

From: Eleanor Stein <eleanor@imph.org>
To: Kester, Tony<tonykester@aging.sc.gov>
CC: virgie@imph.orgvirgie@imph.org
Date: 12/4/2014 1:59:28 PM
Subject: RE: LGOA information for steering committee

Hi Tony,

I just wanted to follow up on the email below and touch base about the proposed format for budget information that we'd sent along before Thanksgiving. Did you have any questions about it or need anything else from our end?

Do you have a sense of when you might have the information for us? I think it would likely be helpful to look at it together with you as soon as we can (perhaps early next week), in case we have questions, etc. (As you know, our steering committee will meet again on December 16, and the group will need to review this information during our discussion that day.)

Hope all's well!

Thank you,
Eleanor

From: Eleanor Stein [<mailto:eleanor@imph.org>]
Sent: Monday, November 24, 2014 1:20 PM
To: 'Kester, Tony'
Cc: 'virgie@imph.org'
Subject: RE: LGOA information for steering committee

Hi Tony,

Thanks again for meeting with me and Virgie last week. I'm sending along a proposed format for the budget information needed by the steering committee. My goal was to create a document that would outline expenditures by major program areas and denote funding sources. As you'll see, I've outlined budget categories that would be useful. Of course, you might have other suggestions about how to break out this information based on how you usually group programs/services internally.

This information is needed for our next steering committee meeting in mid-December (December 16) so I can follow up with you during the first week in December to touch base about it.

One specific item to note... You shared with us an internal budget form and noted that there were three line items in the administrative section that are actually services (I, R & A, Family Caregiver and Ombudsman). I've listed those items on this proposed format under the "Service/programs" expenditures section. Does that work?

Thanks much and enjoy a great Thanksgiving,
Eleanor

From: Eleanor Stein [<mailto:eleanor@imph.org>]
Sent: Tuesday, November 18, 2014 5:05 PM
To: 'Kester, Tony'
Subject: RE: LGOA information for steering committee

Hi Tony,

10:00 tomorrow (Wednesday, 11/19) will work well for both me and Virgie. We can have an initial discussion then and if follow-up is needed, we can certainly do that at your convenience.

Thanks much,
Eleanor

From: Kester, Tony [<mailto:kester@aging.sc.gov>]
Sent: Tuesday, November 18, 2014 4:52 PM
To: 'eleanor@imph.org'
Subject: RE: LGOA information for steering committee

Eleanor,

Wednesday would work. How about 10:00?

Tony Kester
Aging Director
South Carolina Lieutenant Governor's Office on Aging
1301 Gervais Street, Suite 350
Columbia, SC 29201
Phone 803-734-9910, Fax 803-734-9886
kester@aging.sc.gov

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From: Eleanor Stein [<mailto:eleanor@imph.org>]
Sent: Tuesday, November 18, 2014 12:42 PM
To: Kester, Tony
Subject: RE: LGOA information for steering committee

Hi Tony,

Thanks for your email. I'd like to ask my colleague Virgie Chambers to join us in the meeting, since her expertise on all things budget-related far exceeds mine. We have availability this week and next week before Thanksgiving, if that might work for you. Here are some possible days:

- Wednesday, 11/19 most any time
- Monday, 11/24 most any time
- Tuesday, 11/25 afternoon

Might you have any availability on these dates? If so, just let us know what time you'd prefer. If the days listed above don't work, could you let me know if you have availability any other dates/times in the next week, and I can work to juggle schedules so that we can meet at your convenience.

Thank you,
Eleanor

From: Kester, Tony [<mailto:kester@aging.sc.gov>]
Sent: Tuesday, November 18, 2014 11:55 AM
To: 'eleanor@imph.org'
Subject: RE: LGOA information for steering committee

Eleanor,

It would be best to meet with me. Do you have a particular day and time in mind?

Tony Kester
Aging Director
South Carolina Lieutenant Governor's Office on Aging
1301 Gervais Street, Suite 350
Columbia, SC 29201
Phone 803-734-9910, Fax 803-734-9886
kester@aging.sc.gov

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From: Eleanor Stein [<mailto:eleanor@imph.org>]
Sent: Tuesday, November 18, 2014 11:50 AM
To: Kester, Tony
Cc: Lee Pearson
Subject: LGOA information for steering committee

Hi Tony,

We had a productive steering committee meeting yesterday. I'm sorry you weren't able to join us and hope your trip to Aiken wasn't too soggy!

Following up on the meeting, I am writing to inquire about budget information that will be needed by the steering committee in order to finalize the package of recommendations and build a comprehensive narrative supporting those recommendations. I would like to meet with you and/or a member of your budgetary staff to discuss your FY14 budget, including any of the information below that you might be able to provide:

- The LGOA's various funding sources (How much money comes from each source? How much of the funding is state money?)
- A breakdown of funds by program area (How much money is allotted to the major different programs? In particular, information on HCBS is needed, including information on all funding sources.)
- Information on how many people are served and how many are on waiting lists
- Information on costs per person of the various major programs/services (or costs per service, depending on what cost utilization measures you use)

Based on our meeting discussion yesterday, I would say the most urgent information needed relates to HCBS funded through the LGOA. So, if it is possible to get that information first, we could then follow up separately about the other information.

Could you let me know who is best to follow up with regarding our request for the above information? Since you are a steering committee member, I've reached out directly to you, but I know your schedule requires a lot of travel so we'd be happy to follow up with a member of your budgetary staff, if that's best. We'd also be happy to meet in person to further discuss our request and what kind of information might be available.

Given the taskforce timeline, we hope to be able to follow up with you soon on this information.

Thank you,
Eleanor

Eleanor Stein
Long-Term Care Taskforce Coordinator
SC Institute of Medicine and Public Health
803-800-7021 (cell phone)