



Aging and Disability  
**BUSINESS INSTITUTE**

*Connecting Communities and Health Care*

# Webinar Instructions

## Audio Options

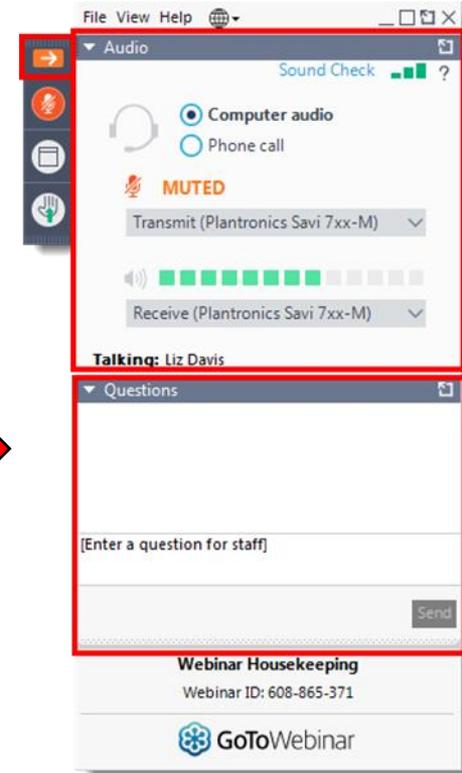
- Use your computer speakers, **OR**
- Dial in to the conference call
- All participants are muted

## “Questions” box

- Q&A session will be at the **end** of the presentation, but feel free to submit your questions at any time during the presentation. Click on the dropdown arrow “▼” to pop out the questions box where you can type and submit your questions.

## Technical Issues

- Due to increased demand on tele-work platforms, we may experience technical issues during the webinar. We assure you we are working to mitigate and correct any possible interference.



# 2021 Financial Acumen Learning Collaborative

- Maya Op de Beke, Aging and Disability Business Institute
- Lori Peterson, Collaborative Consulting
- Victor Tabbush, Collaborative Consulting
- Karol Tapias, Aging and Disability Business Institute

# 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.

[aginganddisabilitybusinessinstitute.org](https://aginganddisabilitybusinessinstitute.org)

# aginganddisabilitybusinessinstitute.org

The screenshot shows the website's header with navigation links: About, Blog, Success Stories, Readiness Assessment, Events, Get Involved, Ask an Expert, and a search icon. The main content area features the title "Aging and Disability Business Institute" and the subtitle "Connecting Communities and Health Care". Below this is a descriptive paragraph: "When community-based organizations (CBOs) and the health care system work together, older adults and people with disabilities get the coordinated care that lets them live with dignity and independence in their homes and communities as long as possible." The background image depicts a diverse group of professionals, including a doctor, a man in a suit, a woman in a white coat, and an older man, gathered around a table with a laptop and a tablet, appearing to be in a collaborative meeting. A sidebar on the left lists "Resource Categories" such as "Get Started", "Understand the Landscape", "Define Your Value", "Build Your Network", "Manage Finances", "Evaluate Contracts", and "Deliver Measurable Results". At the bottom of the main content area, there is a purple curved banner labeled "Featured Items".

# Our Funders



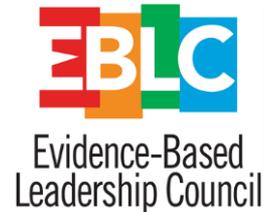
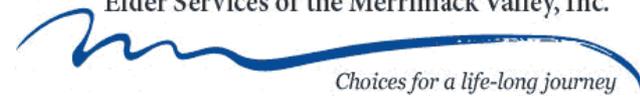
The  
**John A. Hartford**  
Foundation



# Our Partners



Elder Services of the Merrimack Valley, Inc.



# Learn More About the Business Institute

- Visit our website to learn more about the Business Institute:  
[aginganddisabilitybusinessinstitute.org](https://aginganddisabilitybusinessinstitute.org)
- Still have questions? Email us:  
[BusinessInstitute@n4a.org](mailto:BusinessInstitute@n4a.org)
- Stay up-to-date on our events calendar. New webinars added regularly:  
[aginganddisabilitybusinessinstitute.org/events](https://aginganddisabilitybusinessinstitute.org/events)
- Stay connected, sign up for our bi-monthly newsletter:  
[eepurl.com/gg2JGL](https://eepurl.com/gg2JGL)

# Background on the Collaborative

- Funded by U.S. Administration for Community Living (ACL)
- Purpose is to support community-based organization (CBO) leaders with knowledge and skills necessary to create and sustain financially viable partnerships and contracts with health care organizations.
- Up to 15 CBOs

# Who is Collaborative Consulting

- 10+ years working at the intersection of health and social care
- Our projects have been made possible through a variety of client-types within the system of health and social care such as foundations, national member associations, county health departments, federal agencies, health systems, payers, and community-based organizations
- Our project work takes shape in a variety of ways, including strategy and positioning, cross-sector partnership design and implementation, capacity, skill and leadership building, market assessment and research, and the creation of community-based networks

# Topics Areas

1. True costs
2. Evidence of service effectiveness
3. Alternative ways to price
4. Assessing net income
5. Health care value drivers
6. Financial risk
7. Negotiating price

# Learning Objective

- Identify true/expected costs
- Examine and compare multiple alternative payment models
- Present a compelling business case to health care
- Present methods for negotiating financial worth of services to health care
- Identify and manage potential financial risks in contracting

# Benefits to Participating Organizations

1. **Financial Acumen Organization Assessment:** Access to and interpretation of the results of the Financial Acumen module of the n4a Readiness Assessment
2. **New business-minded approaches** to thinking and acting in the financial realm of cross sector partnering.
3. **Proposal methodology:** Step-by-step methodology to present a proposal to a healthcare organization.
4. **Financial models:** Exposure and use of practical financial models to enable informed decisions.
5. **Enhanced long-term sustainability** of your organization and network.
6. **Financial best practices:** Discovery of best practices deployed by leading CBOs in the contracting process.
7. **Financial templates:** Use of multiple templates for the purposes of costing, pricing and establishing the business case for your services.

# Use of a Real Case

1. Not the typical slide and lecture-driven webinars
2. Interactive facilitated discussions
3. The case focuses on key financial issues within a typical and real contracting context
4. Participants will offer their own ideas on addressing the issues and opportunities presented in the case
5. Facilitator to offer experience-based guidance
6. Advantages of the case approach
  - Interaction to increase engagement
  - Better retention of key concepts
  - Greater likelihood of application of these concepts

# Participant Expectations

1. Achieve the FALC **learning objectives**.
2. Dedicating **4-5 hours per month** to FALC activities.
3. Participating in **4 monthly webinars** and reporting on progress and lessons learned
4. Submitting **progress report** updates and **other learning assignments** on time each month.
5. Becoming familiar with the community integrated health care **resources** on [n4a's Aging and Disability Business Institute](#) website as well as other supplemental materials.
6. Completing an **evaluation survey** at the conclusion of the learning collaborative.

# Timeline

1. Application released: January 11, 2021
2. Informational webinar: Week of January 18, 2021
3. Application deadline: **February 5, 2021**
4. Selected participants notified: February 19, 2021
5. Monthly webinars: **Thursdays 2-4pm ET** of each month from March through June 2021
  - March 4th (1st Thursday)
  - April 22nd (3rd Thursday)
  - May 6th (1st Thursday)
  - June 3rd (1st Thursday)

# Application

- Charter and other details available online at the [Aging and Disability Business Institute website](#)
  - Direct link to the [application](#)
- Submission guidelines
  - Answer all questions and adhere to the specified word limits.
  - Define all acronyms in parentheses after the first use of the word or phrase.
  - Proofread all submissions and carefully avoid errors.
- Submissions due COB **Friday February 5, 2021**

# Questions?

Please contact Karol Tapias [ktapias@n4a.org](mailto:ktapias@n4a.org) or Maya Op de Beke [mopdebeke@n4a.org](mailto:mopdebeke@n4a.org) with any questions regarding the FALC or completion of the application.