

# Startup Kit: Guide to Developing a Shared Services Alliance

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## BACKGROUND

The process of starting a Shared Services Alliance can seem daunting. Those interested in starting an Alliance, or helping one to launch, often ask: What should be done first? How long does it take? Who should get involved? How can one ensure long-term sustainability? The purpose of this guide is to provide potential Alliance stakeholders – Hub organizations, early care and education (ECE) providers, funders, and intermediary organizations – with a general outline of the work required to develop an Alliance. The Shared Services framework can also help a multi-site early care and education corporation (non-profit or proprietary) strengthen program quality and sustainability. See this [Multi-Site Guide to Shared Services](#) for information on the steps involved in applying the Shared Services framework to a multi-site organization.

## What is Shared Services?

Delivering sustainable, high quality early care and education (ECE) requires that providers have the capacity to do both Pedagogical and Business/Administrative tasks well. Shared Services is a framework or organizational structure that allows providers to pay attention to providing high quality teaching and learning (pedagogical leadership), while at the same time making sure the business and administrative tasks that support a high quality approach are performed well (business leadership). In a Shared Services Alliance, multiple ECE sites pool needs and share resources – including staff, information, skills and funds – in order to improve the long-term capacity to provide high quality care.

## **What is a Shared Services Alliance?**

A Shared Services Alliance is an organization comprised of multiple center- or home-based ECE programs (members) that have agreed to share specific costs and resources via a collaborative governance structure. The design of each Shared Services Alliance is unique to its participants, but all share the goal of strengthening business and pedagogical leadership across participating sites, by creating structures that enable sharing of staff, information and resources.

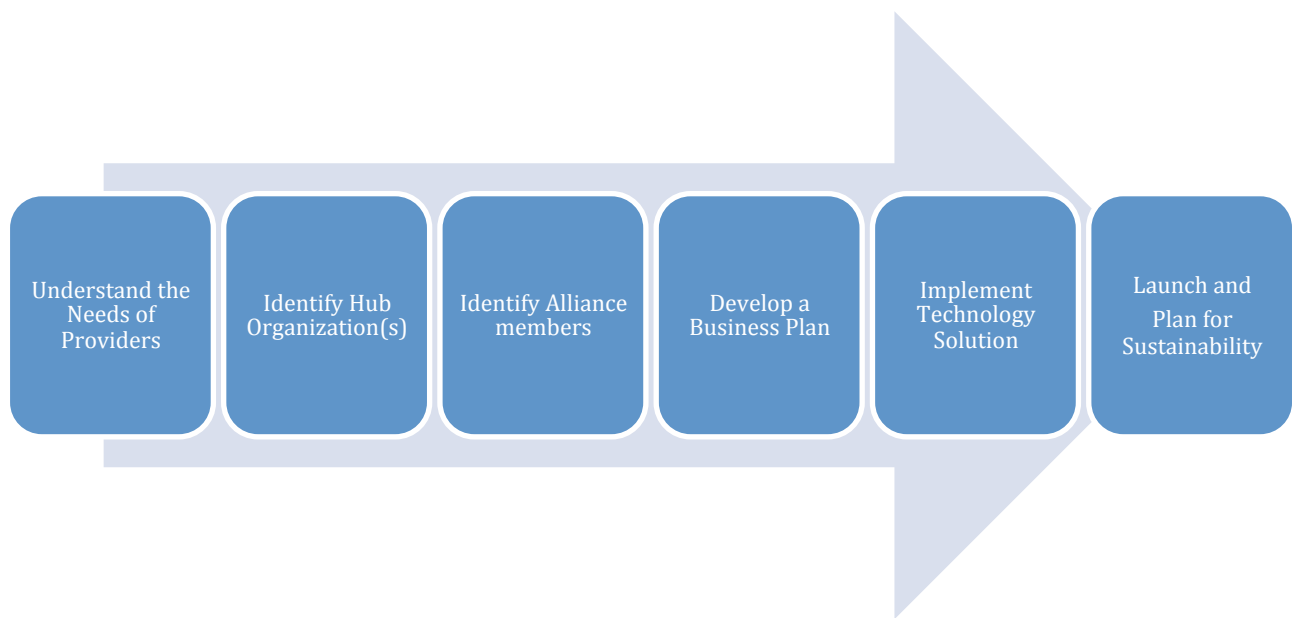
## **What is an Alliance Hub and what does it do?**

An Alliance Hub is an entity that provides one or more Shared Services to the Alliance members. The Hub could be a large center, another type of organization such as a Resource and Referral agency, or a central administrative office. Members pay for the services provided by the Hub; therefore services must be delivered in a cost effective way so that the fees for participating in a Shared Services Alliance are more than offset by the savings/revenue generated. Alliance Hubs can offer a range of shared services to their members, such as:

- Business Leadership
  - Bookkeeping, billing and fee collection
  - Enrollment management
  - Marketing support
  - Fundraising and fund development
  - Data collection and grant reporting
  - Staff recruitment and substitute pool
  - Janitorial and maintenance services
  - Joint purchasing
- Pedagogical Leadership
  - Reflective supervision for classroom teachers and other support staff, including paid time “off the floor”
  - “Floating” teachers or permanent substitutes, shared among Alliance members, to cover staff planning and reflection time as well as staff call-outs
  - Job-embedded professional development, including communities of practice to enable peer learning among teachers, caregivers and site supervisors; and continuing education with career pathway opportunities
  - Site-based quality support staff, such as mentor teachers, to assist with QRIS, accreditation, Head Start performance standards, and/or licensing compliance

## **GETTING STARTED: OVERVIEW**

While every group and every community is different, the work to develop an Alliance usually involves the following steps (with more detail about each step described further down):



While all of these steps are necessary, they can occur in parallel and/or in a different order. Experience has shown that identifying one or more Hubs is a critical step early in the process. It is also important to involve potential funders in Alliance development early on, in order to maximize their understanding of and commitment to the strategy.

The amount of time required to start an Alliance varies based on the many factors that make each community unique. Based on OppEx experience, it is likely to take at least 6 – 12 months from the time that a decision is made to pursue Alliance development and funding is secured, until the Alliance is launched. Depending on who is involved, and the extent of services offered, the business planning process and launch could take much longer.

## **1. UNDERSTAND THE ECE COMMUNITY'S NEEDS**

The first step is to understand the key and common issues in the local ECE community.

- Are there too few high quality child care “slots” available?
- Are too many providers, especially of high quality, closing?
- Is there lack of sufficient qualified staff?
- Do providers lack capacity in business and administrative practices that could help increase revenues and reduce costs?
- What are the root causes of these issues?

While communities often cite too-low subsidy and/or private tuition rates as the key source of problems, the reality is often more complicated. It is important to sort out those capacity issues among ECE providers for which Shared Services can provide a solution, and begin to explore what specific needs could be addressed. Likewise, there may be other issues best addressed via advocacy for policy refinements; those activities can take place simultaneously with development of Shared Services, but are not addressed here.

As part of understanding needs and goals, it is important to assess how well programs employ the financial management principles of the “Iron Triangle”. What are providers’ typical vacancy rates, the level of bad debt, and the gap between costs and available revenues? These are key financial and operational levers that can make the difference between viable and non-viable businesses, and which Shared Services can help address.

The following article provides information on the Iron Triangle:

[The Iron Triangle: A Simple Formula for Sustainability in ECE](#)

There are a variety of ways to learn about the needs of providers. Once a list of questions is developed, individual interviews can be conducted. Another method is to conduct an online survey. (using a tool such as Survey Monkey). Conducting a broad survey early in the process can generate interest in Shared Services, and perhaps invite providers to participate in a further step.

A few tips for effective surveys:

- Make it short. The easier the survey is to take, the more likely a high response rate.
- Make the questions very clear and easy to understand, especially with a rating scale.
- Minimize the number of open-ended questions, since they can be time-consuming to analyze.
- Make sure someone takes the survey as a test to catch mistakes in how questions are asked.

Based on the needs assessment, what are the goals of the Alliance? What are the desired outcomes that providers could not achieve by acting alone? Some possible examples may include:

Overall Goals

- Reduce stress on center directors, site managers and home-based providers by enabling access to a team of experts in both business and pedagogical leadership

Program Quality Goals

- More/better professional development
- Regular support for classroom teachers, e.g. coaching and mentoring from site directors or embedded, shared staff
- More qualified and consistent staff and substitutes
- Create a Community of Practice within and among staff participating in the Alliance

Business and Financial Goals

- Enable providers to access skilled financial management
- Improve fiscal health by increasing revenues and reducing costs
- Improve and simplify regulatory and standards compliance
- Access valuable services typically unavailable with size and scale, e.g. facilities management, Human Resources and employee benefits, and accounting services
- Improve wages and benefits by reinvesting resources in classroom staff

Articulating clear goals will help determine which strategies to pursue, and how to prioritize what to pursue initially vs. over the longer term.

## 2. IDENTIFY ONE OR MORE HUBS

No matter which services are important to providers, a successful Alliance needs an organization that can provide those services. There can be more than one hub; for example one might provide business leadership services while another may be more skilled at pedagogical (teaching and learning) leadership. And a Hub can be located outside the local community, if services are available through a virtual/online connection.

It is critical to focus first on which organizations have the capacity to be a Hub. One approach is to look at ECE organizations and identify the one(s) that have key strengths in pedagogical and/or in business leadership. Some potential examples include:

- A large successful child care program that has achieved quality and sustainability through good management and economies of scale
- A CCR&R or other child care intermediary organization that has experience with functions such as child care subsidy billing, professional development and mentoring, USDA food program management, etc.

Another approach is to look at organizations strong in administrative and business practices, not be in the ECE field but which have a vested interest in building capacity in the ECE sector. Examples include:

- A back-office or property management organization with strong expertise in billing, accounting, maintenance, HR, and related administrative functions
- A community or family foundation with a deep connection to the local ECE community and a willingness to play a deeper role in operations
- A human services agency whose mission “connects” to ECE (e.g. early intervention services, adult education agencies, etc.)

Organizations thinking of becoming a Hub should do some self-assessment to determine the degree of fit (see [Characteristics of a Successful Shared Services Hub](#)). Successful Alliance Hubs will have most or all of the following characteristics:

- *Mission Driven* – Wants to work with other ECE organizations and sees this as part of their mission rather than as an opportunity for increased funding
- *Leadership and market credibility* – Trusted leader in the community, or able to quickly build trust among providers and funders
- *Access to providers* – Knows the provider community well and has the capacity to reach out to and successfully engage providers in an Alliance approach to service delivery
- *Financial reach and stability* – Has sound fiscal management capacity, with dedicated and skilled fiscal management staff and experience with automated information technology for billing, data collection and overall fund management
- *Access to a variety of funding streams* – Already has, or is able to tap, multiple funding streams
- *Innovation* – Leadership, board and staff are open to new ideas and approaches, willing to “think outside the box,” and experienced in developing promising new approaches to old problems
- *Commitment to excellence* – Leadership, board and staff are willing to do the internal and external work needed to raise the bar on quality service delivery

- *Entrepreneurial* – Leadership embraces an entrepreneurial way of thinking and uses this entrepreneurial energy to effectively engage the staff and board
- *Risk tolerance* – Leadership, board and staff are willing to take risks and organization is stable enough to launch a new endeavor that may not pay for itself in the short term

One caveat: A Hub should NOT expect that a Shared Services Alliance will generate profit for their organization. The purpose of an Alliance Hub is to create a legal and administrative structure that enables services at scale, so that participating centers and homes can share the cost of both business and pedagogical leadership and generate savings (in both time and money) that can be reinvested into classrooms. Because of the work and funding required, becoming a Hub should only occur if the overall objective is mission-related: to help participating centers and homes build capacity to provide sustainable, high quality care.

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A successful Alliance will, in time, be self-supporting and able to generate enough revenue to cover costs. However, in the short term, startup funding will be needed. Ongoing third party funding may be required for some services as well (e.g. comprehensive services for high-need children and families, more intensive professional development, etc.). Some communities have utilized a competitive application process to select a Hub Organization.

### 3. IDENTIFY INTERESTED MEMBERS

Alliances come together in many different ways. When a group of providers initiates a Shared Services Alliance, they self-select into the group. In some instances, a third-party entity serves as a catalyst to incubate an Alliance. When this happens, an initial group of providers will be selected to work as the “founding members”. However they enter the Alliance, providers must recognize and embrace the following principles:

- Participating programs must be willing to operate differently than in the past, including a willingness to re-configure and possibly reduce the number of staff positions.
- Trust among and between members and the Hub(s) must be present, or must be quickly established, as members will need to share information and data, related to children/families, the organization, and financials, with the Hub for meaningful business leadership to occur.
- Shared values around program and quality issues

It is often helpful to begin with organizations familiar with each other and/or the Hub organization(s), perhaps through a community organization, learning circle, or ECE support Alliance. Sometimes it makes sense to start small, such as a partnership of 2-3 providers, and gradually expand the partnership/Alliance as experience and confidence increase.

Because Shared Services is a different operating framework than is typical, potential Alliance members, and their boards, must be open to changing the way they operate. This may include issues such as staffing strategies, sharing data and information with others (the Hub, and other

Alliance members), and working on issues collaboratively with other providers. A common misperception is to assume that local ECE providers are competitors, and therefore not viable partners in an Alliance. On the contrary, centers and home-based providers who participate in Alliances quickly learn that fellow providers often share similar needs and resources, and that it is possible – and indeed could be beneficial to everyone – to work together toward common goals.

It is important to define criteria for Alliance membership/partnership, both initially and as the Alliance grows. A key role that an Alliance can play is to demonstrate – to families and funders – how its members differ from other providers *because they are part of a larger whole*. To effectively differentiate by quality, it is important to select a measure that articulates the difference clearly. In states with Quality Rating and Improvement Systems (QRIS), an Alliance can require all members to participate in the QRIS and select a specific star rating as the standard to which all members should aspire. Selecting QRIS as the quality standard often has the additional benefit of ensuring that Alliance members have increased access to technical assistance and funding linked to quality. In states with no QRIS, or where QRIS is voluntary and not widely utilized, other quality measurements can be used, such as:

- Classroom Assessments, based on Environmental Rating Scales (ITERS, ECERS, and FCCERS), CLASS or another standardized tool
- Quality measurements implemented by state or local government ECE agencies
- Accreditation by national organizations, such as NAEYC, or participation in an accreditation facilitation initiative

#### 4. DEVELOP A BUSINESS PLAN

The Business Plan is a blueprint for launching the Alliance. You will need to think about the experience and skills needed in a management team to successfully launch. Even if you work with outside consultants to develop the plan, it is important that staff responsible for the Alliance launch prepare much of the detail. There are two reasons for this. First, having staff prepare the details keeps the consulting costs down. Second and more important, having management draft the details means that they will be intimately familiar with the road they are about to travel, and they will have ownership over the results.

The **Business Plan** should include at least the following elements:

- Governance Structure, including:
  - Roles and responsibilities of all partners - summary of the MOU or other Governance document
  - Structure of the Alliance – organizational chart that delineates relationships among partners
- Description of Initial Services to be shared
- Staffing – who will do the work and what is the FTE calculation?
- Budget – start-up expense and at least 2 years of operating, including self-sufficiency plan
- Metrics – what data will be tracked? How will you measure success?
- Implementation Timeline

### *Governance Structure*

It is important for everyone to be clear about roles and responsibilities. These issues are unique to each Alliance and should be spelled out in a governance document such as a **Contract** or **Memorandum of Understanding**. Key issues in this document are:

- Who will perform what tasks?
- What is the timeline for assigned work?
- What information and data will be shared and how?
- How will decisions be made, e.g. through a contract, as a collective, as Board members of a new entity, etc.?
- How will the cost of providing services be covered during startup and ongoing?
- Will there be a new entity created and/or will there be a “sponsoring organization” (for example, a local community foundation) that will provide the physical and/or financial “home” for the Alliance? [It should be noted that some funders prefer utilizing an existing organization rather than creating a new 501c3, if possible].

Opportunities Exchange has provided an assortment of management agreements to offer guidance in the development of these documents:

[Shared Services Central](#) -> Management Agreements

### *Initial Services*

In planning the initial services to be shared, it is important to focus on those services that:

- The Hub can effectively provide – it is important to have some “early wins” to build confidence and trust among members of the Alliance
- Would be attractive/beneficial to the members.

Identifying a Hub’s potential services is an important first step. However, what a Hub can do must be tempered with what providers want or need, and the degree to which they are willing to change their operating procedures. Technology is usually a key factor, since data and information will need to be shared. Therefore, part of the equation will involve both hardware and software capabilities and resources among the Hub(s) and members.

A combination of research tools, in addition to the survey discussed above, may be useful to identify attractive services from the provider’s perspective, including the following:

- Focus Groups – Focus groups can be effective for a smaller group that shares common interests – such as a group of family care providers, or a group of providers in a particular geographic area – to explore ideas together. When possible, focus groups should be led by a facilitator skilled at managing a group and shepherding a discussion to get the desired information.
- Site visits – There is no substitute for the level of detail and depth of exploration that can be gained from a face-to-face discussion at a site visit. This allows issues to be explored in more depth than in surveys or focus groups, respondents can speak freely and confidentially about



sensitive subjects, and it provides an opportunity to observe the program and its management “in action.”

Opportunities Exchange has developed a detailed form to assist both the program and the Hub in understanding their operations and identifying opportunities for greater efficiency and effectiveness. The Iron Triangle Worksheet can help assess how programs are faring on the critical metrics of the child care business model.

[Shared Services Central](#) -> Alliance Design and Business Planning -> Provider Assessments -> Shared Services Audit Questionnaire

[Shared Services Central](#) -> Business Leadership -> Iron Triangle Worksheet

### *Staffing*

Once you determine what services will be offered, the next question is, who will actually do the work? One **important word of caution** when establishing a new Alliance: the tendency is to create new jobs with titles like “Alliance Coordinator”.

Remember that any new positions created must be sustained over time, after start-up funding is expended.

An alternative is to identify the tasks to be done and then determine the best way to accomplish the work. More often than not, it is best to using existing or part-time staff – remembering that business automation tools typically reduce the number of hours it takes to complete a task. (As an example, in one Alliance, a center’s administrative staff person was spending well more than a day a week preparing payroll, using paper time sheets and calculating wages by hand. The move to employee swipe cards and a payroll service brought that time down to one hour.)

**Caution:**  
*When establishing an Alliance, the tendency is to create new jobs with titles like “Alliance Coordinator”. Remember that any new positions created must be sustained over time, after start-up funding is expended. An alternative is to identify the tasks to be done and the best way to accomplish the work, using existing or part-time staff.*

### *Budget*

Identifying the cost of providing services involves two steps. First, the Hub must estimate the incremental cost to their organization. This may involve hiring additional staff, adding hours to current staff, hardware and software costs, and more. Typically there are one-time start-up costs as well as ongoing expense. Second, the Hub and members must agree on how those costs will be covered. While these costs can often be subsidized by private funding during the startup phase, members should be clear about the expectations of paying for Shared Services after private funding goes away.

Key to this agreement will be helping providers to understand how the Alliance is both saving money (including the cost of staff time) and increasing revenue. The graphic below illustrates how a Alliance improves the financial position for a **child care center serving 65 children**.

## Expenses

	Before Network	After Network
Teaching/Supervisory Staff	\$450,000	\$450,000
Admin Staff	\$150,000	\$54,000
Food & Supplies	\$40,000	\$37,000
Acct / Leg / Insurance	\$15,000	\$0
Other Operations	\$50,000	\$48,000
Prof. Development	\$4,000	\$2,000
Totals	\$709,000	\$591,000
Total Savings to Center	\$118,000	

## Revenues

Revenues for this center increased by \$35,000 in the first year, due to improved fiscal management and full enrollment.

**Reduced expense (118,000) + Additional revenue (35,000) = \$153, 000**

To support shared administration and/or to invest in quality improvements in the center

### *Metrics*

Tracking financial information such as enrollment rates, bad debt, cost of care, and percentage of administration vs. classroom staff in personnel expenses, is critical to the ultimate success of the Alliance. Having this information is important for several reasons:

- Member agencies will have a clear understanding of how the Alliance is improving their financial position, and how/why it is important to shift some of those resources into sustaining the Alliance with member fees
- Alliance members will be empowered to make strategic investments in critical areas of their program – for example, staff time off the floor to support Pedagogical Leadership, or compensation and benefits for staff
- Positive financial results make a strong case for funders and policy makers to invest in and incentivize the growth of Shared Services in the ECE sector
- Evaluation data informs our work; when we know what works and what doesn't, we can make smart decisions about where to put our efforts

### *Implementation Timeline*

The Business Plan should set goals for each activity in order to keep the process moving forward. Because Shared Services is a strategy to address the critical shortages of time and money, it can be a challenge for members to carve out time for the work required to launch a new Alliance (despite the fact that once launched, the Alliance will “give back” time to members!)

The business plan should address the process for **adding additional organizations and services to the Alliance** after its initial launch. While it is better to keep an Alliance small in the early phase in order to learn from pilot activities, an Alliance should eventually serve enough programs and children to achieve significant economies of scale and specialization.

Opportunities Exchange recommends using a PowerPoint format for developing a business plan for several reasons:

- PowerPoint format is ready to share with stakeholders – board of directors, staff, funders, families in participating centers – from whom buy-in is needed
- Stakeholders are more likely to read and comprehend the plan if it is concise and visual (vs. lengthy narrative format)

The Business Plan does not necessarily need to be a lengthy document, as long as it contains the essential elements. The [Philadelphia Early Learning Alliance](#) created a draft Business Plan in PowerPoint format; other examples are on the [Shared Services Central](#) page of the OppEx website.

## 6. IMPLEMENT TECHNOLOGY SOLUTION THAT ENABLES CENTRALIZATION OF DATA.

Alliances that seek to improve the financial position of child care programs will need to offer business leadership that reduces the cost of operations and improves revenue for their member agencies. These tasks are performed most efficiently and effectively through the use of business automation and data sharing tools that allow the Hub to access financial and program information of each member agency. For this to happen, Alliance members must utilize a cloud based Software as a Service (SaaS) system. While the tendency might be to create a customized technology approach, this can be exceedingly costly and time-consuming. Moreover, there are several affordable off-the-shelf programs, including ProCare, Smartcare, and others, that can meet an Alliance's technology needs.

## 7. PLAN FOR ALLIANCE SUSTAINABILITY

Most Alliances need funding to support three essential phases of development:

- Planning/Feasibility study
  - The detailed process described in this startup guide can be done by staff from agencies interested in starting a Shared Services Alliance; however, since limited staff time is one of the most common reasons for pursuing Shared Services, a planning grant can be enormously helpful
- One-time startup costs, e.g.:
  - Hardware and IT support to create a common technology platform for automating business practices and sharing data between a member agency and the Hub
  - Consulting services for tasks such as meeting facilitation, drafting legal documents, etc.
- Initial operating expense
  - Cost of staff to gather financial data, analyze and report findings, develop action steps with member agency to reduce expense/increase revenue
  - Cost of staff for due diligence tasks to find cost-effective solutions for Alliance-wide needs

Ideally, when approaching a potential funder for launch funds, Alliance members will have a business plan that clearly specifies a pathway to Alliance sustainability – the point at which member

agencies are supporting the cost of Hub services – while simultaneously saving money on the cost of these services without the Alliance.



One of the most important ingredients in the sustainability pathway is the ability for member agencies to reduce expense, particularly the cost of administrative staff. The benefit of a Hub is their ability to perform administrative tasks in less time and with fewer errors than administrative staff at each individual organization. Through the use of automation tools and economies of scale, the cost of these services is driven considerably down. **HOWEVER**, the member agency only benefits if they reduce the number of administrative staff. **Failure to reduce staff (costs) at each member site will likely consign the Alliance to failure.**

The key to sustainability is keeping overhead and administration costs low by building on existing staff and infrastructure. If this goal is achieved, the Alliance is more likely to have the resources needed to not only support the cost of the Hub, but also raise teacher wages, purchase employee benefits or invest in intensive staff development and other quality improvements.

In some cases, ongoing funding may be necessary for Alliances that include supports such as comprehensive health/mental health/social services or deeper pedagogical leadership. In these instances, the Alliance is more likely to secure funding on behalf of member agencies than individual programs seeking funding independently.

Typical sources of funding include: local and regional foundations, churches, private contributions, and government grants. Experience suggests that the most likely funders for Shared Services are local foundations and businesses that understand the local market and will be responsive to the financial and quality improvements that Shared Services offers.

Finally, it is important to underscore that the Alliance development process can take a long time, and often takes twists and turns that cannot be predicted in advance. Alliances are partnerships that require behavior change, creating/building trust, and working together in new ways. It is important to have an intentional strategy to address the change process, and be able to reframe, refine or reimagine plans as the startup process proceeds.

For some insight into funder perspectives, see this document from the 2017 Shared Services Conference session: "[Community and Local Foundations as Shared Services Incubators or Hubs](#)"

## OTHER RESOURCES AND EXAMPLES

The [Opportunities Exchange website](#) includes many tools and resources to guide startup, as well as profiles of existing Alliances, links to their websites, etc. In addition, Opportunities Exchange shares news and updated information through our [Facebook page](#) and Twitter feed (@OppExforECE).

Four Alliances in particular offer excellent examples of a range of startup process, structure, and membership.

### [State Early Learning Alliance, NH](#)

- **Launched** informally in 2006; hired staff in 2009
- **Membership:** 140 members statewide
- **Hub(s):** Central office for Director and Coaches housed at Early Learning New Hampshire; back-office and other services provided through Great North Property Management
- **Staffing:** FT Director, PT Coaches in 8 regions
- **Services:** Web platform, discounts on insurances, heating fuel, financial management, accounting, human resources, legal services, vendor procurement, auditing, cleaning service, and trash removal. Marketing support, facility project bidding and project oversight, 24-hour emergency maintenance hotline, property safety inspections. Some discounts extend to staff and families, saving them each \$1,000+ per year.

### [San Francisco Early Learning Alliance, CA](#)

- **Launched** in early 2015
- **Membership:** 6 agencies operating 8 sites
- **Hub:** Central office, initially housed at the Mimi and Peter Haas Fund
- **Staffing:** 1 FT Director and 2 FT Data Management and Need and Eligibility Specialists
- **Services:** Enrollment, data management and reporting, fiscal management, and human resources

### [Battle Creek Shared Services Alliance, MI](#)

- **Launched** early 2017
- **Membership:** 3 centers
- **Hub:** Battle Creek Community Foundation
- **Staffing:** In-kind staff support of 2 PT directors
- **Services:** Currently building out a set of business and pedagogical supports

### [Richmond Area Shared Alliance, VA](#) (Online profile not yet available)

- **Launched** July 2017
- **Membership:** 3 centers
- **Hub:** Commonwealth Autism (non-profit serving special needs children)
- **Staffing:** Project Coordinator, Fiscal Coordinator, and Technician (all PT)
- **Services:** Tuition/revenue collection and tracking, Accounts Payable, payroll, audit, financial reporting, IT implementation and support; pedagogical supports in development
- See the [Richmond startup story](#), describing background, rationale, planning, and logistical details of this promising new Alliance in a low-income community

Additional resources on the [OppEx website](#):

- Profiles of many Shared Service Alliances across the US at [Alliances in Action](#)
- Tools and Resource topics related to startup at [Shared Services Central](#)
- [Shared Services info-graphic](#) and [Shared Services 101](#) presentation
- [Shared Services Podcast](#): short talk on how and why Shared Services benefits the ECE industry