

# CONSULTATION PREP GUIDE

MAXIMIZE OUR COLLABORATION

## 1. Identify Your Goals

Before our consultation, take some time to reflect on what you hope to achieve. What are the key objectives you want to address? Having clear goals will help us tailor the conversation to your specific needs and ensure a productive discussion.

Consider these guiding questions to help prepare:

- **What specific challenges are you facing right now?**  
(Compliance gaps, staffing shortages, grant deadlines, performance tracking, etc.)
- **What opportunities are you hoping to explore?**  
(New funding, system upgrades, internal controls, strategic planning...)
- **What outcomes would make this consultation feel like a success?**  
(A roadmap, clarity, validation, new ideas, resources, or an action plan)

If you're not sure yet — that's okay. We're here to help you find the right path forward.

## 2. Gather Background Materials (if available)

If you have any relevant documents, reports, or data that can provide context to your goals, please gather them. This could include:

- Notices of Funding Opportunity (NOFOs)
- Award Agreements
- Single Audit Reports
- Financial Policy

Sharing these materials in advance will help us come prepared and make the most of our time together. Don't worry if you don't have everything; bring what you can.

### 3. Clarify Internal Capacity and Systems

To ensure our recommendations are practical and implementable, it's helpful to have a clear understanding of your internal resources and systems. Consider the following:

- What internal expertise do you have available?
- What systems and technologies are currently in place?
- What are the limitations or constraints you face?

### 4. Bring Your Questions

Don't hesitate to bring any questions you have, big or small. Our goal is to provide clarity and guidance, so we encourage you to come prepared with a list of topics you'd like to discuss. There are no bad questions!

### 5. Come As You Are

There's no need to put on a show or pretend to have all the answers. We value honesty and transparency. Just come prepared to share your thoughts and ideas openly.

We're here to listen, understand, and work collaboratively with you.

### Questions Before the Meeting?

If you have any questions or need to clarify anything before our consultation, please don't hesitate to reach out. We're happy to assist you in any way we can.

# DC SMITH ADVISORY

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