



Community of Practice Discussion Guide Tools and Resources

1/6/11

Overview

There are three key sources of information, tools and resources regarding Shared Services:

- Opportunities Exchange website: www.Opportunities-exchange.org
- Early Learning Ventures website: www.earlylearningventures.org
- Alliance for Early Childhood Finance website: www.earlychildhoodfinance.org

Some information appears on more than one website, but we encourage you to visit all three, as each presents Shared Services resources from a slightly different perspective.

Current Tools Available for Alliance Sponsors, Members and Funders

Understanding Shared Services

Potential stakeholders may find a wealth of written materials about Shared Services on the websites above. In particular:

- Louise Stoney's article in *Exchange* magazine, October 2009:
<http://www.organizational-services.com/sharedservices/Exchange-FINAL-189-Cover-Story.pdf>
- John Weiser's interview in *Stanford Social Innovation Review*:
http://www.ssireview.org/opinion/entry/creatively_combining_the_back_office_a_series_on_shared_service_alliances/
- Video of example of Shared Services: <http://www.youtube.com/watch?v=tesdOwgINhY>

Self Assessment

A potential Alliance sponsor must determine if this is an appropriate role for its organization. Successful Alliance sponsors – leaders, employees, and boards – have most or all of the following characteristics: leadership, access to providers, financial stability, access to a variety of funding streams, openness to innovation, commitment to excellence, entrepreneurial energy, and risk tolerance.

Tool: Alliance Sponsor Self Assessment - <http://opportunities-exchange.org/wp-content/uploads/Self-Assessment-Key-Criteria-for-Successful-Alliance-Sponsor.pdf>

Advisory Council

Establishing an Advisory Council provides a means of building critical support and buy-in among those who will be important to the success of the Alliance. Advisory Council members could include: funders (community foundations, United Way, local private foundations, local businesses), child care administrators, child care provider association leaders, strong ECE providers and thought leaders, and Alliance sponsor Board members.

Tool: Advisory Council membership and meeting agenda example - <http://opportunities-exchange.org/wp-content/uploads/GAQCC-Advisory-Council.pdf>

Provider Research

Research is critical to understanding what offerings will be most attractive to ECE businesses, and which organizations are capable of providing them, while also offering the opportunity to generate interest among potential Alliance members. A combination of research tools may be useful, including the following:

- Surveys to quickly gather comparable information from many people
- Focus groups to allow people who share common interests to explore ideas together
- Individual interviews to explore a subject with detail and frankness

Tools to illustrate potential Alliance services/benefits:

- Video of example of Shared Services: <http://www.youtube.com/watch?v=tesdOwgINhY>
- Alliance graphic and list of potential alliance services - <http://opportunities-exchange.org/wp-content/uploads/Alliance-description-pdf.pdf>
- ECE Shared Resources web platform:
 - homepage: www.ecesharedresources.com
 - website demo: <http://opportunities-exchange.org/wp-content/uploads/ECE-Shared-Resources-demo.pdf>

Research Tools:

- Provider Survey example: <http://opportunities-exchange.org/wp-content/uploads/Pre-Focus-Group-Survey-Atlanta.pdf>
- Focus group script example – center directors: <http://opportunities-exchange.org/wp-content/uploads/Focus-group-script-centers.pdf>
- Focus group script example – family child care providers: <http://opportunities-exchange.org/wp-content/uploads/Focus-Group-Script-FCCs.pdf>

Implementation Committee

Implementation Committees consist of providers who can help think through how to structure the Alliance, what products and services to offer, acceptable membership pricing, and other key decisions needed to launch the Alliance. It is helpful to include providers who are enthusiastic about the Alliance’s potential, have helpful skills and resources, and whose endorsement of the Alliance will help generate trust and interest among a broader group of providers.

Tool: Implementation Committee Agenda example - <http://opportunities-exchange.org/wp-content/uploads/Implementation-Committee-agenda.pdf>

Alliance Services and Structure

After determining the attractiveness and potential to deliver Alliance services/benefits, these services must then be analyzed to determine their potential costs and staffing requirements. Then a range of potential Alliance structures should be examined. Two levels of service can be provided: Shared Services on the Web, via the ECESharedResources platform; or Shared Services In Depth, with shared administration and staff. In some cases it will make sense for a single hub to offer a wide range of services. In other cases more

than one organization might serve as an Alliance hub. For each scenario, a rough estimate of potential income and expenses should be developed.

Tools:

Shared Services on the Web

- *ECESharedResources* web platform: www.ecesharedresources.com
- *SharedSource Philadelphia*: <http://opportunities-exchange.org/wp-content/uploads/DVAEYC-Flyer.pdf>
- *Georgia Alliance for Quality Child Care*: <http://opportunities-exchange.org/wp-content/uploads/GAQCC-flyer.pdf>
- *Webinar – Helping ECE Providers Improve Food Quality and Reduce Food Cost*: <http://www.box.net/shared/2tv5ricnyl>
- *Example of food price comparison analysis*: <http://opportunities-exchange.org/wp-content/uploads/Food-price-comparison-example.pdf>

Shared Services In Depth

Staffing services memo describing six ECE staffing initiatives - <http://opportunities-exchange.org/wp-content/uploads/Staffing-Services.pdf>

Structure

See <http://opportunities-exchange.org/resources/tools-and-information/> - the following sections:

- *Alliance and Management Agreements*
- *Governance and Structure*
- *Job Descriptions and Organizational Charts*

Membership Criteria and Pricing

Membership may be limited to those providers who meet certain criteria, such as geography, provider type, and program quality. Because quality, in particular, allows the Alliance to differentiate itself as a “brand”, the quality requirement for membership should be easily understood by consumers and funders.

Tool: Pricing and Quality Practices Among Key Alliances - <http://opportunities-exchange.org/wp-content/uploads/Pricing-and-Quality-Practices-and-Learning1.pdf>

Funders

Most Alliances need start-up funding until they attain sustainability (generally 1-3 years). Eventually membership fees (perhaps augmented with other third party funds) will support the Alliance, but it takes time to build up the membership to the point where fees offset Alliance costs. Funding sources should be explored primarily with local funders and businesses that understand the market and will be responsive to business and quality improvements.

Tools:

- See <http://opportunities-exchange.org/resources/tools-and-information/> - “Fundraising” section
- *Direct funders to:*

- Louise Stoney's Shared Services Policy Brief: <http://www.organizational-services.com/sharedservices/Stoney-ELV-Policy-Brief.pdf>
- Louise Stoney's article in Exchange magazine, October 2009: <http://www.organizational-services.com/sharedservices/Exchange-FINAL-189-Cover-Story.pdf>
- John Weiser's interview in Stanford Social Innovation Review: http://www.ssireview.org/opinion/entry/creatively_combining_the_back_office_a_series_on_shared_service_alliances/
- Anne Mitchell's Cost, Quality and Shared Services presentation: <http://opportunities-exchange.org/wp-content/uploads/2010-Conference-Cost-and-Quality-A.-Mitchell.pdf>

Business and Financial Plan

The Business and Financial Plan is a blueprint for management action in launching the Alliance. An important component of a Shared Services plan is identifying what existing resources and personnel can be redirected or restructured to support the Alliance. The business plan should include at least the following elements:

- Operating model, including staffing, roles, responsibilities of partners
- Benefit delivery (e.g. via web, in-person, or both)
- Geography
- Timing
- Membership requirements, including quality criteria
- Membership benefits
- Membership pricing
- 3-year financial projections

Tools: See <http://opportunities-exchange.org/resources/tools-and-information/> - "Implementation and Business Plans" section

Evaluation

Building evaluation into the Alliance plan is critical. Not only will most funders require measurement of success against objectives, but effective evaluations provide important diagnostic information to guide the Alliance as it develops.

Tools: See <http://opportunities-exchange.org/resources/tools-and-information/> - "Evaluation" section

Potential Tools to be Developed

Alliance Members:

- Self-Assessment for potential Alliance members – is this right for me?
- Benefits of joining Alliance, quantified where possible
- Concerns about joining Alliance, and how to ameliorate
- Evaluation of results vs. expectations, diagnostic tool for mid-course correction

Funders:

- Funding assessment: Given limited funds, why is Shared Services the right investment in this community at this time?

- Costs and benefits: What are the likely philanthropic costs to create Shared Services in my community? What outcomes are likely to result?
- Evaluation: How can we know if Shared Service Alliances are delivering the benefits promised?