Agenda

- Getting to Know You
- Shared Services in a Nutshell
- Shared Services
  - Why?
  - How?
  - What's challenging?
  - Shared Services value proposition
- Reflections and Discussion
- Next Steps
Getting to Know You

- Name
- Organization
- Something you hope to learn in this session

Shared Services in a Nutshell

From: Working Independently

To: Sharing staff and resources

With Shared Services, programs can be **big** where big matters and **small** where small matters
Industry Challenges

The average child care center in the US serves 75 children. A typical director or owner – whether in a small center or home – is responsible for multiple tasks. Our leaders are overwhelmed & exhausted!
The Challenge of Pursuing Quality

Shared Services: Our Core Values

- **Every director** deserves an administrative team.

- **Every teacher** deserves strong leadership.

- **Every child** deserves a reflective teacher.
The Goal: Work Smarter, not Harder

- Economies of Scale
  - Strategies to take advantage of larger size, e.g. bulk purchasing

- Economies of Specialization
  - Strategies to restructure jobs so staff can focus on what they do well

- Commitment to directing more resources to the classroom
  - Better wages and benefits
  - More job satisfaction
  - Better results for children and families

HOW?

Shared Services
Ranges of Approaches In Action

Sharing Information
Online "Knowledge Hub"

Networking
Some shared resources, e.g. maintenance, training

Sharing Back Office
Billing, fee collection, fundraising, marketing, etc.

Intensive Staff-Sharing
Staff-sharing in many areas, shared core values
Opportunities Exchange

azTOOLKIT
Redesign
Coming this Summer!

Featured Tools & Resources
azTOOLKIT Redesign Coming this Summer!

Opportunities Exchange, March 2019

32 States with Access to Knowledge Hub
September, 2018
A Range of Approaches

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Early Learning Alliance

- 15 member centers, primarily in South and Central Los Angeles
- Customized PD program, supported by successful joint fundraising
  - Ex: trauma-informed care
- Piloting shared substitute program

Imagination Playground received through grant from KaBOOM!
A Range of Approaches in Action

- **Sharing Information**
  - Online "Knowledge Hub"
- **Networking**
  - Some shared resources, e.g. maintenance, training
- **Intensive Staff-Sharing**
  - Staff-sharing in many areas, shared core values
- **Sharing Back Office**
  - Billing, fee collection, fundraising, marketing, etc.

**San Francisco Early Learning Alliance**

- Launched in early 2015; now 6 agencies, 8 sites
- Hub: Central office, initially housed at the Mimi and Peter Haas Fund, now in more central location in SF
- Hub staffing:
  - 1 FT Director - was very strong financial manager for one of the centers; agreed to expand responsibilities to perform same tasks for other centers
  - 2 FT Data Management/ Need and Eligibility Specialists
- Services: Enrollment, data management and reporting, fiscal management, and HR
- Membership fees based on documented/anticipated staff hours required by Hub staff
San Francisco Alliance Results

• Anecdotal results:
  • Alliance membership has grown due to reputation and member centers’ strong results from State audits
  • Increased staff wages as headcount reduced due to Hub services
  • Increased time for director in classroom as administrative tasks absorbed by Hub
  • Improved financial and administrative processes resulting in cleaner audits
  • Goal to establish shared benchmarks and metrics to track results among members

A Range of Approaches in Action
Results: Chambliss Center

- Finances – all sites more sustainable
  - Average enrollment vs. capacity: 92%
  - Average bad debt: 2.9%
  - Revenues: Chambliss raises funding to fill gaps at centers
- Time – Reduced staff time on admin, operations, HR
- Teachers – Better wages, retirement benefits, career ladder
- Family Support – At-risk children and families now linked to comprehensive health, mental health and social services
- Child outcomes – Children score well on kindergarten screening
Wonderschool: Shared Services for Family Child Care

Set Up Assistance

- Provider Readiness Assessment (readiness to start program) for those starting new programs
- Pricing planning – hyper local pricing research conducted, pricing recommendations shared with provider who makes the final call
- Financial modeling – specific to each provider
- Support with licensing (via partnership with local ECE entity or WS consultant)

Wonderschool

Marketing, touring, and open house support

Online promotion (parent groups, social media, etc.) & creation of marketing assets (including Yelp pages) to build awareness
- Customized flyers for local distribution
- Online tour sign-up for parents, tour coaching part of mentoring process
- Online open house & event creation - guide providers, links to RSVP pages, assistance promoting

Enrollment flow

- Online enrollment invitations
- Parents complete site-specific documents online
- Wonderschool track/report enrollment statistics to help home stay full
Wonderschool

**Ongoing operational support**

- Online payment processing (ACH and credit card)
- Financial statements
- $250 professional development stipend per program owner
- Support for parents and providers, as-needed (disputes, payment questions, transition issues, etc.)
- Quality assessment, mentoring, professional development (via Partnership with local ECE organization or WS Consultant)

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### Shared Services in Action:
**New Approach to Staffing and Leadership**

**Pedagogical Leadership**

- Site-based pedagogical leader Classroom observation
- Ongoing reflective supervision
- Child/family supports

**Business Leadership**

**Reflective administration:**
- Data-driven leadership
- Automate data and info
- Track “Iron Triangle data
- Identify trends
- Respond quickly to challenges

**High Quality ECE**
Pedagogical Leaders

- Guide teaching and learning.
- Help colleagues to see themselves as researchers in the teaching and learning process.
- Transform teacher professional development system from a series of sporadic, low impact, compliance-oriented external workshops to a system of collaborative, real-time, sustained efforts that support specific classroom practice and improve program quality.
- Support teachers in attaining professional credentials and completing educational degrees.

Pedagogical Leadership: How Shared Services Helps

- Site Directors freed up from multiple administrative tasks; time and energy to coach teachers in classrooms or plan and participate in home visits or family engagement
- Shared, embedded quality improvement staff to support teachers
- Teacher time ‘off the floor’ to think and plan; opportunities to reflect on their work in professional learning communities (e.g. community of practice among infant/toddler teachers)
- Teachers have opportunities to grow in their jobs, gain degrees/credentials, deepen teaching skills, and more.
Business Leadership

Effective business leaders:

• **Define vision, plan and strategize**: forecast, assess progress, make changes.

• **Manage determinants of business sustainability** such as: enrollment, revenues, expenses, rates/policies, growth, service mix, and compliance.

• **Build infrastructure to maximize efficiencies** including: automation, technology, organization structure, and staff hiring, retention and scheduling.

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### Business Leadership: Focus on the “Iron Triangle”

The Iron Triangle of ECE Finance

- Ensure full enrollment - every day, every seat

- Collect tuition and fees, in full and on time

- Ensure revenue covers cost (tuition, fees, and 3rd-party funding)
Business Leadership: How Shared Services Helps

An effective Shared Services Alliance pools resources to share the cost of administrative staff that can:

- **Increase Revenue**
  - Higher collection rates
  - Fuller enrollment

- **Improve Efficiency**
  - Administrative staff cost are spread across the Alliance
  - Automation reduces the time (cost) of administrative tasks

- **Understand cost of care in each classroom**, to inform:
  - Tuition rates and contracts with partners (like EHS)
  - Fundraising to “close the gap”
  - Classroom mix (how many infant rooms? Some mixed age?)

**WHAT’S CHALLENGING?**

Shared Services
Challenges

• Getting started
  • Trust
  • Agreeing on focus
  • Startup funding – three years
  • Changing the mindset of staff and Board members

• Implementing
  • Leading change inside your organization
  • Managing differences in values, culture and pedagogical approaches across organizations
    • The more intensively you share, the more differences need to be managed

Roles: Making Shared Services Work

Providers
Create local networks:
  • Share data, resources, personnel
  • Maximize web-based tools and resources
  • Fully Implement automated Child Management Systems
  Be willing to change!

Policymakers
Create incentives for provider networks:
  • Embrace automation, fund technology
  • Enable pilots to test new strategies for sustainable, high quality programs
  Be willing to change!

Philanthropy & Business
Create opportunities for provider networks:
  • Support forums to expand information on Shared Services.
  • Help fund start up costs.
  • Support cost of technical assistance, R & D, new staffing strategies, etc.
  Be willing to change!
Shared Services: The Value Proposition

- A strong Alliance has capacity and clout often not accessible to small independent centers/homes
  - Access to more and better resources; ability to negotiate rates, bid jobs, work with regulatory agencies as a group
- A strong Alliance gives members access to skilled leadership and improved financial position:
  - Automated systems to streamline work – including support on-boarding + trouble-shooting technology challenges
  - Metrics to track progress + support to explore range of solutions when problems arise
  - Flexibility to shift resources from administration to classroom, to improve staff wages and benefits
Shared Services: The Value Proposition

- A strong Alliance can improve working conditions for site-based leaders and teachers
  - Better working conditions via supports for professional development, paid planning time, reflective supervision, etc.
  - Internal career lattice, with more employment and growth opportunities within and among linked sites (and potentially more innovative staffing options)
  - Home based providers can focus on children (and their own families) when administrative supports free up time
- A strong Alliance can improve services to families
  - Automated invoicing + easy access to accounts (anywhere + anytime), end-of-year summaries, etc. plus child info
  - Can support a range of family engagement activities

REFLECTIONS AND DISCUSSION
Reflections

- What did I hear today that was intriguing or exciting?
- What did I hear today that was concerning or confusing?
- What’s most relevant to me and my organization?

Next Steps

- Interested in learning more about getting started?
  - Attend “Getting Started with Shared Services” session
    - Wednesday 10:30 am
  - Review materials on “Getting Started” tab on OppEx website
Who Drives Shared Services?

Shared Service initiatives thrive when there is a healthy balance between:
• Positive pressure from funders and regulators, and
• Organic, provider-driven leadership + engagement
Business Leadership:
A New Approach to Program Administration

FROM → TO

- Manual and paper recordkeeping takes staff time, susceptible to errors
- Passive attendance in “business trainings”
- Director or part-time bookkeeper managing finances

TO

- Integrated data systems automatically track enrollment, attendance, billing
- Seamless data transfers to reporting systems
- Active application of business principles to organizational financial management
- Skilled financial manager focused on Iron Triangle metrics

Pedagogical Leadership:
A New Approach to Professional Development

FROM → TO

- Passive recipients of training
- Goals and expectations established by others
- Compliance orientation

TO

- Internally driven
- Program- and job-embedded
- Collaborative
- Continuous professional learning and improvement
- Ownership of professional learning
- Co-construction of goals for growth and practice