



Request for Proposal:

Emerging Healthcare Trends and Opportunities for Social Care Service Providers Training

**Applications due
October 11th, 2024**



TRELLIS™

Area Agency on Aging

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Contents

Introduction	3
Background	3
Scope of Work.....	3
Objective	3
Key Deliverables.....	4
The Audience	4
Project Timeline	5
Project Duration.....	5
Key Milestones.....	5
Consultant Qualifications.....	6
Required Experience and Skills	6
Preferred Qualifications.....	7
Proposal Submission Requirements	7
Proposal Content	7
Submission Deadline.....	7
Submission Process.....	7
Evaluation Criteria.....	7
Contact Information.....	8

Introduction

Trellis, through its Juniper program, seeks an experienced healthcare and business consultant to plan and implement a comprehensive training program for social care service providers focused on current trends and opportunities in the healthcare industry. The objective is to equip the Juniper network providers and other stakeholders with the knowledge and skills needed to navigate the evolving healthcare landscape and to leverage future business opportunities.

Background

As the designated Community Care Hub (CCH) in Minnesota, Juniper is committed to improving community health and well-being by providing social care services focused on preventive care, health equity, and the social determinants of health. Our mission is to enhance the quality of life for our neighbors, particularly those in underserved communities, by offering innovative care solutions and support systems.

Juniper is organized in a network model with Trellis as the management service organization (MSO) and over forty organizations located throughout Minnesota that operate as network members, referred to as Juniper Providers. These organizations are Community-Based Organizations (CBO) providing social care services. The social care services that they provide for their communities help to address Health-Related Social Needs (HRSN) and include Evidence-Based Health Promotion classes, Caregiver Support services, Meals, Transportation, etc. They provide these services as a contracted healthcare benefit for certain members, while Trellis serves as the MSO managing centralized administrative functions. These functions include, but are not limited to, billing, contracting, IT, compliance, licensing, and reporting.

Historically, grant funding has supported these social care services. In recent years grant funding levels have not kept pace with the demand or cost of services. This has driven the development of new payer relationships with health care systems and health insurance. Receiving payments from health insurance is a new concept that CBOs are acclimating to. The goal for this request for proposal is to provide a training opportunity for CBOs about the opportunity and requirements to offer social care services as a contracted healthcare benefit.

You can learn more about Trellis here: <https://trellisconnects.org/>

You can learn more about Juniper here: <https://yourjuniper.org/>

Scope of Work

Objective

We seek an experienced healthcare and business consultant to plan and deliver comprehensive and energizing training about trends and opportunities in healthcare for staff at CBOs who deliver social care services. Training should include what incentivizes healthcare organizations, for example health care systems or health plans, to partner with CBOs and CCHs to address health-related social needs, the financial and programmatic opportunity this creates for CBOs and CCHs, and the requirements and



responsibilities to operate as a healthcare vendor. The consultant should incorporate information on value-based care models, CAHPS, Star Ratings, HEDIS, etc. as incentives and drivers for healthcare decision making and priorities.

Key Deliverables

Consultant will be expected to provide the following deliverables:

- Training content development:
 - o Current trends in healthcare including policy changes enabling payment models for social care.
 - o Business incentives in healthcare including reimbursement models, quality measures, and value-based care. How these incentives align healthcare systems and health plans to work with CBOs/CCHs.
 - o Financial and programmatic reasons why a CBO/CCH would want to offer social care services as a contracted healthcare benefit.
 - o Strategies for training delivery based on adult learning styles, content, and audience.
- Training delivery:
 - o Facilitate a minimum of 4 hours of training for 40-60 individuals.
 - o Format, content, duration and schedule for training should be included in the proposal submission. Describe strategies based on audience and adult learning styles. In-person and virtual training are both acceptable, but an in-person component is preferred.
Materials and Resources:
 - o Development of any training materials including, but not limited to, slides, handouts, and worksheets.
 - o Provide access to any case studies, research or articles referenced within the training materials.
- Assessment and Evaluation:
 - o Pre-training assessment to measure current knowledge level of participants.
 - o Post-training assessment to measure knowledge level of content and satisfaction with training experience.
- Recommendations for post-training follow-up activities.

The Audience

Our audience for this training will include a broad spectrum of individuals all working in the social care space. They include:

- Hospital injury prevention coordinators
- Healthcare systems

- Social service organizations
- Non-profit organizations
- For-profit organizations
- Senior Housing organizations
- Faith-based organizations
- Sole proprietors
- State and county units on public health

Our audience has experience participating in the Juniper network for 3 months to 6+ years. Their experience operating as an organization providing social care services as a healthcare benefit ranges from 3 months to 6 years. The roles of audience members within their organization range from direct service provider to executive director or CEO. Finally, half of the audience members are in the Twin Cities metro area and half are in greater Minnesota. Applicants should consider all these elements for their proposal.

Project Timeline

1. September 16, 2024: RFP Release
2. September 16 – October 11, 2024: Trellis accepting proposals
3. October 14 – 18, 2024: Vendor selection and contract negotiation
4. October 21 – November 1, 2024: Project Kickoff

Project Duration

Project is expected to begin promptly upon the selection of the consultant and end by March 28, 2025.

Key Milestones

- Kickoff Meeting and Related Preparation
 - o Due Date: November 1, 2024
 - o Description: Initial meeting with key stakeholders to discuss project objectives, scope, and timelines.
- Draft Training Plan
 - o Due Date: November 15, 2024
 - o Description: Detailed outline of training schedule and content as well as a description of how content will be delivered and the learning objectives.
 - o Deliverable: Detailed outline of training content
- Final Training Plan



- Due Date: December 6, 2024
- Description: Detailed training plan that includes information about the day(s), time(s), location(s), topics and learning objectives and plan for how content will be delivered for adult learners.
- Deliverable: Written final training plan.
- Training Delivery and Delivery of Training Resources
 - Due Date: February 28, 2025
 - Description: All training materials include presenter materials and notes; handouts, worksheets, and articles for attendees; and the training agenda are prepared. Training is delivered and recorded.
 - Deliverable: Training materials are prepared, and training is delivered.
- Training Evaluation
 - Due Date: 1 week after training delivery concludes.
 - Description: Report on training evaluation outcomes including pre and post training knowledge levels and attendee training satisfaction.
 - Deliverable: Report
- Recommendations for Post-Training Follow-up Activities
 - Due Date: March 28, 2025
 - Description: Written summary with recommendations for any follow-up activities following the training to maintain CBO knowledge of healthcare trends and business opportunities.
 - Deliverable: Written summary of recommendations

Consultant Qualifications

Required Experience and Skills

- Proven experience in planning and implementing professional training for adult learners.
- Strong skills in using visual aids, storytelling techniques and interactive elements when presenting for audience engagement.
- Expert knowledge of value-based care models, Star ratings, CAHPS, HEDIS as incentives for healthcare and why healthcare entities would want to address health-related social needs.
- Familiarity with the regulatory landscape and compliance requirements in healthcare, specifically HIPAA and Medicare.
- Knowledge of Medicare Advantage supplemental benefits and billing codes for addressing health-related social needs.
- Experience with strategic consulting to community care hubs or community-based organizations around healthcare contracting.

Preferred Qualifications

- Previous work experience with organizations focused on social services and community health services.
- Previous work experience with healthcare risk-bearing entities.
- Individual or firm experience in leading projects of varying sizes, including demonstrated ability to achieve milestones in a timely manner.

Proposal Submission Requirements

Proposal Content

Proposals should include the following sections:

1. Executive Summary: A brief overview of the proposed approach and key differentiators.
2. Consultant Background: Information about the consultant or consulting firm, including relevant experience, short bio, resume, and qualifications.
3. Approach and Methodology: A detailed description of the proposed approach to the project, including methodologies for assessment and roadmap development.
4. Project Timeline and Deliverables: A timeline with key milestones and deliverables.
5. Cost Proposal: A detailed cost breakdown, including fees for each project phase.
6. References: At least three references from previous clients within the last five years, particularly those in the healthcare industry. Please describe the types of projects undertaken with these references.

Items 1 – 5 should not exceed ten pages.

Optional & appreciated: a video clip, or link to a video, of proposed speaker(s) delivering a training or at a speaking engagement.

Submission Deadline

Proposals must be submitted no later than October 11th at 4:30pm. Late submissions will not be considered.

Submission Process

Submit proposals electronically to Rachel Bremness at rbremness@trellisconnects.org with the subject line "RFP Submission."

Evaluation Criteria

Proposals will be evaluated based on the following criteria:



- Relevant Experience and Expertise: The consultant's experience in healthcare, social care services, and related projects.
- Approach and Methodology: The clarity and feasibility of the proposed approach.
- Cost and Value: The cost-effectiveness of the proposal in relation to the value provided.
- Reference and Track Record: Feedback from references and demonstrated success in similar projects.
- Project Understanding: Understanding of the project requirements and objectives.
- Innovation and Creativity: Innovative and creative solutions offered in the proposal.
- Team Composition and Capacity: Qualifications, skills, and capacity of the team proposed to work on the project.
- Risk Management: Strategies proposed to keep project on time.

Contact Information

For questions or further information, please contact:

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