Opportunities Exchange

## SUSTAINABILITY + TECHNOLOGY

Making Business

October, 2019

## **PROVIDERS** (CENTERS + HOMES)

HUB

SOFTWARE

VENDOR

Success requires an intentional plan to guide a relationship between software vendor, Hub and participating providers.

> FINANCIAL SUSTAINABILITY

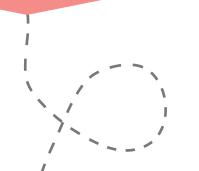
> > the process continued ► www.opportunities-exchange.org 1

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## Data-Informed Leadership:

1 IDENTIFY LEADERSHIP in Hub, Centers/Homes	2 IDENTIFY CHILD MANAGE- MENT SYSTEM	3 CRAFT AGREEMENTS Roles, Responsibilities, Shared Data	4 ON-BOARD MEMBERS Centers + Homes	5 IDENTIFY METRICS
<ul> <li>HUB STAFF: Support on-boarding, lead metrics identifica- tion, track trends, share results with members</li> <li>MEMBER STAFF: Implement on-boarding, help identify metrics + track trends, open to data-driven decisions</li> </ul>	<ul> <li>Survey current usage</li> <li>Review available products</li> <li>Ensure selected software vendor has identified staff for questions, trouble shooting and technical support</li> </ul>	<ul> <li>Clarify roles + responsibilities, data-sharing, fee structure</li> <li>Who signs the Memorandum of Agreement (MOU) or contract?</li> </ul>	<ul> <li>Technical Assistance from software company</li> <li>Offer temporary staff support to load data</li> </ul>	<ul> <li>Key fiscal + program measures</li> <li>Reports linked to Child Mangement System, where possible</li> <li>Identify ways to track saved time</li> </ul>
KEY QUESTIONS + ISSUES	KEY QUESTIONS + ISSUES	KEY QUESTIONS + ISSUES	KEY QUESTIONS + ISSUES	KEY QUESTIONS + ISSUES
<ul> <li>Owners and boards involved early-on</li> <li>Engaged site director</li> <li>Commitment to change</li> <li>Time to engage in change management</li> </ul>	<ul> <li>Enterprise version (necessary for shared data)</li> <li>Cloud-based or on-premise? Or both?</li> <li>Essential functions</li> <li>Key reports</li> </ul>	<ul> <li>Clear agreements in writing</li> <li>Written commitment to change as (all or part of) initial fee</li> <li>Clarity that membership fees will increase over time</li> <li>Clarity regarding Hub accountability to members</li> </ul>	<ul> <li>Initial data entry is a huge hurdle for members: who can help?</li> <li>Identify/empower site-based admin or hire temps to load data</li> <li>Gather baseline data during on-boarding process</li> </ul>	<ul> <li>Common metrics for all members so individual performance can be compared to norms</li> <li>Engage site directors, boards, owners in process</li> <li>Consider desired outcomes when selecting metrics</li> </ul>

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## Data-Informed Leadership: The Process continued

6 DEVELOP	7   GUIDE DATA-INFORM	IED I FADERSHIP	
<ul> <li>DASHBOARD</li> <li>(track metrics)</li> </ul>	Staffing, Fiscal, Policy		
<ul> <li>Tool to track + report metrics</li> <li>User-friendly</li> <li>Baseline data essential</li> </ul>	<ul> <li>STAFFING:</li> <li>Help build site-based leadership + understanding of business metrics</li> <li>Plan to shift \$ from admin to classroom</li> <li>Craft tools/process for on-going reflective supervision</li> </ul>	<ul> <li>FISCAL:</li> <li>Feedback loop: Hub to members</li> <li>Share data/trends</li> <li>Help members reflect</li> <li>Craft management strategies to address fiscal challenges</li> </ul>	<ul> <li>POLICY:</li> <li>Share business leadership process + key metrics with policymakers</li> <li>Ask technology partner to create API links to public systems</li> <li>Use data to inform advocacy; cost in lieu of market prices; waivers for alternative staffing, etc.</li> </ul>
KEY QUESTIONS + ISSUES		KEY QUESTIONS + ISSUES	
<ul> <li>Easy to understand: graphs, charts</li> <li>Able to share with board + owners monthly</li> <li>Aligned with data needed by funders, policymakers</li> </ul>	<ul> <li>Track % personnel admin vs. classroom vs. support</li> <li>Streamline admin staff via fully-implemented technology</li> <li>Identify pedagogical leader at each site</li> <li>Shift resources from admin to paid time for reflective practice (pedagogical leaders + teachers)</li> </ul>	<ul> <li>Enrollment: track + report cost of vacant slots by classroom</li> <li>Bad debt: reconcile billing + collections from public \$ + tuition; track gap</li> <li>Cost per child: calculate costs by classroom; use to inform rates</li> </ul>	<ul> <li>How can data shape improved policy?</li> <li>How can data gathered in automated systems inform rate-setting?</li> <li>Could the Hub manage a subsidy contract on behalf of participating centers or homes?</li> </ul>

