How to Choose and Use Consultants Wisely

Strategies for a Successful Experience
Agenda

- Introductions
- Why Use a Consultant (and why work with USAging’s Consultants)?
- To RFP ... or not? plus Core Elements for an RFP
- Setting Goals and Measuring Success
- Meet our Consultants!
Presenters

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• Senior Program Manager, Aging and Disability Business Institute, USAging

Paul Cantrell

• President, Clear View Strategies, LLC
• Manager, USAging Consulting Program
The Business Institute

The mission of the Aging and Disability Business Institute (Business Institute) is to successfully build and strengthen partnerships between community-based organizations (CBOs) and the health care system so older adults and people with disabilities will have access to services and supports that will enable them to live with dignity and independence in their homes and communities as long as possible.
Getting Started

Everyone needs some help with taking that first step. For aging and disability community-based organizations, Getting Started provides a collection of business acumen resources to help those beginning their journey toward partnerships and contracts with the health care sector. Start here if you are looking for the basics, or if you need a refresher on health care contracting fundamentals.

LEARN MORE

Featured Content

US Aging

Aging and Disability Business Institute
Our work

- Training
- Technical Assistance
- Resource Development
- Information Gathering
- Consulting Services
- Thought Leadership
Why use a Consultant?
Weighing the Benefits and Drawbacks

- **Unique Expertise**
- **Their Contacts**
- **Increase Bandwidth**
- **Third party perspective**
- **Speed and Efficiency**

- **Time needed to find one**
- **Getting them up to speed**
- **Inconsistent Vision**
- **Lack of Expertise**
- **Cost**
USAging Consulting Services

Our Consultants:

✓ Vetted
✓ Nationally recognized
✓ Deep knowledge and expertise in—
  • managed care
  • health care
  • Medicare/caid
  • Social care
  • AAAs and CBOs

Focus Area Highlights:

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<th>Focus Area Highlights</th>
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<td>Strategy and Business Planning/Readiness</td>
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Request for Proposal (RFP)
Reasons to Use an RFP ... or NOT

**Reasons to Use an RFP:**

1. Complex Project
2. Objective Goals
3. Clear/Static Deliverables
4. Clear plan
5. Funder Requirement

**Reasons NOT to Use an RFP:**

1. Non-complex project
2. Uncertain need/goals
3. Trusted Consultant
4. Fluid project
5. Urgency/lack of time for RFP process
Core Elements for a Successful RFP

Provide Key Highlights of the Agency

- **Founded In**
  - 1945

- **Service Area**

- **Our Mission**
  - “Provide your Mission Statement”

- **Our Background**
  - Provide a brief history about the Agency’s background

- **Our Vision**
  - “Provide your vision statement”

Outline the goals you want to achieve *(what does success look like?)*

- **01** Describe the Problem you are trying to solve

- **02** Core RFP Elements

- **03** Provide clear requirements AND invite Consultants to propose responsive AND creative solutions

- **04** Outline your involvement as well as key requirements, timeline and budget
Detailing the Project’s Elements

**Project Details**
- Problem and Goals
  - Be very specific here especially about the scope
- Project Operations Details
  - Who will be involved? How often will you meet? Facilitation or Hands on?
- Project Dates & Milestones
- Budget, billing and payment
  - Retainer, Project Rate or Hourly

**Key Goals of the project**
- Create a Contracting Strategic & Marketing Plan
  - Market Analysis
  - SWOT
  - Operational Assessment
- Introductions
  - Secure introductions with C-Suite contacts at 2 local health plans
  - Secure meeting with Aging Comm. Chair.
- Compliance Review
  - Review Compliance Program
  - Provide gap analysis and comprehensive recommendations for improvements and P&P edits
## Formal RFP Elements

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<tr>
<th></th>
<th>Agency Overview</th>
<th>Project Details</th>
<th>Requirements to Qualify for the Bid</th>
<th>Technical Requirements for the Project, if any</th>
<th>Timeline for the Bid</th>
<th>Pre-Bid and Post-Bid Meeting, if any</th>
<th>Budget Details of the Project</th>
<th>Proposal Format for Submission</th>
<th>Key Evaluation Criteria</th>
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Goals and Measurement
Managing Consulting Projects and Measuring Success

**Elements**

**Co-create a Work Plan**
- Focus on deliverables, timing, and milestones.
- Watch for scope creep and be very clear on responsibilities.

**Stay focused on assignments and status**
- Stay on target (for your older Star Wars fans!).
- Use the Work Plan as your guide.

**Communicate!**
- Meet regularly and focus on the tasks and any barriers.
- If adjustments need to be made, talk about them and issue Change Orders if necessary.
- This is a two-way street; Everyone must be accountable.
- Evaluate success against the project goals and adjust where needed.
- Celebrate successes!

**Deliverables and Timeline**
- Communicate clearly about costs and expenses.
- Pay your consultants timely!

**Budget and Payment**
Meet our Consultants!
Learn More About the Business Institute

• Visit our website to learn more about the Business Institute: aginganddisabilitybusinessinstitute.org

• Still have questions? Email us: BusinessInstitute@usaging.org

• Stay up-to-date on our events calendar. New webinars added regularly: aginganddisabilitybusinessinstitute.org/events

• Stay connected, sign up for our bi-monthly newsletter: https://www.aginganddisabilitybusinessinstitute.org/subscribe-to-our-mailing-list/
49TH ANNUAL CONFERENCE & TRADESHOW

Save the Date!

Tampa

JULY 8-11 2024