

# Statewide Health Insurance Benefits Advisors (SHIBA) Annual Report

Serving people with Medicare for more than 40 years.



OFFICE of the  
**INSURANCE  
COMMISSIONER**  
WASHINGTON STATE



# Thank you!

**Tim Smolen, SHIBA Program Manager**

I'd like to say "thank you" to the many people and organizations who support our important work in the SHIBA program.

First and foremost, our many volunteers – especially those who counsel Medicare beneficiaries about their insurance options. Ultimately, our vision can only be realized through the efforts of our volunteers.

Our organizational partners in local communities. We depend on you to help recruit, interview, train, support and recognize our volunteers. Dedicated professionals in these sponsor and other community-based non-profit organizations also advise Medicare beneficiaries, and contribute to our mission of reaching those in need through education and outreach.

The contractors who support our work with specialized services, including print, radio and social media.

The partners who fund our work – the Administration for Community Living and Insurance Commissioner Mike Kreidler.

Our colleagues in federal, state and local agencies whose work intersects with ours in countless ways. Our volunteers and the partner organizations with whom we contract rely on these colleagues for support every day. The complexity of the Medicare program itself is daunting. When we consider the constellation of related insurance and health care and social welfare programs that we also help our clients to navigate, it's mind-boggling. It's only because there are so many dedicated, kind-hearted people who give so generously to help others that we can succeed.

Thank you!

## Our mission

SHIBA provides free, unbiased information about health care coverage and access to help improve the lives of all Washington state residents. We cultivate community commitment through partnership, service and volunteering.



## Introduction

In preparing this 2020-21 annual report, we look back on a year that was like one we'd never witnessed. Despite the global pandemic and its disruption to communities worldwide, we continued to provide services – even when there were hurdles – big or small – along the way.

This past year has also shown everything around us changed. As a result, we must continue to find new ways to reach out and connect with people.

Through all the changes the pandemic brought this past year, we also had many wins. So, let's celebrate our efforts and achievements, propelling us into the year ahead and come back even stronger and brighter.

## Year at a glance

July 1, 2020 - June 30, 2021

Assisted consumers with  
1:1 counseling

**74,384**

Outreach events in communities  
across the state

**1,498**

Advertising events statewide

**5,381**

Volunteer training sessions

**45**

# Year in review

*July 1, 2020 - June 30, 2021*

## Virtual services

- Purchased additional ZOOM licenses for our community sponsors, prepaid cell phones, and other equipment to build capacity for remote services.
- Invested heavily in training volunteers on Zoom to set up meetings with clients and perform presentations and outreach events.
- Switched from in-person volunteer training to online Zoom training.
- Created two new COVID-19 fact sheets and webpages. The first fact sheet and webpage offered information about COVID-19 vaccine scams and the second one provided information about Medicare services and COVID-19.

## Medicare Open Enrollment

- Hired temporary Medicare specialists to help clients during Medicare Open Enrollment.



*"I want to extend my gratitude for SHIBA. We moved here in June, and my husband's medical coverage for us expired August 1. Everyone I spoke with at SHIBA was incredibly helpful, and we were able to establish the coverage we needed and felt that we were informed consumers. Now at open enrollment time, and with our Medigap plan increasing more than \$1,000 for our combined coverage, once again, SHIBA was instrumental in helping us make informed decisions. Thank you especially to Carol Blankenship. I can't express enough gratitude enough for helping us navigate the labyrinth of decisions in a respectful and intelligent manner. What a gift SHIBA is to the consumers in this state."*

SHIBA client

**171 SHIBA**  
**volunteers contributed**  
**15,579 hours &**  
**20,179 Beneficiary**  
**Contact Forms**

## SHIBA business

- Executed performance-based contracts with 19 community partners.
- Started the Request for Proposal process for new community partner contracts with a July 1, 2021 start date.

## Outreach

- Created a brand new video about SHIBA and posted it on the agency's website and shared it via social media and with our SHIBA sponsors to include on their websites.
- Sponsored a radio program on a Hispanic radio station that broadcast twice a week, and 12 30-minute program spots about Medicare.
- For Medicare Open Enrollment, we ran over 150 radio ads with a local Seattle radio station and ran statewide radio ads during Seahawk games.
- Increased spending on newspaper print ads.

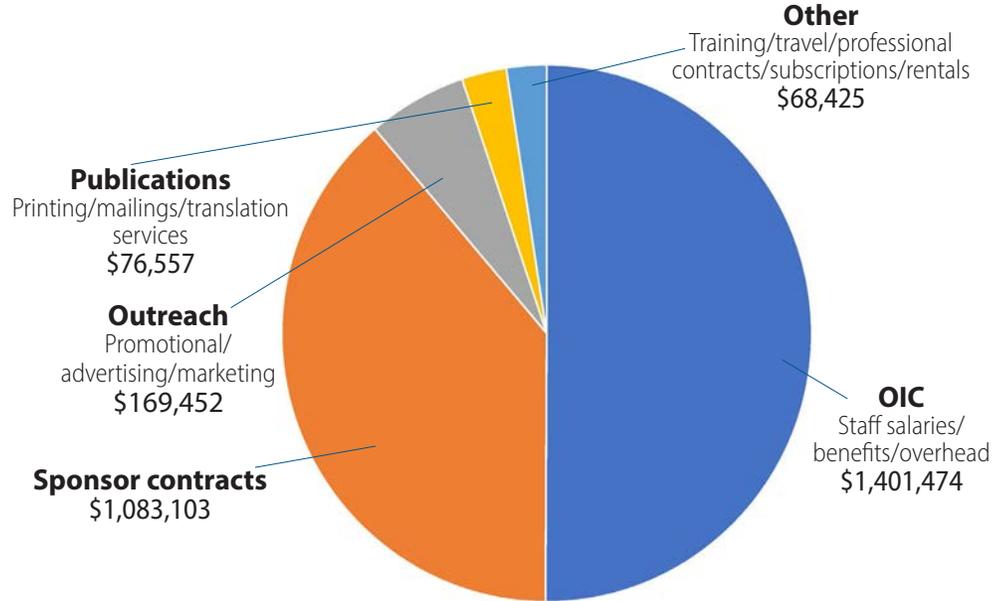
## Welcome to Medicare

- Participated in a national Welcome to Medicare webinar sponsored by the SHIPTA Center.
- We did extensive statewide radio and newspaper advertising that resulted in our state having the highest number of people who registered for the webinar.
- Gave our program the opportunity to help people new to Medicare and ultimately refer many clients out to local SHIBA offices for one-on-one counseling.



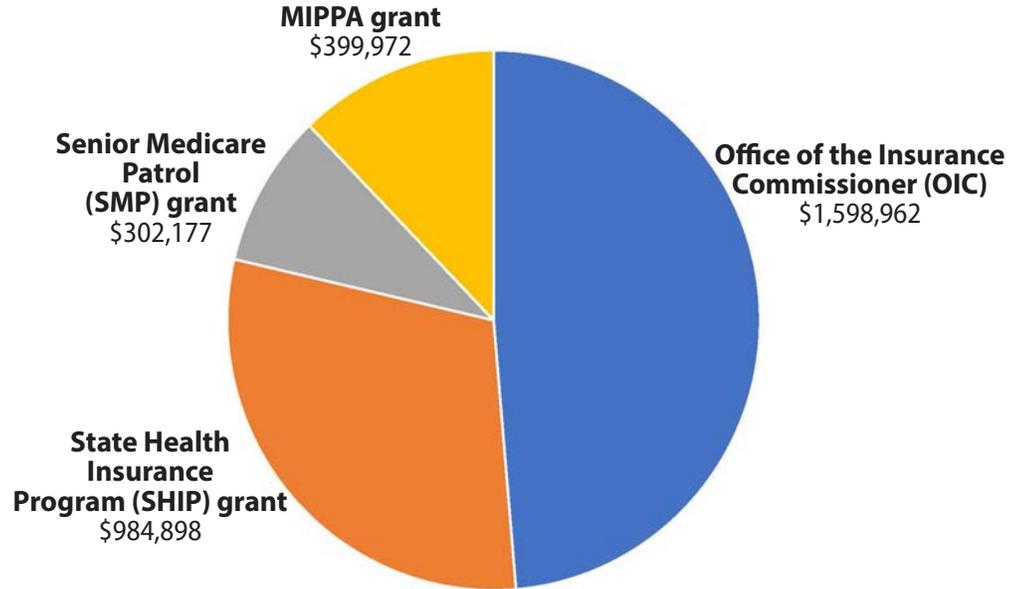
# Financials

## What we invested





## Our funding sources





## Looking ahead - *July 1, 2021 - June 30, 2022*

While our program is responsible for carrying out many day-to-day duties and projects our grantors expect from us, following are key items our program will focus on during this fiscal year.

### **Sponsor contracts**

Create new sponsor contracts, shifting to volunteer management.

### **Medicare Open Enrollment**

Hire temporary Medicare specialists to help clients using technology and collaboration during Medicare Open Enrollment to help with the increased client workload.

### **Volunteer recruitment**

Build capacity in our network for more volunteers by:

- Creating a statewide campaign to recruit new volunteers and promote awareness of the SHIBA program.
- Continuing our project to mentor new volunteers with more experienced volunteers.
- Fostering close connections between volunteers and sponsors with the local Area Agencies on Aging.

### **Outreach to client populations**

We will focus on reaching people on Medicare who are:

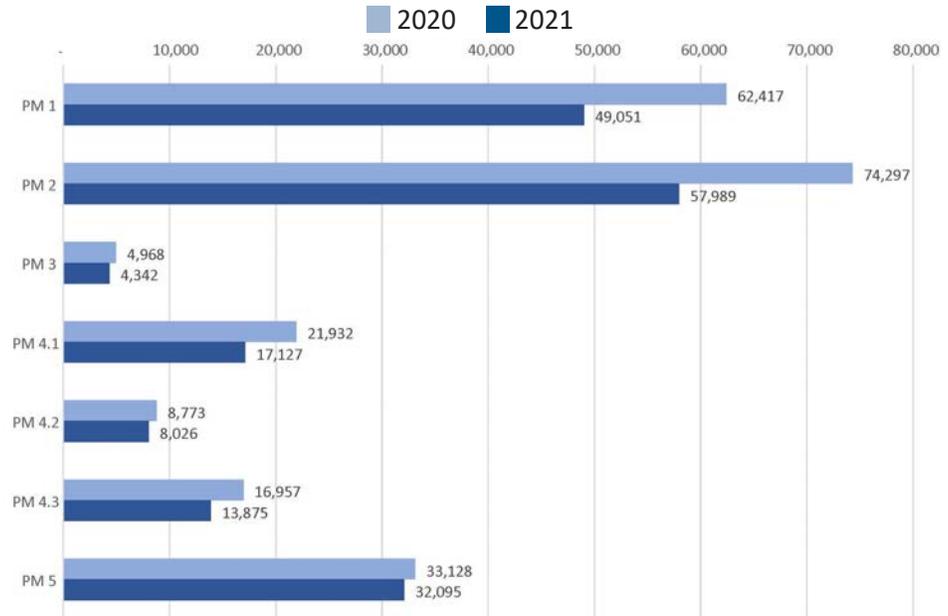
- Low-income
- English as a second language (ESL)
- Live in rural areas
- Disabled

To do this, we'll also work with partners who are trusted by these people.



# SHIBA performance measures

## State Health Insurance Program (SHIP) grant



### Key

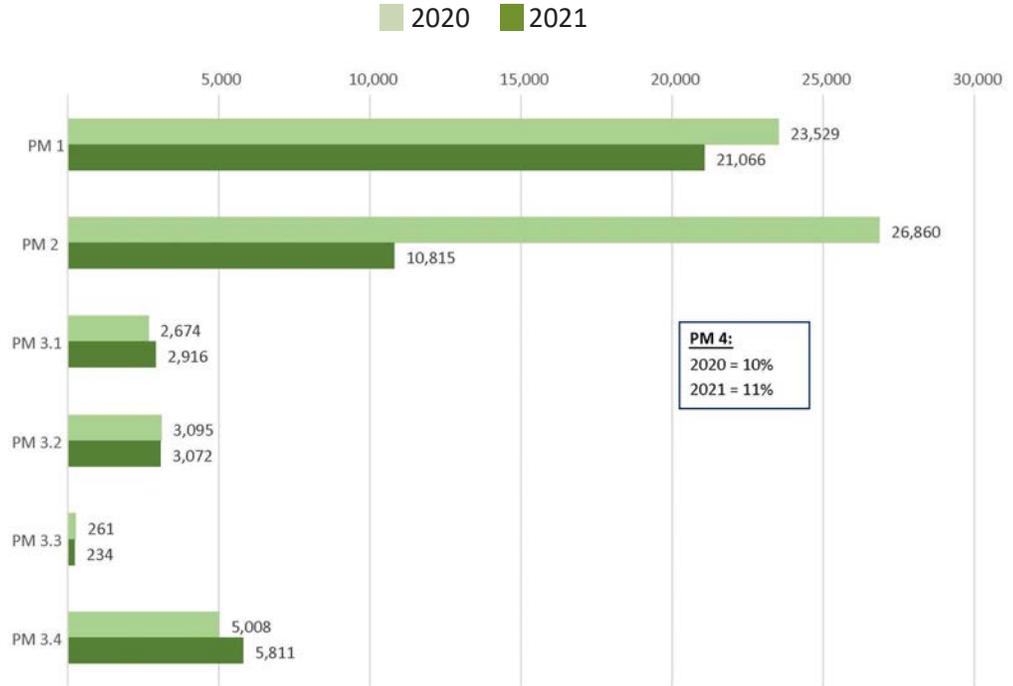
- PM 1: Beneficiary Contact Records
- PM 2: Group outreach
- PM 3: Beneficiaries under age 65
- PM 4.1: Beneficiaries with low income

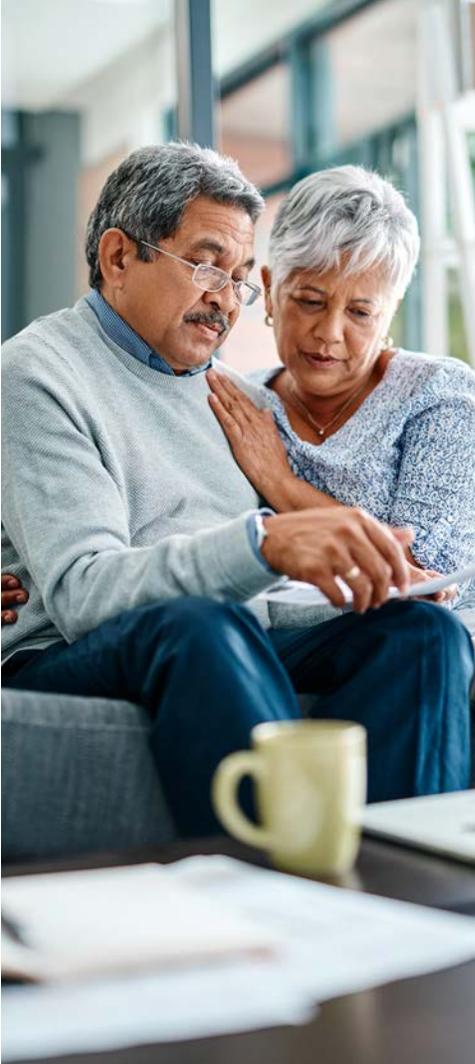
- PM 4.2: Beneficiaries living in rural areas
- PM 4.3: Beneficiaries who speak English as a second language
- PM 5: Enrollment assistance

# Medicare Improvement for Patients & Providers Act (MIPPA) grant

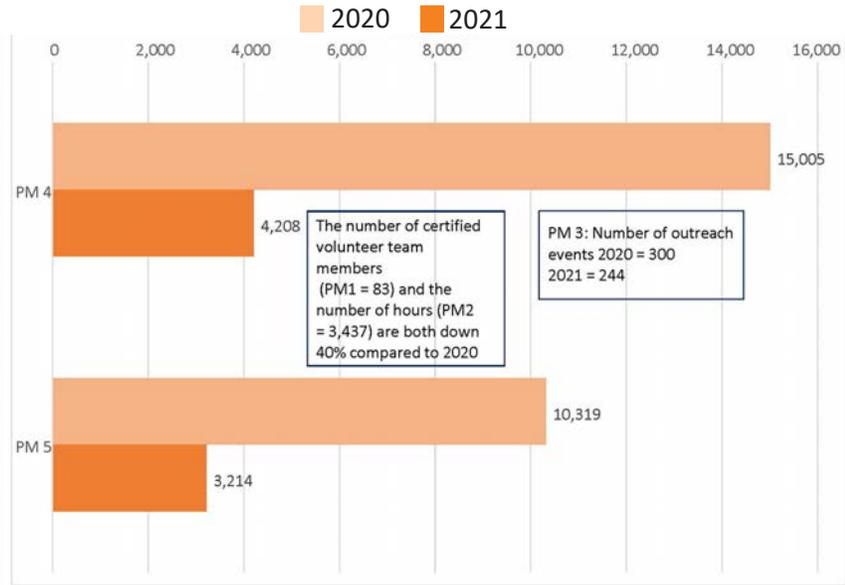
## Key

- PM 1: Beneficiary Contact Records (BCR) for people with income less than 150% FPL
- PM 2: Total number of people reached (reported on Group Outreach & Education forms)
- PM 3.1: Total (BCR) for people under age 65
- PM 3.2: Total (BCR) for people living in rural areas
- PM 3.3: Total (BCR) for Native American people
- PM 3.4: Total (BCR) for people for who speak English as a second language (ESL)
- PM4: Contacts with applications submitted





## Senior Medicare Patrol (SMP) grant



### Key

- PM 4: Number of people reached through group outreach and education events
- PM 5: Individual interactions with or on behalf of a beneficiary



Thank You!

## Thank you!

A heartfelt thank you to our important volunteers and sponsors across Washington state! Without you, there'd be no SHIBA! You're the heart and soul of our program!

*The world is hugged by the faithful arms of volunteers.*

--Terri Guillemets

## Your SHIBA staff

Program Manager Tim Smolen

Budget/Grants Coord. Ron House

Communications Coord. Donna Wells

Field Operations Supervisor Judith Bendersky

Program Operations Supervisor Liz Mercer

Complaint Resolution Coord. Philip Hartshorn

Training/Curriculum Coord. Diana Schesselman

Regional Training Consultants:

- Dale Ensign
- Jean-Marie Dymond
- Kim McKenna
- Sarah Clark
- Terri Osborne