Using Automation and Data to Improve Performance

Anne Owens, Kennebec Valley CAP
Crystal Sarino, Los Angeles Universal Preschool
Mindy Zapata, Southwest Human Development
Facilitator: Libbie Poppick, Opportunities Exchange

Format

• Framework
  ▪ Why are we talking about automation and data?
• Panelists describe their approach
  ▪ How does each organization deal with automation/data?
  ▪ What is the impact?
• Interspersed discussion with audience
High Quality ECE Requires Strong Leadership

- Child development expertise
- Classroom coaching
- Teacher supervision
- Instructional leadership
- Child assessments

- Full enrollment
- Fee collection
- Cost-per-child calculations
- Fundraising
- Reporting and compliance
- Staffing and structure

Role of Automation in Leadership

- Business Leadership:
  - Saves administrative time
  - Decreases errors (no double entry)
  - Allows sites/functions to easily share data

- Pedagogical Leadership:
  - Reallocate time from administrative to time in classroom
  - Dollars saved reinvested in higher salaries, time off for reflective practice
“Reflective Administration”

• Reflective Practice with teachers, children and families results in positive child outcomes
• Reflecting on strategic use of automation and data can be equally powerful in guiding administrative decisions, e.g.:
  ▪ Staffing: caseloads, benchmarks, supervision
  ▪ Fiscal management: metrics and benchmarks to guide decision-making
  ▪ Compliance: new approaches to regulatory and financial compliance that focus on results but encourage reflection, data analysis and innovation

OppEx Observations from the Field

• Teachers, supervisors and family engagement staff spend too much time entering/re-entering data
  ▪ Sometimes same data entered in multiple systems – attendance, case notes, observations, assessments, etc.
  ▪ Not unusual for key program staff to spend 50% or more of their time on administrative tasks
Observations from the Field (cont’d)

- Providers frequently reluctant to engage with new technology
  - Cost, time, and complexity seem overwhelming
  - How to choose the system that will fix everything?
  - “Personal touch” with families outweighs efficiency
  - Familiarity and comfort with status quo
- Lack of systems for documenting and reflecting on agency-wide administrative data (costs, revenue, efficiency, etc.) makes it hard to improve

What This Discussion Won’t Do

- Won’t address detailed technical issues
- Won’t tell you to purchase one type of system or software vs. another
- Won’t focus on accounting and payroll systems
What This Discussion Will Address

- Information and systems that relate to child, family, classroom, and teaching, e.g.:
  - Child and family data
  - Fee collection
  - Attendance
  - Child assessments
  - Funder reporting
- How using automation and data has helped organizations improve their quality
- The role of automation in Shared Services

The Challenge, As You Listen…

- Set aside discomfort with, or concerns about, technology and data
- Think about whether panelists are accomplishing something you/your organization could do
  - What kind of help would you need?
  - What could you do to start down the road?
Kennebec Valley CAP
Waterville, ME

Non-profit Community Action Program in central Maine:

- **Child and Family Services (C&FS)**
  - Early Head Start and Head Start
  - Child care including Educare Central Maine
  - Preschool/PreK
  - Home visiting

- Community social services
- Energy and housing
- Transportation

KVCAP C&FS Enrollment Specialist

**Highlights and Benefits:**

- Centralized intake system
- Strong relationship building and communication ties with State subsidy systems
- Initial strong parent/guardian connection
- Removes Family Services Staff administrative time
- Consistent message provided to all potential and enrolled clients.
- Consistent eligibility files/documentation with positive audit results
- Participates in Touchpoints
KVCAP C&FS Data Systems

• Child and Family Services serves a large geographic area – equivalent to the size of Connecticut!

• Recent changes to a NEW data collection system for KVCAP – ChildPlus – provides us with the ability to access information electronically and communicate efficiently.

• This data collection system is used for program, child, family and staff data and is customizable.

KVCAP C&FS Data Systems (cont’d)

Highlights and benefits:

• One (1) data system (ChildPlus) eliminated six (6) separate data systems including locally-designed ACCESS databases for:
  - In-kind/volunteers
  - Services received by families
  - Attendance – time in and out for subsidy billing
  - Inventory
  - Parent events
  - Staff training, degrees, licenses and credentials – coming soon
**Additional benefits using ChildPlus:**

- Electronic records – available for all users with appropriate security levels
- Increases efficiencies and decreasing staff time
- Eliminates duplication and maintenance of separate systems.
- Ability to export data in various reporting formats.
- User friendly with the opportunity and capacity to grow with customizable fields, module designer, internal monitoring checklists, CLASS observations and assessment instruments!
- A statewide ChildPlus user group for all Head Start programs in our state is being formed. This will allow us to obtain consistent statewide data, identifying community needs and programming options for various grant and funding opportunities.

---

**KVCAP C&FS Data Systems - Budgets**

- **Multiple funding sources with various budget cycles can get complicated!**
- Blended funding can provide for many great programming options and opportunities - but can be challenging.
- Creating a locally-designed ACCESS database helps our program manage our program’s budgets easily and efficiently including:
  - Budget planning and development
  - Employee projections, allocations and expenses
  - Detailed reporting by grant, funding sources, account lines or account description
  - Real-time, in-depth budget monitoring by various management personnel
  - Ability to generate invoices and reports required by funders
Business Services Pilot Program
Child Data Management Services

5/1/2017

Who we are?

Your Partner in Improving the Quality of Early Learning
What we’ve learned?

With over 10 years of working with early learning programs, we learned administrators:

• Required assistance with complying with reporting requirements for regulatory agencies
• Spent a significant amount of time on manual processing fulfilling reporting requirements for the food program
• Did not review and actively maintain child and family data files
• Lacked capacity and resources to implement an automated system

Business Services Pilot Program

LAUP Business Services

Financial Services

Child Data Management

Child Data Management Services

**What services we offer providers?**

- Input and track child and family data
- Provide support to maintain attendance and immunization records
- Assist with implementation of electronic sign in-out signatures
- Assist with implementation of Minute Menu CX for food program requirements

**How our services will be delivered?**

- Procare child data management software
- Minute Menu CX food program management software
- Box.com

**Why our services help administrators?**

- Time and cost savings
- Provides remote access to data
- Reduces doubly entry of child information
- Automates child and family data to assist with meeting regulatory agency requirements
- Minimizes paperwork and need for document retention
- Reduces errors and maximizes reimbursements

How we make it happen?

**Provider Setup**

- Meet with administrator to go over training schedule
- Collect and scan all child and family data
- Install the child data/food program management software

**Automate Child & Family Data / Data Integration**

- Retrieve all child and family data from secure file sharing/storage database
- Enter all applicable child and family data into the child data management system

**Ongoing Child Data Management Services**

- Provide monthly enrollment status reports to providers
- Provide ongoing training and support on the child data and food program software

ONBOARDING PROCESS
### Benefits of Automation

#### Time and Cost Savings
- Provider no longer needs to enter child data multiple times with using the child management and food program software.
- Access to software at a low cost.
- Reduced staffing needs with the support services offered.
- Significant time savings using food program software allowing electronic submission of monthly claims.

#### Stronger Business Foundation
- Software and specialized tools help improve center’s internal processes.
- Increase in reimbursements from food program with using food program software.

#### Improved Quality
- Provider has time to focus efforts on staff development and family engagement.
- Available resources to purchase program supplies and materials for center.

### Questions
Southwest Human Development
Phoenix, AZ

- Arizona’s largest non-profit agency
- Includes more than 40 public + private programs serving 135,000 children and families including: child health and welfare, disabilities, Head Start/Early Head Start, training and education.
- Delivers professional development, training and coaching statewide
- Additional services include mental health, disabilities, early literacy, child welfare, and more
- Centralized administration for all programs & services that employ 900 staff

SWHD Data Informed Practice

- Delivers data informed practice that simplifies documentation and communication.
- Provides targeted embedded professional development interventions.
SWHD Data Informed Practice

- Simplifies aggregation for data informed program decision making.
- Results in continuous quality improvement that drives leadership and organizational practice.

Explore Shared Services

- Opportunities Exchange website: [www.opportunities-exchange.org](http://www.opportunities-exchange.org)
  - Profiles of current alliances
  - Tools, such as examples of management agreements
  - Articles and presentations
  - Videos and multi-media