BRODSKY
Research and Consulting

Using Metrics for Shared Services Evaluation

Presentation to the 2019 Shared Services Conference
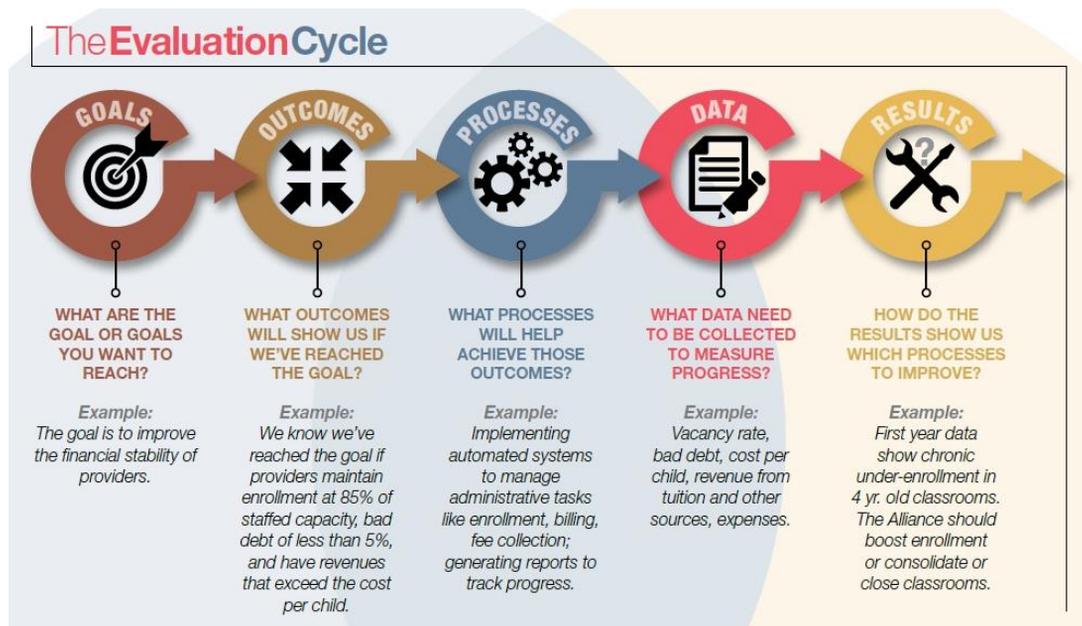
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1

What Is Evaluation?

- A s**ystematic** approach to improving effectiveness -- not a one-time activity, but a continuous cycle of setting goals, collecting data that shows progress towards those goals, and identifying areas of improvement based on those
- **Formative evaluation** provides ongoing feedback in order to drive ongoing improvement (such as tracking how new fee collection strategies impact an organization's bad debt over time.
- **Summative evaluation** assesses an initiative at the end of a defined cycle to determine whether to continue or expand an initiative (such as implementation of a Shared Services strategy).
- Evaluation ties together program goals, theory of action, collection of metrics, and analysis of outcomes

2

The Evaluation Cycle

WHAT ARE THE GOAL OR GOALS YOU WANT TO REACH?

Example:
The goal is to improve the financial stability of providers.

WHAT OUTCOMES WILL SHOW US IF WE'VE REACHED THE GOAL?

Example:
We know we've reached the goal if providers maintain enrollment at 85% of staffed capacity, bad debt of less than 5%, and have revenues that exceed the cost per child.

WHAT PROCESSES WILL HELP ACHIEVE THOSE OUTCOMES?

Example:
Implementing automated systems to manage administrative tasks like enrollment, billing, fee collection; generating reports to track progress.

WHAT DATA NEED TO BE COLLECTED TO MEASURE PROGRESS?

Example:
Vacancy rate, bad debt, cost per child, revenue from tuition and other sources, expenses.

HOW DO THE RESULTS SHOW US WHICH PROCESSES TO IMPROVE?

Example:
First year data show chronic under-enrollment in 4 yr. old classrooms. The Alliance should boost enrollment or consolidate or close classrooms.

3

Alliances and Metrics: Findings

- Most analysis of financial metrics are collected and analyzed by Alliances, not providers
- High-quality data collection is often driven by external accountability, such as non-profit boards or the requirements of funding partners.
- While some Alliances track costs per child, almost no providers track this data themselves. Alliances reported that almost no providers know their costs per child.
- Most Alliances cannot yet ascribe child outcomes to the work of the Alliance *per se*.
- However, some Alliances are engaged in more robust evaluation strategies, which will help build a even more powerful case for their impact on children.

4

Shared Service Example: Battle Creek

- Metrics collected and analyzed
  - quarterly benchmarking of financial information to compare costs to prior year
  - Identification of whether billing is being done correctly and completely
  - evaluation of costs per child to help monitor costs at classroom and child level
  - center director survey including money spent on subs, paid hours for planning and training, and turnover rates
  - staffing surveys to determine staff training and credentials
  - staff satisfaction surveys
  - monitoring of staffing ratios using ELV software
- Future evaluation questions
  - How does kindergarten readiness compare for Alliance sites compared to others?

5

Shared Service Example: Early Connections Learning Centers

Overall Evaluation Strategy
- Organized around school readiness goals, designed to align with Colorado Early Learning and Development Guidelines, as well as TS Gold assessments
- Data is gathered by classroom teams. Baselines established in the fall, and progress reviewed in February, May and July. Documentation is contained in Lesson Plans, TS GOLD Observations and Outcome Reports
- Scores reflect % of children performing within or above widely held expectations

Home Network Evaluation
- Study goals: (1) evaluate the implementation of the Home Network; (2) measure the perceptions and outcomes of the Home Network quality improvement model; and (3) identify the successful features of the model so that may be replicated with other FCCH Networks or in other early childhood or educational settings
- Data collection and metrics: surveys providers, coaches, and families, and child-level scores on TS GOLD

6

Shared Service Example: Palmetto Shared Services Alliance

- Reilly Institute at Furman University is undertaking an external evaluation of the Palmetto SSA
- Key research question: Do the costs savings realized by the SSA result in increased quality?
  - Research question is tied to Palmetto's value proposition: If you become a member, you'll se increased savings in time and money, and than that time and money will be used to increase the quality of care
- Steps of evaluation:
  - Identify goals of SSA
  - Develop detailed logic models in each program area
    - 1) Knowledge Hub (state version of website of shared online resources created by CCA for Social Good – ECE Shared Resources.net);
    - 2) Palmetto Child Care Connect for providers to synchronize their advertising;
    - 3) PSSA University – increase access to quality, affordable PD opportunities for providers.
  - Create a theory of change supported by existing research for each logic model
  - Collect and analyze data

7

Metrics That May Help Your Evaluation Process

- The Iron Triangle
  - Enrollment totals vs. licensed capacity
  - Bad debt (percentage of tuition collected)
  - Per-child costs
- Other Management and Financial Indicators
  - Revenues
- Quality and Outcome Measures
  - Classroom quality
  - Teacher qualifications
  - Student outcomes

8

Effective Use of Metrics in SSA Evaluation

- Clear connection between data collected and organization goals
- Availability of data!
- Foster business/data-oriented mindset among providers
- Effective and efficient data collection procedures and systems
- Repeated data over time to compare costs and other outcomes
- Ability to track child outcomes through ECE experience and into K-12 system

9

Discussion Questions

- How can you tie your organization's goals to outcome metrics?
- What metrics do you collect? Why?
- What would you like to collect but don't? Why not?
- What are the key challenges you have in identifying, collecting, and analyzing metrics?
- What resources are available to you to collect, analyze, and interpret metrics? What resources do you lack access to?
- How will these metrics demonstrate the success of the Alliance, or areas for improvement? How can they be analyzed or presented to tell your story to funders or other stakeholders ?

10