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MEMORANDUM

TO: AAA Directors

NOTICE#: 061705-1-I-LA

FROM: Carole Green
Secretary

DATE: June 17, 2005

SUBJECT: Notice of Instruction: SHINE CMS Grant

The Department of Elder Affairs (DOEA) has received notice of the Serving Health Insurance Needs of Elders (SHINE) Grant through the Centers for Medicare & Medicaid Services (CMS). The purpose of this Notice is to announce the Florida Grant award total of \$2,205,799, and to provide specific information to each area agency on aging (AAA) regarding its contract amount and performance goals for the SHINE Grant Year, April 1, 2005 through March 30, 2006. This DOEA grant total includes funding for SHINE Headquarters, AAA contracts and a special CMS competitive grant award to develop a national evaluation tool. SHINE serves elders, their caregivers, representatives and pre-eligible beneficiaries age 50-64 through Long-Term Care (LTC) planning assistance.

The SHINE Grant process has been discussed in conference calls and at the last SHINE Leadership Event held May 17-18, 2005, in Tallahassee. All AAAs submitted work plans during May using the required format. As noted in the original contract, performance reports and invoices will be submitted quarterly.

This grant year, AAAs must establish suitable spending plans and financial monitoring which assure appropriate use of funds. Spending documentation will be periodically reviewed by DOEA, and significant spending variations will be addressed during the grant year. For example, if spending during the third quarter is far less than expected per the spending plan, a contract amendment will be issued to return a portion of the AAA grant. In this way, other AAAs that have achieved target outputs/outcomes and that submit a justification for additional funds will have an opportunity to increase their share of the CMS grant.

All AAAs have received an increase in funding that is proportionate to the 20% increase received by DOEA from CMS. The spending allotments are consistent with past contracts. A percentage formula defined and computed by the DOEA Planning and Evaluation Unit calculated the percentage of residents in each Planning and Service Area (PSA) who are aged 50 or older, and that calculation was used for a portion of this grant. Additionally, the amount designated for each AAA includes the LTC carry-forward dollars as reported in the 2004-2005 budget documentation submitted to DOEA.

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Again this grant year, DOEA requires that funds spent on LTC activity recorded in the quarterly work plans be reported as a separate budget line item. A new line item budget will be created and submitted to the grant manager as noted in the attachment to this Notice of Instruction by June 27, 2005.

It is anticipated that due to the current focus on beneficiary education and service related to the Medicare Modernization Act, Public Law 108-173 in every PSA, SHINE initiatives will be integrated into the area plan and promoted/supported by AAA staff. Supplemental funds may be used in conjunction with other sources already in place. Thank you in advance for your cooperation. Please direct any comments or concerns to the SHINE Program Director and Grant Manager John Chreno at (850) 414-2157.

CG/jdc

Attachment