, will enhance LIS/MSP/SPAP application assistance in Vermont communities by offering training and consultation to an expanded group of community partners as follows:

- a. We will integrate our work with outreach efforts being conducted by staff of the Office of Vermont Health Access (OVHA), the Bi-State Primary Care Association and other groups working to expand health care coverage to all Vermonters through the state's suite of Green Mountain Care programs.
- b. Program information and application assistance regarding the LIS/MSP/SPAP programs will be made available to all ADRC partners.

- c. As part of Vermont's "Blueprint for Health" program (a statewide effort to help avoid and manage chronic illness), "community care teams" have been established at three pilot sites around the state. Application assistance training and consultation will be offered to members of these teams by SHIP program staff.
- d. With the economic downturn, local Community Action Agencies have seen an influx of consumers seeking assistance for a wide variety of basic needs. Many of these individuals may be LIS/MSP/SPAP eligible. Application assistance training and consultation will be offered to members of these organizations by SHIP program staff.
- e. Considerable efforts have been made in recent months to publicize the expansion of the state's Supplemental Nutrition Assistance Program (SNAP), known in Vermont at the "3SquaresVT" program. Eligibility guidelines have been expanded in order to help more consumers address the issue of food insecurity. Many of these individuals are also likely to be eligible for the LIS/MSP/SPAP programs. Application assistance training and consultation will be offered to Food Stamp Outreach Specialists working at the Area Agencies on Aging by SHIP program staff.
- f. SHIP program volunteers, recruited as part of our collaboration with staff of the Health Assistance Partnership program, will be trained to provide information and application assistance through outreach efforts at senior centers, federally qualified health centers, libraries, churches, faith-based organizations and other community venues.

State Questions – Collaborative Efforts

1. What are the quantifiable outcome targets of the collaborative efforts of the SHIP, AAAs and ADRCs to reach and provide application assistance to beneficiaries who are likely eligible, but not enrolled in LIS, MSP and/or Part D programs and how will the effort be measured? For example, the State may propose to generate a target number of applications for these programs and track those applications through a specific data system or tool. Please do not state the targets in terms of a number of outreach events or counseling sessions, but rather in terms of a number of applications submitted or another quantifiable target that will demonstrate progress in getting more beneficiaries enrolled in these programs.

Outcome Target #1: Working with the Social Security Administration and Vermont's AAA's and ADRC project, SHIP program staff will identify and contact the approximately 2000 individuals living in the state who are potentially eligible for the LIS and MSP programs.

Outcome Target #2: Working with the Vermont Center for Independent Living, the Social Security Administration, Vermont AARP, the state's Economic Services Division and an expanded roster of community-based groups, we will insure that all Vermonters

newly eligible for Medicare receive information and assistance regarding the LIS/MSP and SPAP programs.

Outcome Target #3: Vermont will increase the percentage of eligible individuals enrolled in the LIS and MSP programs to 99%.

2. How will the State measure and report progress toward the stated outcome target?

Outcome Target #1: 1) Confirm mailing of letters by SSA to the approximately 2000 individuals who are eligible but not enrolled in LIS/MSP; 2) Tally reply cards from individuals who have received mailing; 3) Follow up with those individuals interested in pursuing LIS/MSP application; 4) Track number of completed applications submitted with SHIP/ADRC/AAA staff assistance.

Outcome Target #2: 1) Document current methods by which new Medicare enrollees learn of LIS/MSP and SPAP programs; 2) Perform gap analysis; 3) Identify new strategies for outreach to eligible but not enrolled individuals; 4) Implement new strategies and track consumer response via applications.

Outcome Target #3: 1) Relying upon CMS and OVHA data, monitor enrollment percentages in the LIS/MSP and SPAP programs.

3. What specific work plan will the state utilize to coordinate the efforts of the SHIP, AAAs and ADRC that are funded under this program to assure that work is collaborative, that resources of the programs are leveraged to provide maximum effectiveness, and that work is not duplicative? [NOTE – THIS MAY BE A 250-WORD ANSWER.]

Because each regional SHIP program in Vermont is housed within an Area Agency on Aging, program staff works closely with their AAA and ADRC colleagues, as well as other community-based groups outside the aging network. SHIP program staff also serves as Vermont Senior Medicare Patrol (SMP) program coordinators for their region, and work closely with the Community of Vermont Elders (COVE) and other state and local agencies that hold membership in the Vermont Medicare Modernization Act (MMA) Task Force, a statewide work group created by the Vermont Legislature to assist Vermont Medicare beneficiaries. The Task Force's Outreach and Education sub-committee coordinates statewide efforts to educate Vermonters and their families about Medicare Part D, the LIS/MSP programs and other related services. MMA Task Force members include the Vermont Department of Disabilities, Aging and Independent Living (DAIL), the Vermont SHIP, the Office of Vermont Health Access (OVHA), other state agencies, advocacy groups, the Social Security Administration and CMS.

At the state level, oversight of the SHIP, AAA and ADRC programs is centralized within the Department of Disabilities, Aging and Independent Living and overseen by core staff working within the State Unit on Aging. Staff has strong working relationships across state government that helps support service coordination, minimizes duplication of effort and maximizes the return on dollars invested in these programs.

At the local level, SHIP staff and their AAA and ADRC colleagues develop and maintain important relationships with a diversity of local stakeholders including pharmacists, mental health and primary care providers, hospital business office representatives, low-income advocates, and individuals representing many other groups.

4. Please provide a timeline for the 24 month duration of this grant that will outline the planned activities of the SHIP, AAA, and ADRC programs and the anticipated progress toward achieving the goal the State outlined in response to Question 1 of this section.

Attachment B: Budget Narrative

Revised to reflect spend of grant award only

Object Class Category	Federal Funds	Non-Federal Cash	Non-Federal In-Kind	TOTAL	Justification
Personnel	\$2,395	\$0	\$0	\$2,395	Health Insurance Info Specialist – 1 hours/week @ \$14.84/hour Administrative Assistant – .6 hours/week @\$13.65/hour
Fringe Benefits	\$790	\$0	\$0	\$790	Includes FICA, Workers' Comp., Health Insurance, Unemployment Compensation, Pension
Travel	\$0	\$0	\$0	\$0	None Requested
Equipment	\$0	\$0	\$0	\$0	No equipment requested
Supplies	\$1,046	\$0	\$0	\$1,046	Materials for outreach effort/ mailing/postage
Contractual	\$30,979	\$0	\$0	\$30,979	Subcontracts - Area Agencies on Aging (4)
Other	\$0	\$0	\$0	\$0	
Indirect Charges	\$2,816	\$0	\$0	\$2,816	Federal limited to 8% of direct costs
TOTAL	\$38,026	\$0	\$0	\$38,026	

Attachment B: Budget Narrative

Object Class Category	Federal Funds	Non-Federal Cash	Non-Federal In-Kind	TOTAL	Justification
Personnel	\$5,216	\$0	\$0	\$5,216	Health Insurance Info Specialist – 2 hours/week @ \$14.84/hour Administrative Assistant – 1.5 hours/week @\$13.65/hour
Fringe Benefits	\$1,721	\$0	\$0	\$1,721	Includes FICA, Workers' Comp., Health Insurance, Unemployment Compensation, Pension
Travel	\$0	\$0	\$0	\$0	None Requested
Equipment	\$0	\$0	\$0	\$0	No equipment requested
Supplies	\$2,359	\$0	\$0	\$2,359	Materials for outreach effort/ mailing/postage
Contractual	\$66,662	\$0	\$0	\$66,662	Subcontracts - Area Agencies on Aging (4)
Other	\$0	\$0	\$0	\$0	
Indirect Charges	\$6,077	\$0	\$13,878	\$19,955	Federal limited to 8% of direct costs
TOTAL	\$82,035	\$0	\$13,878	\$95,913	

Attachment D: Project Work Plan, Objective #1 – Years 1 & 2

Goal: Expand the number of eligible individuals enrolled in Low Income Subsidy, Medicare Savings Plan and Vermont's State Pharmacy Assistance Program.

Measurable Outcome(s):

Outcome Target #1: Working with the Social Security Administration and Vermont's AAA's and ADRC project, SHIP program staff will identify and contact the approximately 2000 individuals living in the state who are potentially eligible for the LIS and MSP programs.

Outcome Target #2: Working with the Vermont Center for Independent Living, the Social Security Administration, Vermont AARP and a host of other groups, we will insure that all Vermonters newly eligible for Medicare receive information and assistance regarding the LIS/MSP and SPAP programs.

Outcome Target #3: Vermont will increase the percentage of eligible individuals enrolled in the LIS and MSP programs to 99%.

Major Objectives	Key Tasks	Lead Person	Timeframe (Start and End Date by Month)											
			1	2	3	4	5	6	7	8	9	10	11	12
	Year #1													
1. Outreach to existing Medicare beneficiaries.	1) Negotiate memorandum of understanding with SSA leadership.	SHIP Program Director	X	X										
	2) Prepare mailing for distribution by SSA.	SHIP/AAA/ADRC Staff			X	X								
	3) Tally reply cards from individuals who have received mailing.	SHIP/AAA/ADRC Staff					X	X	X					
	4) Follow up with those interested in pursuing LIS/MSP application.	SHIP Regional Coordinators					X	X	X	X	X	X	X	X
	5) Track number of completed applications submitted with SHIP, ADRC & AAA staff assistance.	SHIP Regional Coordinator & Program Director					X	X	X	X	X	X	X	X
	Year #2													
	1) Prepare mailing for distribution by SSA.	SHIP/AAA/ADRC Staff	X	X										
	2) Tally reply cards from individuals who have received mailing.	SHIP/AAA/ADRC Staff			X	X	X							
	3) Follow up with those interested in pursuing LIS/MSP application.	SHIP Regional Coordinators			X	X	X	X	X	X	X	X	X	X
	4) Track number of completed applications submitted with SHIP, ADRC & AAA staff assistance.	SHIP Regional Coordinator & Program Director			X	X	X	X	X	X	X	X	X	X

Attachment D: Project Work Plan, Objective #3 – Years 1 & 2

Major Objectives	Key Tasks	Lead Person	Timeframe (Start and End Date by Month)											
			Year #1											
			1	2	3	4	5	6	7	8	9	10	11	12
3. Increase % of eligible individuals enrolled in LIS & MSP programs to 99%.	1) Establish baseline data.	SHIP Program Director	x	x										
	2) Monitor enrollment percentages in the LIS & MSP programs using CMS/SSA data.	SHIP Program Director			x	x	x	x	x	X	x	x	x	x
	3) Adjust outreach strategies accordingly.	SHIP Program Director					x	x	x	X	x	x	x	x
			Year #2											
	1) Review year one data.	SHIP Program Director	x											
	2) Monitor enrollment percentages in the LIS & MSP programs using CMS/SSA data.	SHIP Program Director		x	x	x	x	x	x	X	x	x	x	x
	3) Adjust outreach strategies accordingly.	SHIP Program Director		x	x	x	x	x	x	x	x	x	x	x

Project Abstract

The grantee, a collaborative comprised of Vermont's Department of Disabilities, Aging and Independent Living, five Area Agencies on Aging, the Vermont State Health Insurance Assistance Program and the state's Aging and Disability Resource Connection project, is requesting funds for a 24 month initiative to help Vermonters with low and modest incomes pay for their prescription medication.

The goal of the project is to inform and assist new and existing Medicare beneficiaries who may be eligible for programs designed to help them pay for prescription drugs and other health insurance costs. The goal will be achieved by contacting beneficiaries who have not yet enrolled in these programs and offering them assistance to do so. Efforts will be also be made to contact individuals new to the Medicare program, and to work collaboratively with other community providers who may have contact with these individuals.

The objectives of the proposed project are: 1) to contact by mail the nearly 2000 Vermont residents who may be eligible for these programs, but who have not yet enrolled in them, and offer information and enrollment assistance; 2) to contact new Medicare beneficiaries to inform them of the availability of these programs and offer enrollment assistance; and 3) to increase the awareness of other community providers about these programs and to encourage them to refer consumers for enrollment assistance.

The expected outcomes of this project are: 1) to increase the enrollment of Medicare beneficiaries in the Low Income Subsidy and Medical Savings Program offered by the federal government to 99% of eligible residents in the state of Vermont; and 2) to increase participation rates in the State's Pharmacy Assistance Program.

The products from this project are: 1) an interim and final report; 2) a memorandum of understanding between the collaborative and the local field offices of the Social Security Administration; 3) a letter and reply card to be mailed to beneficiaries eligible for these programs; and 4) a data set reflecting the outcomes of the initiative.



State of Vermont
 Department of Finance & Management
 109 State Street, Pavilion Building
 Montpelier, VT 05620-0401

Agency of Administration

[phone] 802-828-2376
 [fax] 802-828-2428

**STATE OF VERMONT
 FINANCE & MANAGEMENT GRANT REVIEW FORM**

Grant Summary: This is a grant from the federal Department of Health and Human Services, Administration on Aging from their Medicare Enrollment Assistance Program. The purpose of this grant is to inform and assist new and existing Medicare beneficiaries enroll for federal programs to help them pay for prescription drugs. This may have the effect of reducing some pressure on the state's pharmacy program. If beneficiaries enroll in federally paid prescription programs, they may be less apt to rely on the state's Medicaid program for their prescription needs.

Date: 8/24/2009

Department: Department of Disabilities, Aging and Independent Living (DAIL)

Legal Title of Grant: Medicare enrollment Assistance Program

Federal Catalog #: 93.071

Grant/Donor Name and Address: DHHS Administration on Aging
 Office of Grants Management
 One Massachusetts Ave. NW Room 4772
 Washington, DC 20001

Grant Period: From: 6/1/2009 To: 5/31/2011

Grant/Donation: 38,026

	SFY 1	SFY 2	SFY 3	Comments
Grant Amount:	\$23,000	\$15,026	\$	

Position Information:	# Positions	Explanation/Comments
	0	

Additional Comments:
 This is grant funding which will be awarded to the current SHIP recipient, Northeast Kingdom Council on Aging, Inc. dba Northeastern Vermont Area Agency on Aging (NEVAA)

Department of Finance & Management *[Signature]* (Initial)
 Secretary of Administration *[Signature]* (Initial)

RECEIVED
 OCT 06 2009
 JOINT FISCAL OFFICE

STATE OF VERMONT
FINANCE & MANAGEMENT GRANT REVIEW FORM

Sent To Joint Fiscal Office

Date

9/22/09



STATE OF VERMONT REQUEST FOR GRANT ACCEPTANCE (Form AA-1)

BASIC GRANT INFORMATION

1. Agency:	Agency of Human Services		
2. Department:	Department of Disabilities, Aging and Independent Living		
3. Program:	Medicare Improvements for Patients and Providers Act of 2008		
4. Legal Title of Grant:	Medicare enrollment Assistance Program		
5. Federal Catalog #:	93.071		
6. Grant/Donor Name and Address:	DHHS Administration on Aging, Office of Grants Management, One Massachusetts Ave., NW, Rm. 4772, Washington DC 20001		
7. Grant Period:	From:	6/1/2009	To: 5/31/2011
8. Purpose of Grant:	To inform and assist new and existing Medicare beneficiaries who may be eligible for programs to help them pay for prescription drugs, and other health insurance costs.		
9. Impact on existing program if grant is not Accepted:	Without this funding the efforts to connect with hard to reach individuals and groups likely to be eligible for low income subsidies and Medicare savings plans will be more difficult and eligible people may not receive health care.		

10. BUDGET INFORMATION

	SFY 1 FY 2010	SFY 2 FY 2011	SFY 3 FY	Comments
Expenditures:				
Personal Services	\$	\$	\$	
Operating Expenses	\$	\$	\$	
Grants	\$23,000	\$15,026	\$	
Total	\$23,000	\$15,026	\$	
Revenues:				
State Funds:	\$	\$	\$	
Cash	\$	\$	\$	
In-Kind	\$	\$	\$	
Federal Funds:	\$	\$	\$	
(Direct Costs)	\$23,000	\$15,026	\$	
(Statewide Indirect)	\$	\$	\$	
(Departmental Indirect)	\$	\$	\$	
Other Funds:	\$	\$	\$	
Grant (source)	\$	\$	\$	
Total	\$23,000	\$15,026	\$	

Appropriation No:	3460020000	Amount:	\$23,000
			\$
			\$
			\$
			\$

JUL 14 2009

STATE OF VERMONT REQUEST FOR GRANT ACCEPTANCE (Form AA-1)

		\$
		\$
	Total	\$23,000

PERSONAL SERVICE INFORMATION

11. Will monies from this grant be used to fund one or more Personal Service Contracts? Yes No
 If "Yes", appointing authority must initial here to indicate intent to follow current competitive bidding process/policy.

Appointing Authority Name: _____ Agreed by: _____ (initial)

12. Limited Service Position Information:	# Positions	Title
Total Positions		

12a. Equipment and space for these positions: Is presently available. Can be obtained with available funds.

13. AUTHORIZATION AGENCY/DEPARTMENT

I/we certify that no funds beyond basic application preparation and filing costs have been expended or committed in anticipation of Joint Fiscal Committee approval of this grant, unless previous notification was made on Form AA-1PN (if applicable):	Signature: <i>Jean K General</i>	Date: <i>7/1/09</i>
	Title: DAIL Commissioner	
	Signature: <i>Patricia Flood</i>	Date: <i>7/13/09</i>
	Title: DEPUTY SECRETARY	

14. ACTION BY GOVERNOR

<input checked="" type="checkbox"/> Check One Box: Accepted	<i>[Signature]</i> (Governor's/signature)	<i>9/19/09</i> Date:
<input type="checkbox"/> Rejected		

15. SECRETARY OF ADMINISTRATION

<input checked="" type="checkbox"/> Check One Box: Request to JFO	<i>[Signature]</i> (Secretary's signature or designee)	<i>9/16/09</i> Date:
<input type="checkbox"/> Information to JFO		

16. DOCUMENTATION REQUIRED


Required GRANT Documentation

<input checked="" type="checkbox"/> Request Memo	<input type="checkbox"/> Notice of Donation (if any)
<input type="checkbox"/> Dept. project approval (if applicable)	<input checked="" type="checkbox"/> Grant (Project) Timeline (if applicable)
<input checked="" type="checkbox"/> Notice of Award	<input type="checkbox"/> Request for Extension (if applicable)
<input checked="" type="checkbox"/> Grant Agreement	<input type="checkbox"/> Form AA-1PN attached (if applicable)
<input checked="" type="checkbox"/> Grant Budget	

End Form AA-1

AGENCY OF HUMAN SERVICES
DEPARTMENT OF DISABILITIES, AGING AND INDEPENDENT LIVING

Commissioner's Office
103 South Main Street
Waterbury VT 05671-2301
Voice 241-2401/TTY 241-3557
Fax (802) 241-1363

TO: Grant Reviewers
FROM:  Joan K. Senecal, DAIL Commissioner
DATE: July 1, 2009
SUBJ: MIPPA Grant

Attached please find information regarding the Medicare Improvements for Patients and Providers Act awards (MIPPA) under CFDA # 93.071.

This MIPPA project is jointly funded by four awards that run concurrently. Two of the awards are funded by DHHS/AoA, CFDA # 93.071, for which approval is being requested and the other two are funded by DHHS/CMS, CFDA # 93.779, under which we currently have other awards.

The purpose of the project is to inform and assist new and existing Medicare beneficiaries who may be eligible for programs designed to help them pay for prescriptions drugs and other health insurance costs.

Grant funding will be awarded to the current SHIP subrecipient, Northeast Kingdom Council on Aging, Inc. dba Northeastern Vermont Area Agency on Aging (NEVAA).

Thank you for your consideration of this request.



Notice of Award

Medicare Improvements for Patients and Providers Act of 2008

Grantee:
Vermont Department Aging and Disabilities
Independent Living
Commissioner
103 S. Main St
Waterbury, VT 05671-2301

Date:
June 1, 2009

Grant No.: 09AAVTMIDR **Seq. No.:** 2009 / 1
Award Instrument: Grant (Mandatory)
Budget Period: 06/01/2009 - 05/31/2011

Award Authority: P.L. 110-275

EIN: 1-036000274-A6
DUNS: 809376155

CFDA Program Title	Award This Action	Cumulative Grant Award to Date	Appropriation	Object Class Code
93.071 Medicare Enrollment Assistance Program (Priority A.3 ADRC)	\$17,471	\$17,471	75-X-0142	41.15
Total	\$17,471	\$17,471		

Special Terms and Conditions:

- The terms and conditions of this Notice of Award and other requirements have the following order of precedence if there is any conflict in what they require: (1) the Medicare Improvements for Patients and Providers Act of 2008 (MIPPA); (2) other applicable Federal statutes and their implementing regulations; (3) program regulations; and (4) terms and conditions of award.
- This mandatory grant award is issued under the authority of the Medicare Improvements for Patients and Providers Act of 2008, Section 119, PL 110-275. By requesting or receiving funds under this award, the recipient assures that it will carry out the project/program described in its approved state plan(s) and will comply with the terms and conditions and other requirements of this award.
- This grant award is subject to the requirements applicable under the Medicare Improvements for Patients and Providers Act of 2008.
- This grant is subject to the requirements of the Uniform Administrative Requirement for Grants and Cooperative Agreements to State, Local, and Tribal Governments under Title 45 Code of Federal Regulations, Part 92.
- Funds will be available in two increments: (1) initial 50% of grant funds is available upon approval of the submitted project plan; (2) remaining funds will be available upon AoA and CMS acceptance of the first phase progress report and any modified plans due by March 1, 2010.
- A Financial Status Report (SF-269) is due annually. Reports are due within 90 days of the end of the first 12 months, and then within 90 days of the end of the 24 month period.

7. The first phase progress report is due 9 months after the project start date. The report should be sent no later than March 1, 2010 to CenterforBenefits@ncoa.org. A final report will be due at the end of the 24 month grant period. In addition, quarterly reports of the number of LIS and MSP applications completed should also be sent to CenterforBenefits@ncoa.org. The National Center on Benefits Outreach and Enrollment will provide training and technical assistance to MIPPA grantees.
8. At any phase of the grant period, deliver to the Administration on Aging (AoA) and the Centers for Medicare & Medicaid Services (CMS) upon request, any materials, systems or other items developed, refined, or enhanced under the grant award. The grantee agrees that AoA and CMS shall have royalty-free, nonexclusive, and irrevocable rights to reproduce, publish, or otherwise use and authorize others to use the items for Federal Government purposes.
9. On all new publications funded solely or in part by the MIPPA grant, the grantee shall include the express acknowledgement, "this publication has been created or produced by [the State] with financial assistance, in whole or in part, through a grant from the Administration on Aging and the Centers for Medicare & Medicaid Services. Grantees undertaking projects under government sponsorship are encouraged to express their findings and conclusions. These contents do not necessarily represent the policy of the U.S. Department of Health and Human Services and the grantee should not assume endorsement by the Federal Government." All SHIP grantees are expected to use the SHIP Logo and Tagline on all SHIP publications. (HHS Policy Statement: <http://www.hhs.gov/grantsnet/adminis/gpd/index.htm>).
10. AoA and CMS shall be notified of changes in program name, key personnel (State Official or Program Director), addresses, and telephone numbers immediately upon learning of the change, but not later than 30 days after a change in contact information. These changes include e-mail addresses, website URLs, State toll-free numbers, and any other significant administrative changes.

In accordance with the HHS Policy Statement, the grantee is required to notify both the AoA and CMS Grants Management Officers in writing if the Program Director specifically named in the Notice of Award (NoA) will withdraw from the project entirely, or be absent from the project during any continuous period of 3 months or more. AoA and CMS must approve any alternate arrangement proposed by the recipient, including any replacement of the Program Director or key personnel named in the NoA. http://www.hhs.gov/grantsnet/docs/HHSGPS_107.doc.

11. All records pertaining to the MIPPA grant shall be retained for a period of 3 years after notification of award closeout as set forth and described in 45 C.F.R. §92.42. Copies or other facsimiles of program records, such as electronic media, are acceptable substitutions for original documents.
12. In accordance with procedures contained in 45 C.F.R. §92.43, AoA and CMS may suspend or terminate the grant in whole or in part at any time before the date of expiration, whenever it determines that the grantee has materially failed to comply with the terms of the grant. AoA and CMS will promptly notify the grantee in writing of the determination and the reasons for the suspension or termination, the effective date of such action, and the opportunity for appeal.
13. Payment under this award will be made available through the HHS Departmental Payment System (PMS). PMS provides instructions for making withdrawals of Federal funds. Inquiries regarding payments should be directed to Program Support Center/Division of Payment Management (PSC/DPM), DHHS; Post Office Box 6021; Rockville, MD 20852; 1-877-614-5533; PMSSupport@psc.gov.

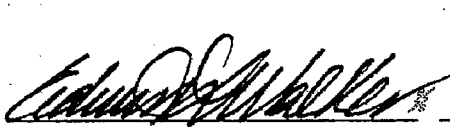
AoA Contact Information:

AoA Regional Administrator

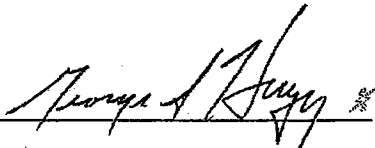
Name: Dan Quirk
Telephone: (212) 264-2976
E-mail: dan.quirk@aoa.hhs.gov

AoA Fiscal Award Administrator

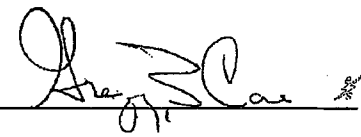
Name: Jerry Perlman
Telephone: (212) 264-4343
E-mail: jerry.perlman@aoa.hhs.gov



AoA Authorizing Official



Funds Certifying Official



AoA Grants Officer



Notice of Award

Medicare Improvements for Patients and Providers Act of 2008

Grantee:
Vermont
Vermont Department Aging and Disabilities
Commissioner
103 S. Main St
Waterbury, VT 05676

Date:
June 1, 2009

Grant No.: 09AAVTMIPP **Seq. No.:** 2009 / 1
Award Instrument: Grant (Mandatory)
Budget Period: 06/01/2009 - 05/31/2011

Award Authority: P.L. 110-275

EIN: 1-036000274-A6
DUNS: 809376155

CFDA Program Title	Award This Action	Cumulative Grant Award to Date	Appropriation	Object Class Code
93.071 Medicare Enrollment Assistance Program (Priority A.2 AAA)	\$20,555	\$20,555	75-X-0142	41.15
Total	\$20,555	\$20,555		

Special Terms and Conditions:

- The terms and conditions of this Notice of Award and other requirements have the following order of precedence if there is any conflict in what they require: (1) the Medicare Improvements for Patients and Providers Act of 2008 (MIPPA); (2) other applicable Federal statutes and their implementing regulations; (3) program regulations; and (4) terms and conditions of award.
- This mandatory grant award is issued under the authority of the Medicare Improvements for Patients and Providers Act of 2008, Section 119, PL 110-275. By requesting or receiving funds under this award, the recipient assures that it will carry out the project/program described in its approved state plan(s) and will comply with the terms and conditions and other requirements of this award.
- This grant award is subject to the requirements applicable under the Medicare Improvements for Patients and Providers Act of 2008.
- This grant is subject to the requirements of the Uniform Administrative Requirement for Grants and Cooperative Agreements to State, Local, and Tribal Governments under Title 45 Code of Federal Regulations, Part 92.
- Funds will be available in two increments: (1) initial 50% of grant funds is available upon approval of the submitted project plan; (2) remaining funds will be available upon AoA and CMS acceptance of the first phase progress report and any modified plans due by March 1, 2010.
- A Financial Status Report (SF-269) is due annually. Reports are due within 90 days of the end of the first 12 months, and then within 90 days of the end of the 24 month period.

7. The first phase progress report is due 9 months after the project start date. The report should be sent no later than March 1, 2010 to CenterforBenefits@ncoa.org. A final report will be due at the end of the 24 month grant period. In addition, quarterly reports of the number of LIS and MSP applications completed should also be sent to CenterforBenefits@ncoa.org. The National Center on Benefits Outreach and Enrollment will provide training and technical assistance to MIPPA grantees.
8. At any phase of the grant period, deliver to the Administration on Aging (AoA) and the Centers for Medicare & Medicaid Services (CMS) upon request, any materials, systems or other items developed, refined, or enhanced under the grant award. The grantee agrees that AoA and CMS shall have royalty-free, nonexclusive, and irrevocable rights to reproduce, publish, or otherwise use and authorize others to use the items for Federal Government purposes.
9. On all new publications funded solely or in part by the MIPPA grant, the grantee shall include the express acknowledgement, "this publication has been created or produced by [the State] with financial assistance, in whole or in part, through a grant from the Administration on Aging and the Centers for Medicare & Medicaid Services. Grantees undertaking projects under government sponsorship are encouraged to express their findings and conclusions. These contents do not necessarily represent the policy of the U.S. Department of Health and Human Services and the grantee should not assume endorsement by the Federal Government." All SHIP grantees are expected to use the SHIP Logo and Tagline on all SHIP publications. (HHS Policy Statement: <http://www.hhs.gov/grantsnet/adminis/gpd/index.htm>).
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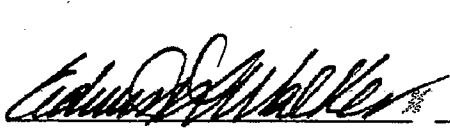
AoA Contact Information:

AoA Regional Administrator

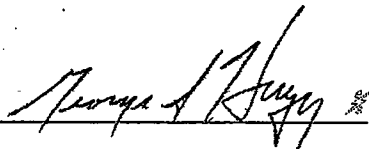
Name: Dan Quirk
Telephone: (212) 264-2976
E-mail: dan.quirk@aoa.hhs.gov

AoA Fiscal Award Administrator

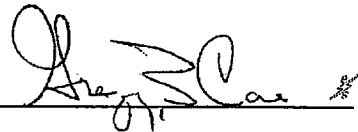
Name: Jerry Perlman
Telephone: (212) 264-4343
E-mail: jerry.perlman@aoa.hhs.gov



AoA Authorizing Official



Funds Certifying Official



AoA Grants Officer

SHIP/AAA/ADRC LIS/MSP Outreach Funds

Each funded entity is required to complete and separately respond to questions 1-10. The funded entities must jointly prepare a response for the four collaborative questions.

Please note the Department of Disabilities, Aging and Independent Living (DAIL) is applying for Priority A.1, A.2 and A.3 funding. DAIL operates its SHIP program in cooperation with Vermont's five Area Agencies on Aging (AAA), through a grant agreement with the Northeastern Vermont Area Agency on Aging (NEVAAA). Through this arrangement the NEVAAA provides statewide leadership for the SHIP and employs a SHIP Program Director, who oversees Regional SHIP program operations and supports five SHIP Program Coordinators who are employed by their local AAA. AAAs are key partners with DAIL, as well as other providers, in Vermont's Aging and Disability Resource Connections project. DAIL, AAAs and VT ADRC will be collaborating closely regarding LIS and MSP outreach.

1. Will all funds provided for LIS or MSP outreach and assistance efforts be used solely to support outreach and assistance efforts directed toward Medicare beneficiaries with limited incomes who may be eligible for LIS or MSP programs? (Yes or No – Note that an answer of Yes is required to be eligible for funding.)

Yes.

2. Will all activities described by the SHIP to reach people likely eligible for LIS or MSP programs be above and beyond those regular activities that the SHIP has planned in response to funding provided under the Basic SHIP Grant Award? (Yes or No – Note that an answer of Yes is required to be eligible for funding.) If yes, please describe how this supplemental funding will extend or enhance the LIS or MSP outreach and assistance efforts that you will provide in response to the Basic SHIP Grant Award funding.

Yes. Supplemental funding will allow us to continue our efforts to connect with hard-to-reach individuals and groups likely to be LIS or MSP eligible. With less total funding available to support the outreach and assistance functions of the SHIP program this year, these funds will allow us to continue our work with the Vermont Medicare Modernization Act (MMA) Task Force, a statewide work group created by the Vermont Legislature to assist Vermont beneficiaries. The Task Force's Outreach and Education sub-committee coordinates statewide efforts to educate Vermonters and their families about Medicare Part D and the Low Income Subsidy (LIS) program.

The Task Force includes more than 25 individuals representing a broad range of organizations including Area Agencies on Aging, the Vermont Aging and Disabilities Resource Connections (ADRC), the Vermont SHIP, the Vermont Department of Disabilities, Aging and Independent Living (DAIL), the Office of Vermont Health Access (OVHA), other state agencies, advocacy groups, the Social Security Administration (SSA) and the Centers for Medicare and Medicaid Services (CMS). Supplemental funding will allow us to focus our outreach efforts in two additional areas: 1) the remaining 2000 or so individuals in Vermont who are likely to be LIS/MSP

eligible but who have not registered for these programs; and 2) new beneficiaries likely to be LIS/MSP eligible.

3. Will your state use county and zip code specific data provided by CMS or AoA to target efforts related to reach beneficiaries who are likely eligible, but not enrolled for LIS, MSP or State Prescription Assistance Programs? If yes, please indicate how that data will be used to target the outreach and assistance efforts of the SHIP. If no, please indicate how the State will identify and target people who are likely eligible, but not enrolled for LIS, MSP, or SPAP programs?

Yes. Vermont is in the unique position of having enrolled over 98% of individuals eligible for the LIS/MSP programs in the state. The state's SHIP Program Director has relied upon county and zip code data provided by the Centers for Medicare and Medicaid Services and the Social Security Administration for at least a year to guide our outreach efforts, and will continue to do as we attempt to precisely identify and target the remaining individuals who have not enrolled in these programs.

A new data set being developed by the Vermont Division of Economic Services (Department for Children & Families) in response to recent changes in Vermont's Fuel Assistance and Supplemental Nutrition Assistance Program (SNAP) programs will be utilized to identify and target individuals who are likely eligible for LIS/MSP and the State Pharmacy Assistance Program.

4. How will the State use the funding to enhance or expand application assistance available in communities with beneficiaries who are likely eligible, but not enrolled for LIS or MSP programs? (Examples – recruiting and training counselors placed in low-income neighborhoods or communities, training community-based organizations that serve low-income beneficiaries to provide application assistance, establishing new local counseling sites in low-income communities, etc)

SHIP staff, working in conjunction with their AAA and ADRC colleagues, will enhance LIS/MSP/SPAP application assistance in Vermont communities by offering training and consultation to an expanded group of community partners as follows:

- a. We will integrate our work with outreach efforts being conducted by staff of the Office of Vermont Health Access (OVHA), the Bi-State Primary Care Association and other groups working to expand health care coverage to all Vermonters through the state's suite of Green Mountain Care programs.
- b. Program information and application assistance regarding the LIS/MSP/SPAP programs will be made available to all ten ADRC partners.
- c. As part of Vermont's "Blueprint for Health" program (a statewide effort to help avoid and manage chronic illness), "community care teams" have been established at three pilot sites around the state. Application assistance training and consultation will be offered to members of these teams by SHIP program staff.

- d. With the economic downturn, local Community Action Agencies have seen an influx of consumers seeking assistance for a wide variety of basic needs. Many of these individuals may be LIS/MSP/SPAP eligible. Application assistance training and consultation will be offered to members of these organizations by SHIP program staff.
 - e. Considerable efforts have been made in recent months to publicize the expansion of the state's Supplemental Nutrition Assistance Program (SNAP), known in Vermont at the "3SquaresVT" program. Eligibility guidelines have been expanded in order to help more consumers address the issue of food insecurity. Many of these individuals are also likely to be eligible for the LIS/MSP/SPAP programs. Application assistance training and consultation will be offered to Food Stamp Outreach Specialists working at the Area Agencies on Aging by SHIP program staff.
 - f. SHIP program volunteers, recruited as part of our collaboration with staff of the Health Assistance Partnership program, will be trained to provide information and application assistance through outreach efforts at senior centers, federally qualified health centers, libraries, churches, faith-based organizations and other community venues.
5. What specific activities will the State use to conduct outreach likely to persuade beneficiaries who are likely eligible, but not enrolled in LIS or MSP to apply for one or both of these programs? (Example – direct mail, outreach events, public and media activities, door-to-door outreach). Please be specific about the state outreach plan.
- a. The SHIP State Program Director has initiated negotiations with the leadership of the Social Security Administration here in Vermont to establish a Memorandum of Understanding with the three SSA field offices serving the state for the purposes of using the resources of both organizations to identify, target and assist potential LIS/MSP eligible individuals who have not yet enrolled in LIS/MSP. In order to preserve confidentiality between organizations, SHIP program staff will prepare direct mail pieces and forward them to SSA staff for mailing to beneficiaries potentially eligible for these programs.
 - b. Outreach to New Beneficiaries – AARP: SHIP Program staff will partner with the Vermont chapter of AARP to reach potential LIS/MSP eligible individuals reaching the age of Medicare eligibility. Many of these individuals are also family caregivers of older adults. Our outreach efforts will be targeted towards both those becoming eligible for Medicare as well as the older adults in their lives who may be LIS/MSP eligible.
 - c. Website Redesign: The Vermont SHIP Program has begun work on redesigning its website in order to make the information contained on the site more readily accessible to consumers. Links to information about the LIS/MSP/SPAP programs will be included.

- d. Media Activities: Vermont SHIP program staff will distribute press releases, make radio and television talk show appearances; and create radio public service announcements to promote the LIS/MSP programs.
 - e. Direct Messaging to Potential Beneficiaries: Several state agencies send correspondence on a regular basis to potential LIS/MSP beneficiaries (e.g., fuel assistance notices, SNAP program updates, etc.) SHIP program staff will work with the state's Economic Services Division to explore the possibility of using these communications as a vehicle for informing potential beneficiaries about the opportunity to apply for the LIS/MSP/SPAP programs.
 - f. Elimination of SPAP: Should Vermont's SPAP program be eliminated, as is currently being proposed, the state will likely engage in an extraordinary effort to educate beneficiaries about the options available to help pay for their prescription drug costs. SHIP program staff will monitor legislative activity on this front closely and, should the SPAP program be eliminated, utilize the public attention given to this issue to publicize the LIS/MSP program.
6. Will the State establish or expand partnerships that will enable the State to reach and/or provide application assistance to people who are likely eligible, but not enrolled in LIS or MSP programs? YES (Yes or No)

If Yes, what specific partnerships will the State establish or expand and what populations (described either geographically or demographically) will the partnership allow the State to reach? What specific activities will result from the partnership? [NOTE – THIS IS A POSSIBLE CHART]

Partner Organization	Population Served	Activities
Social Security Administration	Eligible beneficiaries not yet enrolled in LIS/MSP.	Direct mail/outreach targeting these individuals.
AARP – Vermont	Vermont residents over the age of 50.	Assistance with the dissemination of outreach materials with particular emphasis on new beneficiaries & family caregivers.
OVHA/Bi-State Primary Care	Individuals without health insurance coverage	Training/consultation regarding application assistance to outreach staff.
Aging & Disability Resource Connection	Elders & adults with disabilities. Expansion to individuals who have sustained brain injuries.	Training/consultation regarding application assistance to all ADRC member organizations.
Vermont Blueprint for Health – Community Care Teams	Adults with chronic health conditions & their families.	Training/consultation regarding application assistance to care team members.
Community Action Agencies	Low-income individuals.	Training/consultation regarding application assistance to outreach staff.

Food Stamp Outreach Specialists – Area Agencies on Aging	SNAP eligible beneficiaries and their families.	Training/consultation regarding application assistance to outreach staff.
Vermont Center for Independent Living	Disabled youth and adults living in Vermont	Training/consultation regarding application assistance to outreach staff.
Vermont 211	Statewide information, referral and assistance program for Vermont residents.	Training/consultation regarding application assistance to outreach staff.
Vermont Department of Labor	Displaced workers and their families	Training/consultation regarding application assistance to outreach staff.
Chamber of Commerce	Displaced workers and their families	Training/consultation regarding application assistance to outreach staff.

6A: Where applicable, how will the state coordinate with the Native American programs on LIS, MSPs and Part D outreach? – Not applicable

SHIP/AAA/ADRC Rural Part D Outreach Funds

7. Will all funds provided for rural outreach to Part D eligible Medicare beneficiaries be used to reach and assist people who live in rural areas and who are eligible for Medicare Part D? (Yes or No – Note that an answer of Yes is required to be eligible for funding.)

Yes. The entire catchment area has been classified as “rural” by the AOA.

8. Will all the activities described by the State to reach people Part D eligible Medicare beneficiaries in rural areas be above and beyond those regular activities that the State has planned in response to other funding, e.g. Basic SHIP Grant Award or OAA Outreach? (Yes or No – Note that an answer of Yes is required to be eligible for funding.)

Yes.

9. What specific activities will the State use to conduct outreach likely to reach beneficiaries living in rural areas with information about Medicare Part D coverage and the associated LIS/MSP programs for beneficiaries with limited incomes? (Example – direct mail, outreach events, public and media activities)

a. The SHIP State Program Director has initiated negotiations with the leadership of the Social Security Administration here in Vermont to establish a Memorandum of Understanding with the three SSA field offices serving the state for the purposes of using the resources of both organizations to identify, target and assist potential LIS/MSP eligible individuals who have not yet enrolled in LIS/MSP. In order to preserve confidentiality between organizations, SHIP program staff will prepare direct mail pieces and forward them to SSA staff for mailing to beneficiaries potentially eligible for these programs.

b. Outreach to New Beneficiaries – AARP: SHIP Program staff will partner with the Vermont chapter of AARP to reach potential LIS/MSP eligible individuals reaching

the age of Medicare eligibility. Many of these individuals are also family caregivers of older adults. Our outreach efforts will be targeted towards both those becoming eligible for Medicare as well as the older adults in their lives who may be LIS/MSP eligible.

- c. Website Redesign: The Vermont SHIP Program has begun work on redesigning its website in order to make the information contained on the site more readily accessible to consumers. Links to information about the LIS/MSP/SPAP programs will be included.
 - d. Media Activities: Vermont SHIP program staff will distribute press releases, make radio and television talk show appearances; and create radio public service announcements to promote the LIS/MSP programs.
 - e. Direct Messaging to Potential Beneficiaries: Several state agencies send correspondence on a regular basis to potential LIS/MSP beneficiaries (e.g., fuel assistance notices, SNAP program updates, etc.) SHIP program staff will work with the state's Economic Services Division to explore the possibility of using these communications as a vehicle for informing potential beneficiaries about the opportunity to apply for the LIS/MSP/SPAP programs.
 - f. Elimination of SPAP: Should Vermont's SPAP program be eliminated, as is currently being proposed, the state will likely engage in an extraordinary effort to educate beneficiaries about the options available to help pay for their prescription drug costs. SHIP program staff will monitor legislative activity on this front closely and, should the SPAP program be eliminated, utilize the public attention given to this issue to publicize the LIS/MSP program.
10. How will the State use the funding to enhance or expand application assistance available in rural areas of the state? (Examples – recruiting and training counselors deployed to serve rural areas, training community-based organizations that serve beneficiaries living in rural areas, establishing new local counseling sites in rural areas, etc)

SHIP staff, working in conjunction with their AAA and ADRC colleagues, will enhance LIS/MSP/SPAP application assistance in Vermont communities by offering training and consultation to an expanded group of community partners as follows:

- a. We will integrate our work with outreach efforts being conducted by staff of the Office of Vermont Health Access (OVHA), the Bi-State Primary Care Association and other groups working to expand health care coverage to all Vermonters through the state's suite of Green Mountain Care programs.
- b. Program information and application assistance regarding the LIS/MSP/SPAP programs will be made available to all ADRC partners.

- c. As part of Vermont's "Blueprint for Health" program (a statewide effort to help avoid and manage chronic illness), "community care teams" have been established at three pilot sites around the state. Application assistance training and consultation will be offered to members of these teams by SHIP program staff.
- d. With the economic downturn, local Community Action Agencies have seen an influx of consumers seeking assistance for a wide variety of basic needs. Many of these individuals may be LIS/MSP/SPAP eligible. Application assistance training and consultation will be offered to members of these organizations by SHIP program staff.
- e. Considerable efforts have been made in recent months to publicize the expansion of the state's Supplemental Nutrition Assistance Program (SNAP), known in Vermont at the "3SquaresVT" program. Eligibility guidelines have been expanded in order to help more consumers address the issue of food insecurity. Many of these individuals are also likely to be eligible for the LIS/MSP/SPAP programs. Application assistance training and consultation will be offered to Food Stamp Outreach Specialists working at the Area Agencies on Aging by SHIP program staff.
- f. SHIP program volunteers, recruited as part of our collaboration with staff of the Health Assistance Partnership program, will be trained to provide information and application assistance through outreach efforts at senior centers, federally qualified health centers, libraries, churches, faith-based organizations and other community venues.

State Questions – Collaborative Efforts

1. What are the quantifiable outcome targets of the collaborative efforts of the SHIP, AAAs and ADRCs to reach and provide application assistance to beneficiaries who are likely eligible, but not enrolled in LIS, MSP and/or Part D programs and how will the effort be measured? For example, the State may propose to generate a target number of applications for these programs and track those applications through a specific data system or tool. Please do not state the targets in terms of a number of outreach events or counseling sessions, but rather in terms of a number of applications submitted or another quantifiable target that will demonstrate progress in getting more beneficiaries enrolled in these programs.

Outcome Target #1: Working with the Social Security Administration and Vermont's AAA's and ADRC project, SHIP program staff will identify and contact the approximately 2000 individuals living in the state who are potentially eligible for the LIS and MSP programs.

Outcome Target #2: Working with the Vermont Center for Independent Living, the Social Security Administration, Vermont AARP, the state's Economic Services Division and an expanded roster of community-based groups, we will insure that all Vermonters

newly eligible for Medicare receive information and assistance regarding the LIS/MSP and SPAP programs.

Outcome Target #3: Vermont will increase the percentage of eligible individuals enrolled in the LIS and MSP programs to 99%.

2. How will the State measure and report progress toward the stated outcome target?

Outcome Target #1: 1) Confirm mailing of letters by SSA to the approximately 2000 individuals who are eligible but not enrolled in LIS/MSP; 2) Tally reply cards from individuals who have received mailing; 3) Follow up with those individuals interested in pursuing LIS/MSP application; 4) Track number of completed applications submitted with SHIP/ADRC/AAA staff assistance.

Outcome Target #2: 1) Document current methods by which new Medicare enrollees learn of LIS/MSP and SPAP programs; 2) Perform gap analysis; 3) Identify new strategies for outreach to eligible but not enrolled individuals; 4) Implement new strategies and track consumer response via applications.

Outcome Target #3: 1) Relying upon CMS and OVHA data, monitor enrollment percentages in the LIS/MSP and SPAP programs.

3. What specific work plan will the state utilize to coordinate the efforts of the SHIP, AAAs and ADRC that are funded under this program to assure that work is collaborative, that resources of the programs are leveraged to provide maximum effectiveness, and that work is not duplicative? [NOTE – THIS MAY BE A 250-WORD ANSWER.]

Because each regional SHIP program in Vermont is housed within an Area Agency on Aging, program staff works closely with their AAA and ADRC colleagues, as well as other community-based groups outside the aging network. SHIP program staff also serves as Vermont Senior Medicare Patrol (SMP) program coordinators for their region, and work closely with the Community of Vermont Elders (COVE) and other state and local agencies that hold membership in the Vermont Medicare Modernization Act (MMA) Task Force, a statewide work group created by the Vermont Legislature to assist Vermont Medicare beneficiaries. The Task Force's Outreach and Education sub-committee coordinates statewide efforts to educate Vermonters and their families about Medicare Part D, the LIS/MSP programs and other related services. MMA Task Force members include the Vermont Department of Disabilities, Aging and Independent Living (DAIL), the Vermont SHIP, the Office of Vermont Health Access (OVHA), other state agencies, advocacy groups, the Social Security Administration and CMS.

At the state level, oversight of the SHIP, AAA and ADRC programs is centralized within the Department of Disabilities, Aging and Independent Living and overseen by core staff working within the State Unit on Aging. Staff has strong working relationships across state government that helps support service coordination, minimizes duplication of effort and maximizes the return on dollars invested in these programs.

At the local level, SHIP staff and their AAA and ADRC colleagues develop and maintain important relationships with a diversity of local stakeholders including pharmacists, mental health and primary care providers, hospital business office representatives, low-income advocates, and individuals representing many other groups.

4. Please provide a timeline for the 24 month duration of this grant that will outline the planned activities of the SHIP, AAA, and ADRC programs and the anticipated progress toward achieving the goal the State outlined in response to Question 1 of this section.

Attachment B: Budget Narrative

Revised to reflect spending of grant award only

Object Class Category	Federal Funds	Non-Federal Cash	Non-Federal In-Kind	TOTAL	Justification
Personnel	\$2,395	\$0	\$0	\$2,395	Health Insurance Info Specialist – 1 hours/week @ \$14.84/hour Administrative Assistant – .6 hours/week @\$13.65/hour
Fringe Benefits	\$790	\$0	\$0	\$790	Includes FICA, Workers' Comp., Health Insurance, Unemployment Compensation, Pension
Travel	\$0	\$0	\$0	\$0	None Requested
Equipment	\$0	\$0	\$0	\$0	No equipment requested
Supplies	\$1,046	\$0	\$0	\$1,046	Materials for outreach effort/ mailing/postage
Contractual	\$30,979	\$0	\$0	\$30,979	Subcontracts - Area Agencies on Aging (4)
Other	\$0	\$0	\$0	\$0	
Indirect Charges	\$2,816	\$0	\$0	\$2,816	Federal limited to 8% of direct costs
TOTAL	\$38,026	\$0	\$0	\$38,026	

Attachment B: Budget Narrative

Object Class Category	Federal Funds	Non-Federal Cash	Non-Federal In-Kind	TOTAL	Justification
Personnel	\$5,216	\$0	\$0	\$5,216	Health Insurance Info Specialist – 2 hours/week @ \$14.84/hour Administrative Assistant – 1.5 hours/week @\$13.65/hour
Fringe Benefits	\$1,721	\$0	\$0	\$1,721	Includes FICA, Workers' Comp., Health Insurance, Unemployment Compensation, Pension
Travel	\$0	\$0	\$0	\$0	None Requested
Equipment	\$0	\$0	\$0	\$0	No equipment requested
Supplies	\$2,359	\$0	\$0	\$2,359	Materials for outreach effort/ mailing/postage
Contractual	\$66,662	\$0	\$0	\$66,662	Subcontracts - Area Agencies on Aging (4)
Other	\$0	\$0	\$0	\$0	
Indirect Charges	\$6,077	\$0	\$13,878	\$19,955	Federal limited to 8% of direct costs
TOTAL	\$82,035	\$0	\$13,878	\$95,913	

Attachment D: Project Work Plan, Objective #1 – Years 1 & 2

Goal: Expand the number of eligible individuals enrolled in Low Income Subsidy, Medicare Savings Plan and Vermont's State Pharmacy Assistance Program.

Measurable Outcome(s):

Outcome Target #1: Working with the Social Security Administration and Vermont's AAA's and ADRC project, SHIP program staff will identify and contact the approximately 2000 individuals living in the state who are potentially eligible for the LIS and MSP programs.

Outcome Target #2: Working with the Vermont Center for Independent Living, the Social Security Administration, Vermont AARP and a host of other groups, we will insure that all Vermonters newly eligible for Medicare receive information and assistance regarding the LIS/MSP and SPAP programs.

Outcome Target #3: Vermont will increase the percentage of eligible individuals enrolled in the LIS and MSP programs to 99%.

Major Objectives	Key Tasks	Lead Person	Timeframe (Start and End Date by Month)												
			1	2	3	4	5	6	7	8	9	10	11	12	
	Year #1														
1. Outreach to existing Medicare beneficiaries.	1) Negotiate memorandum of understanding with SSA leadership.	SHIP Program Director	X	X											
	2) Prepare mailing for distribution by SSA.	SHIP/AAA/ADRC Staff			X	X									
	3) Tally reply cards from individuals who have received mailing.	SHIP/AAA/ADRC Staff					X	X	X						
	4) Follow up with those interested in pursuing LIS/MSP application.	SHIP Regional Coordinators					X	X	X	X	X	X	X	X	X
	5) Track number of completed applications submitted with SHIP, ADRC & AAA staff assistance.	SHIP Regional Coordinator & Program Director					X	X	X	X	X	X	X	X	X
	Year #2														
	1) Prepare mailing for distribution by SSA.	SHIP/AAA/ADRC Staff	X	X											
	2) Tally reply cards from individuals who have received mailing.	SHIP/AAA/ADRC Staff			X	X	X								
	3) Follow up with those interested in pursuing LIS/MSP application.	SHIP Regional Coordinators			X	X	X	X	X	X	X	X	X	X	X
	4) Track number of completed applications submitted with SHIP, ADRC & AAA staff assistance.	SHIP Regional Coordinator & Program Director			X	X	X	X	X	X	X	X	X	X	X

Attachment D: Project Work Plan, Objective #3 – Years 1 & 2

Major Objectives	Key Tasks	Lead Person	Timeframe (Start and End Date by Month)											
			1	2	3	4	5	6	7	8	9	10	11	12
	Year #1													
3. Increase % of eligible individuals enrolled in LIS & MSP programs to 99%.	1) Establish baseline data.	SHIP Program Director	X	X										
	2) Monitor enrollment percentages in the LIS & MSP programs using CMS/SSA data.	SHIP Program Director			X	X	X	X	X	X	X	X	X	X
	3) Adjust outreach strategies accordingly.	SHIP Program Director					X	X	X	X	X	X	X	X
	Year #2													
	1) Review year one data.	SHIP Program Director	X											
	2) Monitor enrollment percentages in the LIS & MSP programs using CMS/SSA data.	SHIP Program Director		X	X	X	X	X	X	X	X	X	X	X
	3) Adjust outreach strategies accordingly.	SHIP Program Director		X	X	X	X	X	X	X	X	X	X	X

Project Abstract

The grantee, a collaborative comprised of Vermont's Department of Disabilities, Aging and Independent Living, five Area Agencies on Aging, the Vermont State Health Insurance Assistance Program and the state's Aging and Disability Resource Connection project, is requesting funds for a 24 month initiative to help Vermonters with low and modest incomes pay for their prescription medication.

The goal of the project is to inform and assist new and existing Medicare beneficiaries who may be eligible for programs designed to help them pay for prescription drugs and other health insurance costs. The goal will be achieved by contacting beneficiaries who have not yet enrolled in these programs and offering them assistance to do so. Efforts will be also be made to contact individuals new to the Medicare program, and to work collaboratively with other community providers who may have contact with these individuals.

The objectives of the proposed project are: 1) to contact by mail the nearly 2000 Vermont residents who may be eligible for these programs, but who have not yet enrolled in them, and offer information and enrollment assistance; 2) to contact new Medicare beneficiaries to inform them of the availability of these programs and offer enrollment assistance; and 3) to increase the awareness of other community providers about these programs and to encourage them to refer consumers for enrollment assistance.

The expected outcomes of this project are: 1) to increase the enrollment of Medicare beneficiaries in the Low Income Subsidy and Medical Savings Program offered by the federal government to 99% of eligible residents in the state of Vermont; and 2) to increase participation rates in the State's Pharmacy Assistance Program.

The products from this project are: 1) an interim and final report; 2) a memorandum of understanding between the collaborative and the local field offices of the Social Security Administration; 3) a letter and reply card to be mailed to beneficiaries eligible for these programs; and 4) a data set reflecting the outcomes of the initiative.



State of Vermont
 Department of Finance & Management
 109 State Street, Pavilion Building
 Montpelier, VT 05620-0401

Agency of Administration

[phone] 802-828-2376
 [fax] 802-828-2428

**STATE OF VERMONT
 FINANCE & MANAGEMENT GRANT REVIEW FORM**

Grant Summary: This is a grant from the federal Department of Health and Human Services, Administration on Aging from their Medicare Enrollment Assistance Program. The purpose of this grant is to inform and assist new and existing Medicare beneficiaries enroll for federal programs to help them pay for prescription drugs. This may have the effect of reducing some pressure on the state's pharmacy program. If beneficiaries enroll in federally paid prescription programs, they may be less apt to rely on the state's Medicaid program for their prescription needs.

Date: 8/24/2009

Department: Department of Disabilities, Aging and Independent Living (DAIL)

Legal Title of Grant: Medicare enrollment Assistance Program

Federal Catalog #: 93.071

Grant/Donor Name and Address: DHHS Administration on Aging
 Office of Grants Management
 One Massachusetts Ave. NW Room 4772
 Washington, DC 20001

Grant Period: **From:** 6/1/2009 **To:** 5/31/2011

Grant/Donation: 38,026

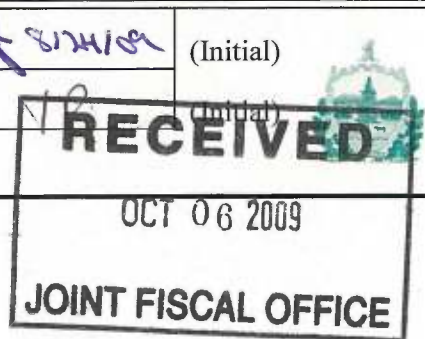
	SFY 1	SFY 2	SFY 3	Comments
Grant Amount:	\$23,000	\$15,026	\$	

Position Information:	# Positions	Explanation/Comments
	0	

Additional Comments:

This is grant funding which will be awarded to the current SHIP recipient, Northeast Kingdom Council on Aging, Inc. dba Northeastern Vermont Area Agency on Aging (NEVAA)

Department of Finance & Management (Initial)
 Secretary of Administration (Initial)



**STATE OF VERMONT
FINANCE & MANAGEMENT GRANT REVIEW FORM**

Sent To Joint Fiscal Office

Date

9/22/09



STATE OF VERMONT REQUEST FOR GRANT ACCEPTANCE (Form AA-1)

BASIC GRANT INFORMATION

1. Agency:	Agency of Human Services		
2. Department:	Department of Disabilities, Aging and Independent Living		
3. Program:	Medicare Improvements for Patients and Providers Act of 2008		
4. Legal Title of Grant:	Medicare enrollment Assistance Program		
5. Federal Catalog #:	93.071		
6. Grant/Donor Name and Address:	DHHS Administration on Aging, Office of Grants Management, One Massachusetts Ave., NW, Rm. 4772, Washington DC 20001		
7. Grant Period:	From:	6/1/2009	To: 5/31/2011
8. Purpose of Grant:	To inform and assist new and existing Medicare beneficiaries who may be eligible for programs to help them pay for prescription drugs, and other health insurance costs.		
9. Impact on existing program if grant is not Accepted:	Without this funding the efforts to connect with hard to reach individuals and groups likely to be eligible for low income subsidies and Medicare savings plans will be more difficult and eligible people may not receive health care.		

10. BUDGET INFORMATION

	SFY 1 FY 2010	SFY 2 FY 2011	SFY 3 FY	Comments
Expenditures:				
Personal Services	\$	\$	\$	
Operating Expenses	\$	\$	\$	
Grants	\$23,000	\$15,026	\$	
Total	\$23,000	\$15,026	\$	
Revenues:				
State Funds:				
Cash	\$	\$	\$	
In-Kind	\$	\$	\$	
Federal Funds:				
(Direct Costs)	\$23,000	\$15,026	\$	
(Statewide Indirect)	\$	\$	\$	
(Departmental Indirect)	\$	\$	\$	
Other Funds:				
Grant (source)	\$	\$	\$	
Total	\$23,000	\$15,026	\$	

Appropriation No:	3460020000	Amount:	\$23,000
			\$
			\$
			\$
			\$

JUL 14 2009



STATE OF VERMONT REQUEST FOR GRANT ACCEPTANCE (Form AA-1)

		\$
		\$
	Total	\$23,000

PERSONAL SERVICE INFORMATION

11. Will monies from this grant be used to fund one or more Personal Service Contracts? Yes No
 If "Yes", appointing authority must initial here to indicate intent to follow current competitive bidding process/policy.

Appointing Authority Name: _____ Agreed by: _____ (initial)

12. Limited Service Position Information:	# Positions	Title
Total Positions		

12a. Equipment and space for these positions: Is presently available. Can be obtained with available funds.

13. AUTHORIZATION AGENCY/DEPARTMENT

I/we certify that no funds beyond basic application preparation and filing costs have been expended or committed in anticipation of Joint Fiscal Committee approval of this grant, unless previous notification was made on Form AA-1PN (if applicable):

Signature: <i>Jean K Senechal</i>	Date: <i>7/1/09</i>
Title: DAIL Commissioner	
Signature: <i>Patricia Flood</i>	Date: <i>7/13/09</i>
Title: <i>DEPUTY SECRETARY</i>	

14. ACTION BY GOVERNOR

<input checked="" type="checkbox"/>	Check One Box: Accepted	<i>[Signature]</i>	<i>9/19/09</i>
<input type="checkbox"/>	Rejected	(Governor's signature)	Date:

15. SECRETARY OF ADMINISTRATION

<input checked="" type="checkbox"/>	Check One Box: Request to JFO		
<input type="checkbox"/>	Information to JFO	(Secretary's signature or designee) <i>Ta Bell</i>	Date: <i>9/14/09</i>

16. DOCUMENTATION REQUIRED


Required GRANT Documentation	
<input checked="" type="checkbox"/> Request Memo	<input type="checkbox"/> Notice of Donation (if any)
<input type="checkbox"/> Dept. project approval (if applicable)	<input checked="" type="checkbox"/> Grant (Project) Timeline (if applicable)
<input checked="" type="checkbox"/> Notice of Award	<input type="checkbox"/> Request for Extension (if applicable)
<input checked="" type="checkbox"/> Grant Agreement	<input type="checkbox"/> Form AA-1PN attached (if applicable)
<input checked="" type="checkbox"/> Grant Budget	

End Form AA-1



AGENCY OF HUMAN SERVICES
DEPARTMENT OF DISABILITIES, AGING AND INDEPENDENT LIVING

Commissioner's Office
103 South Main Street
Waterbury VT 05671-2301
Voice 241-2401/TTY 241-3557
Fax (802) 241-1363

TO: Grant Reviewers
FROM:  Joan K. Senecal, DAIL Commissioner
DATE: July 1, 2009
SUBJ: MIPPA Grant

Attached please find information regarding the Medicare Improvements for Patients and Providers Act awards (MIPPA) under CFDA # 93.071.

This MIPPA project is jointly funded by four awards that run concurrently. Two of the awards are funded by DHHS/AoA, CFDA # 93.071, for which approval is being requested and the other two are funded by DHHS/CMS, CFDA # 93.779, under which we currently have other awards.

The purpose of the project is to inform and assist new and existing Medicare beneficiaries who may be eligible for programs designed to help them pay for prescriptions drugs and other health insurance costs.

Grant funding will be awarded to the current SHIP subrecipient, Northeast Kingdom Council on Aging, Inc. dba Northeastern Vermont Area Agency on Aging (NEVAA).

Thank you for your consideration of this request.



Notice of Award

Medicare Improvements for Patients and Providers Act of 2008

Grantee:
Vermont Department Aging and Disabilities
Independent Living
Commissioner
103 S. Main St
Waterbury, VT 05671-2301

Date:
June 1, 2009

Grant No.: 09AAVTMIDR **Seq. No.:** 2009 / 1
Award Instrument: Grant (Mandatory)
Budget Period: 06/01/2009 - 05/31/2011

Award Authority: P.L. 110-275

EIN: 1-036000274-A6
DUNS: 809376155

CFDA Program Title	Award This Action	Cumulative Grant Award to Date	Appropriation	Object Class Code
93.071 Medicare Enrollment Assistance Program (Priority A.3 ADRC)	\$17,471	\$17,471	75-X-0142	41.15
Total	\$17,471	\$17,471		

Special Terms and Conditions:

- The terms and conditions of this Notice of Award and other requirements have the following order of precedence if there is any conflict in what they require: (1) the Medicare Improvements for Patients and Providers Act of 2008 (MIPPA); (2) other applicable Federal statutes and their implementing regulations; (3) program regulations; and (4) terms and conditions of award.
- This mandatory grant award is issued under the authority of the Medicare Improvements for Patients and Providers Act of 2008, Section 119, PL 110-275. By requesting or receiving funds under this award, the recipient assures that it will carry out the project/program described in its approved state plan(s) and will comply with the terms and conditions and other requirements of this award.
- This grant award is subject to the requirements applicable under the Medicare Improvements for Patients and Providers Act of 2008.
- This grant is subject to the requirements of the Uniform Administrative Requirement for Grants and Cooperative Agreements to State, Local, and Tribal Governments under Title 45 Code of Federal Regulations, Part 92.
- Funds will be available in two increments: (1) initial 50% of grant funds is available upon approval of the submitted project plan; (2) remaining funds will be available upon AoA and CMS acceptance of the first phase progress report and any modified plans due by March 1, 2010.
- A Financial Status Report (SF-269) is due annually. Reports are due within 90 days of the end of the first 12 months, and then within 90 days of the end of the 24 month period.

7. The first phase progress report is due 9 months after the project start date. The report should be sent no later than March 1, 2010 to CenterforBenefits@ncoa.org. A final report will be due at the end of the 24 month grant period. In addition, quarterly reports of the number of LIS and MSP applications completed should also be sent to CenterforBenefits@ncoa.org. The National Center on Benefits Outreach and Enrollment will provide training and technical assistance to MIPPA grantees.
8. At any phase of the grant period, deliver to the Administration on Aging (AoA) and the Centers for Medicare & Medicaid Services (CMS) upon request, any materials, systems or other items developed, refined, or enhanced under the grant award. The grantee agrees that AoA and CMS shall have royalty-free, nonexclusive, and irrevocable rights to reproduce, publish, or otherwise use and authorize others to use the items for Federal Government purposes.
9. On all new publications funded solely or in part by the MIPPA grant, the grantee shall include the express acknowledgement, "this publication has been created or produced by [the State] with financial assistance, in whole or in part, through a grant from the Administration on Aging and the Centers for Medicare & Medicaid Services. Grantees undertaking projects under government sponsorship are encouraged to express their findings and conclusions. These contents do not necessarily represent the policy of the U.S. Department of Health and Human Services and the grantee should not assume endorsement by the Federal Government." All SHIP grantees are expected to use the SHIP Logo and Tagline on all SHIP publications. (HHS Policy Statement: <http://www.hhs.gov/grantsnet/adminis/gpd/index.htm>).
10. AoA and CMS shall be notified of changes in program name, key personnel (State Official or Program Director), addresses, and telephone numbers immediately upon learning of the change, but not later than 30 days after a change in contact information. These changes include e-mail addresses, website URLs, State toll-free numbers, and any other significant administrative changes.

In accordance with the HHS Policy Statement, the grantee is required to notify both the AoA and CMS Grants Management Officers in writing if the Program Director specifically named in the Notice of Award (NoA) will withdraw from the project entirely, or be absent from the project during any continuous period of 3 months or more. AoA and CMS must approve any alternate arrangement proposed by the recipient, including any replacement of the Program Director or key personnel named in the NoA. http://www.hhs.gov/grantsnet/docs/HHSGPS_107.doc.

11. All records pertaining to the MIPPA grant shall be retained for a period of 3 years after notification of award closeout as set forth and described in 45 C.F.R. §92.42. Copies or other facsimiles of program records, such as electronic media, are acceptable substitutions for original documents.
12. In accordance with procedures contained in 45 C.F.R. §92.43, AoA and CMS may suspend or terminate the grant in whole or in part at any time before the date of expiration, whenever it determines that the grantee has materially failed to comply with the terms of the grant. AoA and CMS will promptly notify the grantee in writing of the determination and the reasons for the suspension or termination, the effective date of such action, and the opportunity for appeal.
13. Payment under this award will be made available through the HHS Departmental Payment System (PMS). PMS provides instructions for making withdrawals of Federal funds. Inquiries regarding payments should be directed to Program Support Center/Division of Payment Management (PSC/DPM), DHHS; Post Office Box 6021; Rockville, MD 20852; 1-877-614-5533; PMSSupport@psc.gov.

AoA Contact Information:

AoA Regional Administrator

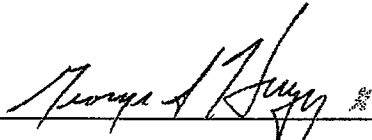
Name: Dan Quirk
Telephone: (212) 264-2976
E-mail: dan.quirk@aoa.hhs.gov

AoA Fiscal Award Administrator

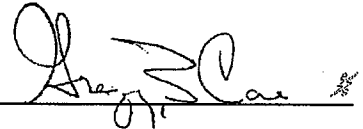
Name: Jerry Perlman
Telephone: (212) 264-4343
E-mail: jerry.perlman@aoa.hhs.gov



AoA Authorizing Official



Funds Certifying Official



AoA Grants Officer



Notice of Award

Medicare Improvements for Patients and Providers Act of 2008

Grantee:
Vermont
Vermont Department Aging and Disabilities
Commissioner
103 S. Main St
Waterbury, VT 05676

Date:
June 1, 2009

Grant No.: 09AAVTMIPP **Seq. No.:** 2009 / 1
Award Instrument: Grant (Mandatory)
Budget Period: 06/01/2009 - 05/31/2011

Award Authority: P.L. 110-275

EIN: 1-036000274-A6
DUNS: 809376155

CFDA Program Title	Award This Action	Cumulative Grant Award to Date	Appropriation	Object Class Code
93.071 Medicare Enrollment Assistance Program (Priority A.2 AAA)	\$20,555	\$20,555	75-X-0142	41.15
Total	\$20,555	\$20,555		

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- This grant is subject to the requirements of the Uniform Administrative Requirement for Grants and Cooperative Agreements to State, Local, and Tribal Governments under Title 45 Code of Federal Regulations, Part 92.
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10. AoA and CMS shall be notified of changes in program name, key personnel (State Official or Program Director), addresses, and telephone numbers immediately upon learning of the change, but not later than 30 days after a change in contact information. These changes include e-mail addresses, website URLs, State toll-free numbers, and any other significant administrative changes.

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11. All records pertaining to the MIPPA grant shall be retained for a period of 3 years after notification of award closeout as set forth and described in 45 C.F.R. §92.42. Copies or other facsimiles of program records, such as electronic media, are acceptable substitutions for original documents.
12. In accordance with procedures contained in 45 C.F.R. §92.43, AoA and CMS may suspend or terminate the grant in whole or in part at any time before the date of expiration, whenever it determines that the grantee has materially failed to comply with the terms of the grant. AoA and CMS will promptly notify the grantee in writing of the determination and the reasons for the suspension or termination, the effective date of such action, and the opportunity for appeal.
13. Payment under this award will be made available through the HHS Departmental Payment System (PMS). PMS provides instructions for making withdrawals of Federal funds. Inquiries regarding payments should be directed to Program Support Center/Division of Payment Management (PSC/DPM), DHHS; Post Office Box 6021; Rockville, MD 20852; 1-877-614-5533; PMSSupport@psc.gov.

AoA Contact Information:

AoA Regional Administrator

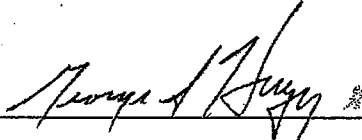
Name: Dan Quirk
Telephone: (212) 264-2976
E-mail: dan.quirk@aoa.hhs.gov

AoA Fiscal Award Administrator

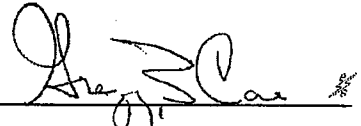
Name: Jerry Perlman
Telephone: (212) 264-4343
E-mail: jerry.perlman@aoa.hhs.gov



AoA Authorizing Official



Funds Certifying Official



AoA Grants Officer

SHIP/AAA/ADRC LIS/MSP Outreach Funds

Each funded entity is required to complete and separately respond to questions 1-10. The funded entities must jointly prepare a response for the four collaborative questions.

Please note the Department of Disabilities, Aging and Independent Living (DAIL) is applying for Priority A.1, A.2 and A.3 funding. DAIL operates its SHIP program in cooperation with Vermont's five Area Agencies on Aging (AAA), through a grant agreement with the Northeastern Vermont Area Agency on Aging (NEVAAA). Through this arrangement the NEVAAA provides statewide leadership for the SHIP and employs a SHIP Program Director, who oversees Regional SHIP program operations and supports five SHIP Program Coordinators who are employed by their local AAA. AAAs are key partners with DAIL, as well as other providers, in Vermont's Aging and Disability Resource Connections project. DAIL, AAAs and VT ADRC will be collaborating closely regarding LIS and MSP outreach.

1. Will all funds provided for LIS or MSP outreach and assistance efforts be used solely to support outreach and assistance efforts directed toward Medicare beneficiaries with limited incomes who may be eligible for LIS or MSP programs? (Yes or No – Note that an answer of Yes is required to be eligible for funding.)

Yes.

2. Will all activities described by the SHIP to reach people likely eligible for LIS or MSP programs be above and beyond those regular activities that the SHIP has planned in response to funding provided under the Basic SHIP Grant Award? (Yes or No – Note that an answer of Yes is required to be eligible for funding.) If yes, please describe how this supplemental funding will extend or enhance the LIS or MSP outreach and assistance efforts that you will provide in response to the Basic SHIP Grant Award funding.

Yes. Supplemental funding will allow us to continue our efforts to connect with hard-to-reach individuals and groups likely to be LIS or MSP eligible. With less total funding available to support the outreach and assistance functions of the SHIP program this year, these funds will allow us to continue our work with the Vermont Medicare Modernization Act (MMA) Task Force, a statewide work group created by the Vermont Legislature to assist Vermont beneficiaries. The Task Force's Outreach and Education sub-committee coordinates statewide efforts to educate Vermonters and their families about Medicare Part D and the Low Income Subsidy (LIS) program.

The Task Force includes more than 25 individuals representing a broad range of organizations including Area Agencies on Aging, the Vermont Aging and Disabilities Resource Connections (ADRC), the Vermont SHIP, the Vermont Department of Disabilities, Aging and Independent Living (DAIL), the Office of Vermont Health Access (OVHA), other state agencies, advocacy groups, the Social Security Administration (SSA) and the Centers for Medicare and Medicaid Services (CMS). Supplemental funding will allow us to focus our outreach efforts in two additional areas: 1) the remaining 2000 or so individuals in Vermont who are likely to be LIS/MSP

eligible but who have not registered for these programs; and 2) new beneficiaries likely to be LIS/MSP eligible.

3. Will your state use county and zip code specific data provided by CMS or AoA to target efforts related to reach beneficiaries who are likely eligible, but not enrolled for LIS, MSP or State Prescription Assistance Programs? If yes, please indicate how that data will be used to target the outreach and assistance efforts of the SHIP. If no, please indicate how the State will identify and target people who are likely eligible, but not enrolled for LIS, MSP, or SPAP programs?

Yes. Vermont is in the unique position of having enrolled over 98% of individuals eligible for the LIS/MSP programs in the state. The state's SHIP Program Director has relied upon county and zip code data provided by the Centers for Medicare and Medicaid Services and the Social Security Administration for at least a year to guide our outreach efforts, and will continue to do as we attempt to precisely identify and target the remaining individuals who have not enrolled in these programs.

A new data set being developed by the Vermont Division of Economic Services (Department for Children & Families) in response to recent changes in Vermont's Fuel Assistance and Supplemental Nutrition Assistance Program (SNAP) programs will be utilized to identify and target individuals who are likely eligible for LIS/MSP and the State Pharmacy Assistance Program.

4. How will the State use the funding to enhance or expand application assistance available in communities with beneficiaries who are likely eligible, but not enrolled for LIS or MSP programs? (Examples – recruiting and training counselors placed in low-income neighborhoods or communities, training community-based organizations that serve low-income beneficiaries to provide application assistance, establishing new local counseling sites in low-income communities, etc)

SHIP staff, working in conjunction with their AAA and ADRC colleagues, will enhance LIS/MSP/SPAP application assistance in Vermont communities by offering training and consultation to an expanded group of community partners as follows:

- a. We will integrate our work with outreach efforts being conducted by staff of the Office of Vermont Health Access (OVHA), the Bi-State Primary Care Association and other groups working to expand health care coverage to all Vermonters through the state's suite of Green Mountain Care programs.
- b. Program information and application assistance regarding the LIS/MSP/SPAP programs will be made available to all ten ADRC partners.
- c. As part of Vermont's "Blueprint for Health" program (a statewide effort to help avoid and manage chronic illness), "community care teams" have been established at three pilot sites around the state. Application assistance training and consultation will be offered to members of these teams by SHIP program staff.

- d. With the economic downturn, local Community Action Agencies have seen an influx of consumers seeking assistance for a wide variety of basic needs. Many of these individuals may be LIS/MSP/SPAP eligible. Application assistance training and consultation will be offered to members of these organizations by SHIP program staff.
 - e. Considerable efforts have been made in recent months to publicize the expansion of the state's Supplemental Nutrition Assistance Program (SNAP), known in Vermont at the "3SquaresVT" program. Eligibility guidelines have been expanded in order to help more consumers address the issue of food insecurity. Many of these individuals are also likely to be eligible for the LIS/MSP/SPAP programs. Application assistance training and consultation will be offered to Food Stamp Outreach Specialists working at the Area Agencies on Aging by SHIP program staff.
 - f. SHIP program volunteers, recruited as part of our collaboration with staff of the Health Assistance Partnership program, will be trained to provide information and application assistance through outreach efforts at senior centers, federally qualified health centers, libraries, churches, faith-based organizations and other community venues.
5. What specific activities will the State use to conduct outreach likely to persuade beneficiaries who are likely eligible, but not enrolled in LIS or MSP to apply for one or both of these programs? (Example – direct mail, outreach events, public and media activities, door-to-door outreach). Please be specific about the state outreach plan.
- a. The SHIP State Program Director has initiated negotiations with the leadership of the Social Security Administration here in Vermont to establish a Memorandum of Understanding with the three SSA field offices serving the state for the purposes of using the resources of both organizations to identify, target and assist potential LIS/MSP eligible individuals who have not yet enrolled in LIS/MSP. In order to preserve confidentiality between organizations, SHIP program staff will prepare direct mail pieces and forward them to SSA staff for mailing to beneficiaries potentially eligible for these programs.
 - b. Outreach to New Beneficiaries – AARP: SHIP Program staff will partner with the Vermont chapter of AARP to reach potential LIS/MSP eligible individuals reaching the age of Medicare eligibility. Many of these individuals are also family caregivers of older adults. Our outreach efforts will be targeted towards both those becoming eligible for Medicare as well as the older adults in their lives who may be LIS/MSP eligible.
 - c. Website Redesign: The Vermont SHIP Program has begun work on redesigning its website in order to make the information contained on the site more readily accessible to consumers. Links to information about the LIS/MSP/SPAP programs will be included.

- d. **Media Activities:** Vermont SHIP program staff will distribute press releases, make radio and television talk show appearances; and create radio public service announcements to promote the LIS/MSP programs.
- e. **Direct Messaging to Potential Beneficiaries:** Several state agencies send correspondence on a regular basis to potential LIS/MSP beneficiaries (e.g., fuel assistance notices, SNAP program updates, etc.) SHIP program staff will work with the state's Economic Services Division to explore the possibility of using these communications as a vehicle for informing potential beneficiaries about the opportunity to apply for the LIS/MSP/SPAP programs.
- f. **Elimination of SPAP:** Should Vermont's SPAP program be eliminated, as is currently being proposed, the state will likely engage in an extraordinary effort to educate beneficiaries about the options available to help pay for their prescription drug costs. SHIP program staff will monitor legislative activity on this front closely and, should the SPAP program be eliminated, utilize the public attention given to this issue to publicize the LIS/MSP program.
6. Will the State establish or expand partnerships that will enable the State to reach and/or provide application assistance to people who are likely eligible, but not enrolled in LIS or MSP programs? YES (Yes or No)

If Yes, what specific partnerships will the State establish or expand and what populations (described either geographically or demographically) will the partnership allow the State to reach? What specific activities will result from the partnership? [NOTE – THIS IS A POSSIBLE CHART]

Partner Organization	Population Served	Activities
Social Security Administration	Eligible beneficiaries not yet enrolled in LIS/MSP.	Direct mail/outreach targeting these individuals.
AARP – Vermont	Vermont residents over the age of 50.	Assistance with the dissemination of outreach materials with particular emphasis on new beneficiaries & family caregivers.
OVHA/Bi-State Primary Care	Individuals without health insurance coverage	Training/consultation regarding application assistance to outreach staff.
Aging & Disability Resource Connection	Elders & adults with disabilities. Expansion to individuals who have sustained brain injuries.	Training/consultation regarding application assistance to all ADRC member organizations.
Vermont Blueprint for Health – Community Care Teams	Adults with chronic health conditions & their families.	Training/consultation regarding application assistance to care team members.
Community Action Agencies	Low-income individuals.	Training/consultation regarding application assistance to outreach staff.

Food Stamp Outreach Specialists – Area Agencies on Aging	SNAP eligible beneficiaries and their families.	Training/consultation regarding application assistance to outreach staff.
Vermont Center for Independent Living	Disabled youth and adults living in Vermont	Training/consultation regarding application assistance to outreach staff.
Vermont 211	Statewide information, referral and assistance program for Vermont residents.	Training/consultation regarding application assistance to outreach staff.
Vermont Department of Labor	Displaced workers and their families	Training/consultation regarding application assistance to outreach staff.
Chamber of Commerce	Displaced workers and their families	Training/consultation regarding application assistance to outreach staff.

6A: Where applicable, how will the state coordinate with the Native American programs on LIS, MSPs and Part D outreach? – Not applicable

SHIP/AAA/ADRC Rural Part D Outreach Funds

7. Will all funds provided for rural outreach to Part D eligible Medicare beneficiaries be used to reach and assist people who live in rural areas and who are eligible for Medicare Part D? (Yes or No – Note that an answer of Yes is required to be eligible for funding.)

Yes. The entire catchment area has been classified as “rural” by the AOA.

8. Will all the activities described by the State to reach people Part D eligible Medicare beneficiaries in rural areas be above and beyond those regular activities that the State has planned in response to other funding, e.g. Basic SHIP Grant Award or OAA Outreach? (Yes or No – Note that an answer of Yes is required to be eligible for funding.)

Yes.

9. What specific activities will the State use to conduct outreach likely to reach beneficiaries living in rural areas with information about Medicare Part D coverage and the associated LIS/MSP programs for beneficiaries with limited incomes? (Example – direct mail, outreach events, public and media activities)

a. The SHIP State Program Director has initiated negotiations with the leadership of the Social Security Administration here in Vermont to establish a Memorandum of Understanding with the three SSA field offices serving the state for the purposes of using the resources of both organizations to identify, target and assist potential LIS/MSP eligible individuals who have not yet enrolled in LIS/MSP. In order to preserve confidentiality between organizations, SHIP program staff will prepare direct mail pieces and forward them to SSA staff for mailing to beneficiaries potentially eligible for these programs.

b. Outreach to New Beneficiaries – AARP: SHIP Program staff will partner with the Vermont chapter of AARP to reach potential LIS/MSP eligible individuals reaching

the age of Medicare eligibility. Many of these individuals are also family caregivers of older adults. Our outreach efforts will be targeted towards both those becoming eligible for Medicare as well as the older adults in their lives who may be LIS/MSP eligible.

- c. Website Redesign: The Vermont SHIP Program has begun work on redesigning its website in order to make the information contained on the site more readily accessible to consumers. Links to information about the LIS/MSP/SPAP programs will be included.
 - d. Media Activities: Vermont SHIP program staff will distribute press releases, make radio and television talk show appearances; and create radio public service announcements to promote the LIS/MSP programs.
 - e. Direct Messaging to Potential Beneficiaries: Several state agencies send correspondence on a regular basis to potential LIS/MSP beneficiaries (e.g., fuel assistance notices, SNAP program updates, etc.) SHIP program staff will work with the state's Economic Services Division to explore the possibility of using these communications as a vehicle for informing potential beneficiaries about the opportunity to apply for the LIS/MSP/SPAP programs.
 - f. Elimination of SPAP: Should Vermont's SPAP program be eliminated, as is currently being proposed, the state will likely engage in an extraordinary effort to educate beneficiaries about the options available to help pay for their prescription drug costs. SHIP program staff will monitor legislative activity on this front closely and, should the SPAP program be eliminated, utilize the public attention given to this issue to publicize the LIS/MSP program.
10. How will the State use the funding to enhance or expand application assistance available in rural areas of the state? (Examples – recruiting and training counselors deployed to serve rural areas, training community-based organizations that serve beneficiaries living in rural areas, establishing new local counseling sites in rural areas, etc)

SHIP staff, working in conjunction with their AAA and ADRC colleagues, will enhance LIS/MSP/SPAP application assistance in Vermont communities by offering training and consultation to an expanded group of community partners as follows:

- a. We will integrate our work with outreach efforts being conducted by staff of the Office of Vermont Health Access (OVHA), the Bi-State Primary Care Association and other groups working to expand health care coverage to all Vermonters through the state's suite of Green Mountain Care programs.
- b. Program information and application assistance regarding the LIS/MSP/SPAP programs will be made available to all ADRC partners.

- c. As part of Vermont's "Blueprint for Health" program (a statewide effort to help avoid and manage chronic illness), "community care teams" have been established at three pilot sites around the state. Application assistance training and consultation will be offered to members of these teams by SHIP program staff.
- d. With the economic downturn, local Community Action Agencies have seen an influx of consumers seeking assistance for a wide variety of basic needs. Many of these individuals may be LIS/MSP/SPAP eligible. Application assistance training and consultation will be offered to members of these organizations by SHIP program staff.
- e. Considerable efforts have been made in recent months to publicize the expansion of the state's Supplemental Nutrition Assistance Program (SNAP), known in Vermont at the "3SquaresVT" program. Eligibility guidelines have been expanded in order to help more consumers address the issue of food insecurity. Many of these individuals are also likely to be eligible for the LIS/MSP/SPAP programs. Application assistance training and consultation will be offered to Food Stamp Outreach Specialists working at the Area Agencies on Aging by SHIP program staff.
- f. SHIP program volunteers, recruited as part of our collaboration with staff of the Health Assistance Partnership program, will be trained to provide information and application assistance through outreach efforts at senior centers, federally qualified health centers, libraries, churches, faith-based organizations and other community venues.

State Questions – Collaborative Efforts

1. What are the quantifiable outcome targets of the collaborative efforts of the SHIP, AAAs and ADRCs to reach and provide application assistance to beneficiaries who are likely eligible, but not enrolled in LIS, MSP and/or Part D programs and how will the effort be measured? For example, the State may propose to generate a target number of applications for these programs and track those applications through a specific data system or tool. Please do not state the targets in terms of a number of outreach events or counseling sessions, but rather in terms of a number of applications submitted or another quantifiable target that will demonstrate progress in getting more beneficiaries enrolled in these programs.

Outcome Target #1: Working with the Social Security Administration and Vermont's AAA's and ADRC project, SHIP program staff will identify and contact the approximately 2000 individuals living in the state who are potentially eligible for the LIS and MSP programs.

Outcome Target #2: Working with the Vermont Center for Independent Living, the Social Security Administration, Vermont AARP, the state's Economic Services Division and an expanded roster of community-based groups, we will insure that all Vermonters

newly eligible for Medicare receive information and assistance regarding the LIS/MSP and SPAP programs.

Outcome Target #3: Vermont will increase the percentage of eligible individuals enrolled in the LIS and MSP programs to 99%.

2. How will the State measure and report progress toward the stated outcome target?

Outcome Target #1: 1) Confirm mailing of letters by SSA to the approximately 2000 individuals who are eligible but not enrolled in LIS/MSP; 2) Tally reply cards from individuals who have received mailing; 3) Follow up with those individuals interested in pursuing LIS/MSP application; 4) Track number of completed applications submitted with SHIP/ADRC/AAA staff assistance.

Outcome Target #2: 1) Document current methods by which new Medicare enrollees learn of LIS/MSP and SPAP programs; 2) Perform gap analysis; 3) Identify new strategies for outreach to eligible but not enrolled individuals; 4) Implement new strategies and track consumer response via applications.

Outcome Target #3: 1) Relying upon CMS and OVHA data, monitor enrollment percentages in the LIS/MSP and SPAP programs.

3. What specific work plan will the state utilize to coordinate the efforts of the SHIP, AAAs and ADRC that are funded under this program to assure that work is collaborative, that resources of the programs are leveraged to provide maximum effectiveness, and that work is not duplicative? [NOTE – THIS MAY BE A 250-WORD ANSWER.]

Because each regional SHIP program in Vermont is housed within an Area Agency on Aging, program staff works closely with their AAA and ADRC colleagues, as well as other community-based groups outside the aging network. SHIP program staff also serves as Vermont Senior Medicare Patrol (SMP) program coordinators for their region, and work closely with the Community of Vermont Elders (COVE) and other state and local agencies that hold membership in the Vermont Medicare Modernization Act (MMA) Task Force, a statewide work group created by the Vermont Legislature to assist Vermont Medicare beneficiaries. The Task Force's Outreach and Education sub-committee coordinates statewide efforts to educate Vermonters and their families about Medicare Part D, the LIS/MSP programs and other related services. MMA Task Force members include the Vermont Department of Disabilities, Aging and Independent Living (DAIL), the Vermont SHIP, the Office of Vermont Health Access (OVHA), other state agencies, advocacy groups, the Social Security Administration and CMS.

At the state level, oversight of the SHIP, AAA and ADRC programs is centralized within the Department of Disabilities, Aging and Independent Living and overseen by core staff working within the State Unit on Aging. Staff has strong working relationships across state government that helps support service coordination, minimizes duplication of effort and maximizes the return on dollars invested in these programs.

At the local level, SHIP staff and their AAA and ADRC colleagues develop and maintain important relationships with a diversity of local stakeholders including pharmacists, mental health and primary care providers, hospital business office representatives, low-income advocates, and individuals representing many other groups.

4. Please provide a timeline for the 24 month duration of this grant that will outline the planned activities of the SHIP, AAA, and ADRC programs and the anticipated progress toward achieving the goal the State outlined in response to Question 1 of this section.

Attachment B: Budget Narrative

Revised to reflect spending of grant award only

Object Class Category	Federal Funds	Non-Federal Cash	Non-Federal In-Kind	TOTAL	Justification
Personnel	\$2,395	\$0	\$0	\$2,395	Health Insurance Info Specialist – 1 hours/week @ \$14.84/hour Administrative Assistant – .6 hours/week @\$13.65/hour
Fringe Benefits	\$790	\$0	\$0	\$790	Includes FICA, Workers' Comp., Health Insurance, Unemployment Compensation, Pension
Travel	\$0	\$0	\$0	\$0	None Requested
Equipment	\$0	\$0	\$0	\$0	No equipment requested
Supplies	\$1,046	\$0	\$0	\$1,046	Materials for outreach effort/ mailing/postage
Contractual	\$30,979	\$0	\$0	\$30,979	Subcontracts - Area Agencies on Aging (4)
Other	\$0	\$0	\$0	\$0	
Indirect Charges	\$2,816	\$0	\$0	\$2,816	Federal limited to 8% of direct costs
TOTAL	\$38,026	\$0	\$0	\$38,026	

Attachment B: Budget Narrative

Object Class Category	Federal Funds	Non-Federal Cash	Non-Federal In-Kind	TOTAL	Justification
Personnel	\$5,216	\$0	\$0	\$5,216	Health Insurance Info Specialist – 2 hours/week @ \$14.84/hour Administrative Assistant – 1.5 hours/week @\$13.65/hour
Fringe Benefits	\$1,721	\$0	\$0	\$1,721	Includes FICA, Workers' Comp., Health Insurance, Unemployment Compensation, Pension
Travel	\$0	\$0	\$0	\$0	None Requested
Equipment	\$0	\$0	\$0	\$0	No equipment requested
Supplies	\$2,359	\$0	\$0	\$2,359	Materials for outreach effort/mailing/postage
Contractual	\$66,662	\$0	\$0	\$66,662	Subcontracts - Area Agencies on Aging (4)
Other	\$0	\$0	\$0	\$0	
Indirect Charges	\$6,077	\$0	\$13,878	\$19,955	Federal limited to 8% of direct costs
TOTAL	\$82,035	\$0	\$13,878	\$95,913	

Attachment D: Project Work Plan, Objective #1 – Years 1 & 2

Goal: Expand the number of eligible individuals enrolled in Low Income Subsidy, Medicare Savings Plan and Vermont's State Pharmacy Assistance Program.

Measurable Outcome(s):

Outcome Target #1: Working with the Social Security Administration and Vermont's AAA's and ADRC project, SHIP program staff will identify and contact the approximately 2000 individuals living in the state who are potentially eligible for the LIS and MSP programs.

Outcome Target #2: Working with the Vermont Center for Independent Living, the Social Security Administration, Vermont AARP and a host of other groups, we will insure that all Vermonters newly eligible for Medicare receive information and assistance regarding the LIS/MSP and SPAP programs.

Outcome Target #3: Vermont will increase the percentage of eligible individuals enrolled in the LIS and MSP programs to 99%.

Major Objectives	Key Tasks	Lead Person	Timeframe (Start and End Date by Month)											
			1	2	3	4	5	6	7	8	9	10	11	12
	Year #1													
1. Outreach to existing Medicare beneficiaries.	1) Negotiate memorandum of understanding with SSA leadership.	SHIP Program Director	X	X										
	2) Prepare mailing for distribution by SSA.	SHIP/AAA/ADRC Staff			X	X								
	3) Tally reply cards from individuals who have received mailing.	SHIP/AAA/ADRC Staff					X	X	X					
	4) Follow up with those interested in pursuing LIS/MSP application.	SHIP Regional Coordinators					X	X	X	X	X	X	X	X
	5) Track number of completed applications submitted with SHIP, ADRC & AAA staff assistance.	SHIP Regional Coordinator & Program Director					X	X	X	X	X	X	X	X
	Year #2													
	1) Prepare mailing for distribution by SSA.	SHIP/AAA/ADRC Staff	X	X										
	2) Tally reply cards from individuals who have received mailing.	SHIP/AAA/ADRC Staff			X	X	X							
	3) Follow up with those interested in pursuing LIS/MSP application.	SHIP Regional Coordinators			X	X	X	X	X	X	X	X	X	X
	4) Track number of completed applications submitted with SHIP, ADRC & AAA staff assistance.	SHIP Regional Coordinator & Program Director			X	X	X	X	X	X	X	X	X	X

Attachment D: Project Work Plan, Objective #2 – Years 1 & 2

Major Objectives	Key Tasks	Lead Person	Timeframe (Start and End Date by Month)												
			1	2	3	4	5	6	7	8	9	10	11	12	
	Year #1														
2. Outreach to new Medicare beneficiaries.	1) Document current methods by which new Medicare enrollees learn of LIS/MSP and SPAP programs.	SHIP/AAA/ADRC Staff	X	X											
	2) Perform gap analysis.	SHIP Program Director		X	X	X									
	3) Identify new strategies for outreach to eligible but not enrolled individuals.	SHIP/AAA/ADRC Staff & Community Partners				X	X	X							
	4) Implement new strategies and track consumer response via applications.	SHIP/AAA/ADRC Staff								X	X	X	X	X	X
	Year #2														
	1) Review existing strategies /develop new strategies for outreach to eligible but not enrolled individuals.	SHIP/AAA/ADRC Staff & Community Partners	X	X											
	2) Implement new strategies and track consumer response via applications.	SHIP/AAA/ADRC Staff			X	X	X	X	X	X	X	X	X	X	X

Attachment D: Project Work Plan, Objective #3 – Years 1 & 2

Major Objectives	Key Tasks	Lead Person	Timeframe (Start and End Date by Month)											
			Year #1											
			1	2	3	4	5	6	7	8	9	10	11	12
3. Increase % of eligible individuals enrolled in LIS & MSP programs to 99%.	1) Establish baseline data.	SHIP Program Director	x	x										
	2) Monitor enrollment percentages in the LIS & MSP programs using CMS/SSA data.	SHIP Program Director			x	x	x	x	x	X	x	x	x	x
	3) Adjust outreach strategies accordingly.	SHIP Program Director					x	x	x	X	x	x	x	x
	Year #2													
	1) Review year one data.	SHIP Program Director	x											
	2) Monitor enrollment percentages in the LIS & MSP programs using CMS/SSA data.	SHIP Program Director		x	x	x	x	x	x	X	x	x	x	x
	3) Adjust outreach strategies accordingly.	SHIP Program Director		x	x	x	x	x	x	x	x	x	x	x

Project Abstract

The grantee, a collaborative comprised of Vermont's Department of Disabilities, Aging and Independent Living, five Area Agencies on Aging, the Vermont State Health Insurance Assistance Program and the state's Aging and Disability Resource Connection project, is requesting funds for a 24 month initiative to help Vermonters with low and modest incomes pay for their prescription medication.

The goal of the project is to inform and assist new and existing Medicare beneficiaries who may be eligible for programs designed to help them pay for prescription drugs and other health insurance costs. The goal will be achieved by contacting beneficiaries who have not yet enrolled in these programs and offering them assistance to do so. Efforts will be also be made to contact individuals new to the Medicare program, and to work collaboratively with other community providers who may have contact with these individuals.

The objectives of the proposed project are: 1) to contact by mail the nearly 2000 Vermont residents who may be eligible for these programs, but who have not yet enrolled in them, and offer information and enrollment assistance; 2) to contact new Medicare beneficiaries to inform them of the availability of these programs and offer enrollment assistance; and 3) to increase the awareness of other community providers about these programs and to encourage them to refer consumers for enrollment assistance.

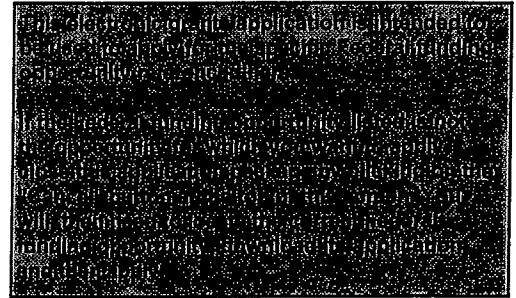
The expected outcomes of this project are: 1) to increase the enrollment of Medicare beneficiaries in the Low Income Subsidy and Medical Savings Program offered by the federal government to 99% of eligible residents in the state of Vermont; and 2) to increase participation rates in the State's Pharmacy Assistance Program.

The products from this project are: 1) an interim and final report; 2) a memorandum of understanding between the collaborative and the local field offices of the Social Security Administration; 3) a letter and reply card to be mailed to beneficiaries eligible for these programs; and 4) a data set reflecting the outcomes of the initiative.

Rec'd 6/16/09
from Veda

Xha MIPIA

Opportunity Title:	Medicare Beneficiary Outreach and Assistance Program
Offering Agency:	Administration on Aging
CFDA Number:	93.071
CFDA Description:	Medicare Enrollment Assistance Program
Opportunity Number:	HHS-2009-AOA-MI-0903
Competition ID:	
Opportunity Open Date:	01/16/2009
Opportunity Close Date:	03/16/2009
Agency Contact:	Mimi Toomey E-mail: Mimi.Toomey@aoa.hhs.gov Phone: 202-357-0141



This opportunity is only open to organizations, applicants who are submitting grant applications on behalf of a company, state, local or tribal government, academia, or other type of organization.

* Application Filing Name: VT Department of Disabilities, Aging &

Mandatory Documents

Move Form to Complete

Move Form to Delete

Mandatory Documents for Submission

SF424 Mandatory Form
Other Attachments Form
Project Narrative Attachment Form
Grants.gov Lobbying Form
Budget Narrative Attachment Form
Budget Information for Non-Construction Program

Optional Documents

Disclosure of Lobbying Activities (SF-LLL)
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Move Form to Submission List

Move Form to Delete

Optional Documents for Submission

Instructions

1. Enter a name for the application in the Application Filing Name field.
 - This application can be completed in its entirety offline; however, you will need to login to the Grants.gov website during the submission process.
 - You can save your application at any time by clicking the "Save" button at the top of your screen.
 - The "Save & Submit" button will not be functional until all required data fields in the application are completed and you clicked on the "Check Package for Errors" button and confirmed all data required data fields are completed.
2. Open and complete all of the documents listed in the "Mandatory Documents" box. Complete the SF-424 form first.
 - It is recommended that the SF-424 form be the first form completed for the application package. Data entered on the SF-424 will populate data fields in other mandatory and optional forms and the user cannot enter data in these fields.
 - The forms listed in the "Mandatory Documents" box and "Optional Documents" may be predefined forms, such as SF-424, forms where a document needs to be attached, such as the Project Narrative or a combination of both. "Mandatory Documents" are required for this application. "Optional Documents" can be used to provide additional support for this application or may be required for specific types of grant activity. Reference the application package instructions for more information regarding "Optional Documents".
 - To open and complete a form, simply click on the form's name to select the item and then click on the => button. This will move the document to the appropriate "Documents for Submission" box and the form will be automatically added to your application package. To view the form, scroll down the screen or select the form name and click on the "Open Form" button to begin completing the required data fields. To remove a form/document from the "Documents for Submission" box, click the document name to select it, and then click the <= button. This will return the form/document to the "Mandatory Documents" or "Optional Documents" box.
 - All documents listed in the "Mandatory Documents" box must be moved to the "Mandatory Documents for Submission" box. When you open a required form, the fields which must be completed are highlighted in yellow with a red border. Optional fields and completed fields are displayed in white. If you enter invalid or incomplete information in a field, you will receive an error message.
3. Click the "Save & Submit" button to submit your application to Grants.gov.
 - Once you have properly completed all required documents and attached any required or optional documentation, save the completed application by clicking on the "Save" button.
 - Click on the "Check Package for Errors" button to ensure that you have completed all required data fields. Correct any errors or if none are found, save the application package.
 - The "Save & Submit" button will become active; click on the "Save & Submit" button to begin the application submission process.
 - You will be taken to the applicant login page to enter your Grants.gov username and password. Follow all onscreen instructions for submission.

APPLICATION FOR FEDERAL ASSISTANCE SF-424 - MANDATORY

* 1.a. Type of Submission: <input checked="" type="checkbox"/> Application <input type="checkbox"/> Plan <input type="checkbox"/> Funding Request <input type="checkbox"/> Other * Other (specify) <input style="width:100%; height:20px;" type="text"/>	* 1.b. Frequency: <input checked="" type="checkbox"/> Annual <input type="checkbox"/> Quarterly <input type="checkbox"/> Other * Other (specify) <input style="width:100%; height:20px;" type="text"/>	* 1.d. Version: <input checked="" type="checkbox"/> Initial <input type="checkbox"/> Resubmission <input type="checkbox"/> Revision <input type="checkbox"/> Update * 2. Date Received: <input style="width:100%; height:20px;" type="text"/> Completed by Grants.gov upon submission. 3. Applicant Identifier: <input style="width:100%; height:20px;" type="text"/> 4a. Federal Entity Identifier: <input style="width:100%; height:20px;" type="text"/> 4b. Federal Award Identifier: <input style="width:100%; height:20px;" type="text"/>	STATE USE ONLY: 5. Date Received by State: <input style="width:100%; height:20px;" type="text"/> 6. State Application Identifier: <input style="width:100%; height:20px;" type="text"/>
1.c. Consolidated Application/Plan/Funding Request? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> <input style="width:50px; height:15px;" type="text"/> Explanation			

7. APPLICANT INFORMATION:

* a. Legal Name: <input style="width:100%; height:20px;" type="text"/> VT Department of Disabilities, Aging & Independent Living	
* b. Employer/Taxpayer Identification Number (EIN/TIN): <input style="width:100%; height:20px;" type="text"/> 03-6000264	* c. Organizational DUNS: <input style="width:100%; height:20px;" type="text"/> 809376155
d. Address:	
* Street1: <input style="width:100%; height:20px;" type="text"/> 103 South Main Street	Street2: <input style="width:100%; height:20px;" type="text"/>
* City: <input style="width:100%; height:20px;" type="text"/> Waterbury	County: <input style="width:100%; height:20px;" type="text"/>
* State: <input style="width:100%; height:20px;" type="text"/> VT: Vermont	Province: <input style="width:100%; height:20px;" type="text"/>
* Country: <input style="width:100%; height:20px;" type="text"/> USA: UNITED STATES	* Zip / Postal Code: <input style="width:100%; height:20px;" type="text"/> 05671-1601

e. Organizational Unit:	
Department Name: <input style="width:100%; height:20px;" type="text"/>	Division Name: <input style="width:100%; height:20px;" type="text"/>

f. Name and contact information of person to be contacted on matters involving this submission:		
Prefix: <input style="width:100%; height:20px;" type="text"/> Ms.	* First Name: <input style="width:100%; height:20px;" type="text"/> Marie	Middle Name: <input style="width:100%; height:20px;" type="text"/>
* Last Name: <input style="width:100%; height:20px;" type="text"/> Bean		Suffix: <input style="width:100%; height:20px;" type="text"/>
Title: <input style="width:100%; height:20px;" type="text"/> Interim Community Development Manager		

Organizational Affiliation: <input style="width:100%; height:20px;" type="text"/> VT Department of Disabilities, Aging and Independent Living	
* Telephone Number: <input style="width:100%; height:20px;" type="text"/> 802-241-4425	Fax Number: <input style="width:100%; height:20px;" type="text"/>
* Email: <input style="width:100%; height:20px;" type="text"/> Marie.Bean@ahs.state.vt.us	

APPLICATION FOR FEDERAL ASSISTANCE SF-424 - MANDATORY

Version 01.1

*** 8a. TYPE OF APPLICANT:**

A: State Government

*** Other (specify):**

b. Additional Description:

*** 9. Name of Federal Agency:**

Administration on Aging

10. Catalog of Federal Domestic Assistance Number:

93.071

CFDA Title:

Medicare Enrollment Assistance Program

11. Areas Affected by Funding:

State of Vermont

12. CONGRESSIONAL DISTRICTS OF:

*** a. Applicant:**

1

b. Program/Project:

VT

Attach an additional list of Program/Project Congressional Districts if needed.

Add Attachment

Delete Attachment

View Attachment

13. FUNDING PERIOD:

a. Start Date:

06/01/2009

b. End Date:

05/31/2011

14. ESTIMATED FUNDING:

*** a. Federal (\$):**

82,035.00

b. Match (\$):

*** 15. IS SUBMISSION SUBJECT TO REVIEW BY STATE UNDER EXECUTIVE ORDER 12372 PROCESS?**

a. This submission was made available to the State under the Executive Order 12372 Process for review on:

b. Program is subject to E.O. 12372 but has not been selected by State for review.

c. Program is not covered by E.O. 12372.

APPLICATION FOR FEDERAL ASSISTANCE SF-424 - MANDATORY

Version 01.1

*** 16. Is The Applicant Delinquent On Any Federal Debt?**

Yes No

Explanation:

17. By signing this application, I certify (1) to the statements contained in the list of certifications and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances** and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 218, Section 1001)**

** I Agree

** This list of certifications and assurances, or an internet site where you may obtain this list, is contained in the announcement or agency specific instructions.

Authorized Representative:

Prefix:

Ms.

* First Name:

Camille

Middle Name:

* Last Name:

George

Suffix:

* Title:

Director, VT State Unit on Aging

Organizational Affiliation:

* Telephone Number:

802-241-2427

* Fax Number:

802-241-4224

* Email:

Camille.George@ahs.state.vt.us

* Signature of Authorized Representative:

Completed by Grants.gov upon submission.

* Date Signed:

Completed by Grants.gov upon submission.

Attach supporting documents as specified in agency instructions.

Add Attachments

Delete Attachments

View Attachments

APPLICATION FOR FEDERAL ASSISTANCE SF-424 - MANDATORY

* Consolidate Application/Plan/Funding Request Explanation

[Empty box for application content]

APPLICATION FOR FEDERAL ASSISTANCE SF-424 - MANDATORY

*** Applicant Federal Debt Delinquent Explanation**

[Empty text area for explanation]

CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans, and Cooperative Agreements

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Statement for Loan Guarantees and Loan Insurance

The undersigned states, to the best of his or her knowledge and belief, that:

If any funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this commitment providing for the United States to insure or guarantee a loan, the undersigned shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions. Submission of this statement is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required statement shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

* APPLICANT'S ORGANIZATION		
VT Department of Disabilities, Aging & Independent Living		
* PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE		
Prefix: Ms.	* First Name: Camille	Middle Name:
* Last Name: George	Suffix:	
* Title: Director, VT State Unit on Aging		
* SIGNATURE: Completed on submission to Grants.gov	* DATE: Completed on submission to Grants.gov	

Other Attachment File(s)

* Mandatory Other Attachment Filename:

To add more "Other Attachment" attachments, please use the attachment buttons below.

Attached at least one Optional Other Attachment?:

Project Narrative File(s)

* Mandatory Project Narrative File Filename:

To add more Project Narrative File attachments, please use the attachment buttons below.

Attached at least one Optional Project Narrative File?:

Budget Narrative File(s)

* Mandatory Budget Narrative Filename:

To add more Budget Narrative attachments, please use the attachment buttons below.

BUDGET INFORMATION - Non-Construction Programs

OMB Approval No. 4040-0006
Expiration Date 07/30/2010

SECTION A - BUDGET SUMMARY

Grant Program Function or Activity (a)	Catalog of Federal Domestic Assistance Number (b)	Estimated Unobligated Funds		New or Revised Budget		
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	Total (g)
1. MIPPA	93.071	\$ 82,035.00	\$	\$	\$	\$ 82,035.00
2.						
3.						
4.						
5. Totals		\$ 82,035.00	\$	\$	\$	\$ 82,035.00

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	GRANT PROGRAM, FUNCTION OR ACTIVITY				Total (5)
	(1)	(2)	(3)	(4)	
	MIPPA				
a. Personnel	\$	\$	\$	\$	\$
b. Fringe Benefits					
c. Travel					
d. Equipment					
e. Supplies					
f. Contractual	75,958.00				75,958.00
g. Construction					
h. Other					
i. Total Direct Charges (sum of 6a-6h)	75,958.00				\$ 75,958.00
j. Indirect Charges	6,077.00				\$ 6,077.00
k. TOTALS (sum of 6i and 6j)	\$ 82,035.00	\$	\$	\$	\$ 82,035.00
7. Program Income	\$	\$	\$	\$	\$

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SECTION C - NON-FEDERAL RESOURCES				
(a) Grant Program	(b) Applicant	(c) State	(d) Other Sources	(e)TOTALS
8. MIPPA	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
9.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
10.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
11.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
12. TOTAL (sum of lines 8-11)	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

SECTION D - FORECASTED CASH NEEDS					
	Total for 1st Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
13. Federal	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
14. Non-Federal	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
15. TOTAL (sum of lines 13 and 14)	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

SECTION E - BUDGET ESTIMATES OF FEDERAL FUNDS NEEDED FOR BALANCE OF THE PROJECT				
(a) Grant Program	FUTURE FUNDING PERIODS (YEARS)			
	(b)First	(c) Second	(d) Third	(e) Fourth
16. MIPPA	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>
17.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
18.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
19.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
20. TOTAL (sum of lines 16 - 19)	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>

SECTION F - OTHER BUDGET INFORMATION	
21. Direct Charges: <input type="text"/>	22. Indirect Charges: <input type="text"/>
23. Remarks: <input type="text"/>	