



# Shared Services

## Pilot Project Planning & Implementation Request for Proposal Webinar

Amy Friedlander

# Overview

- ▶ The Tuscarora Intermediate Unit (TIU) recently received a two-year grant from the Heinz Endowments to support a Shared Services Pilot Project on behalf of the PA Office of Child Development and Early Learning (OCDEL).
- ▶ The overarching goal of the initiative is to build both pedagogical and business capacity in early childhood programs.

# Project Components

- 1) identification of opportunities to operationalize shared services models;
- 2) identification, planning, and implementation of sustainable shared services practice at the local level;
- 3) evaluation of the pilot phase of the shared service project.

# Project Goal

- ▶ Promote, enhance and expand shared services at the local level by supporting planning and implementation activities.

## BACKGROUND ON SHARED SERVICES

- ▶ “Shared Services is a management framework that enables center- and home-based ECE providers to build shared organizational capacity, improve teaching and learning, deepen community engagement and promote long-term sustainability.” (Quality At Scale: Supporting Sustainable, High-Quality Early Care and Education Across the Commonwealth by Louise Stoney, November 2016)
- ▶ This is accomplished by sharing staff, skills, funds and costs across a network of centers/family child care homes in order to improve the long-term capacity to provide high quality care.

# SHARED SERVICES framework

- ▶ Every child deserves a reflective teacher;
  - ▶ Every teacher deserves a pedagogical leader; and,
  - ▶ Every director deserves an administrative team.
- 
- ▶ Designed to alleviate some of the financial and business stress that impact the early learning business model
  - ▶ Includes centralizing and streamlining the tasks and roles needed in all sites
  - ▶ Includes reallocation of resources through shared service alliances or networks
  - ▶ Prioritizes business functions by assigning them to subject matter experts
  - ▶ Prioritizes education program by allowing pedagogical leaders to focus on supporting meaningful child-adult interaction and building the elements of program quality

# ELIGIBILITY

- ▶ To be eligible to apply, the lead agency must have a physical office in the Commonwealth of Pennsylvania.
- ▶ The lead agency can be a nonprofit organization or a for-profit business.

# FUNDING LEVEL

- ▶ TIU has dedicated approximately \$160,000 to support planning and pilot projects.
- ▶ TIU anticipates funding 2-4 pilot projects during the 19-month funding period that represent a variety of rural, urban and suburban communities, center and family based home providers, and for-profit and nonprofit entities.
- ▶ Total amount requested cannot exceed \$39,250



# PROJECT AND BUDGET PERIODS

- ▶ The 19-month project period spans June 1, 2018 through December 31, 2019.
- ▶ Applicants must propose a two-part project spanning a 19-month period: four months of planning and 15 months of implementation.
- ▶ The budget format includes two time periods covering: June 1, 2018 through December 31, 2018 and January 1, 2019 through December 31, 2019, and further specifics regarding planning vs. implementation in 2018.

# PILOT PROJECT

## REQUIREMENTS

- ▶ Hold local focus groups to ensure local stakeholders have input into project planning.
- ▶ Implement a shared service model that is inclusive of multiple early learning centers and/or family child care homes. (E.g., a multi-site provider must partner with at least one other provider to qualify as an alliance.)
- ▶ Proposed shared service alliances may be new or existing. An existing alliance must propose to both plan for growth and to expand hub service offerings.

# PILOT PROJECT REQUIREMENTS

- ▶ Each pilot is required to design an alliance that will provide both business support and pedagogical leadership.
- ▶ Each pilot is required to design an alliance that will result in reduced bias and/or reduced suspensions/expulsions by partner early learning programs.
- ▶ Each pilot is required to design an alliance that will result in implementation of positive behavior supports by partner early learning programs.
- ▶ Each pilot is required to develop a sustainability plan.
- ▶ Each pilot is required to provide data to the outside evaluator and otherwise cooperate with TIU reporting and assessment requirements.
- ▶ Each pilot is required to identify a single point of contact to remain in regular contact with the Shared Services Project Consultant

# HUB REQUIREMENTS

- ▶ Implement a shared service model that includes identification of a hub and a set of services that the hub will provide.
- ▶ The hub must provide one or more of the following business services for partners:
  - ▶ Bookkeeping, Billing and Fee Collection
  - ▶ Marketing and Enrollment Management
  - ▶ Shared Administrative Staff
  - ▶ Fundraising and Fund Development
  - ▶ Staff Recruitment and Substitute Pool
  - ▶ Janitorial and Maintenance Services
  - ▶ Joint Purchasing
- ▶ The hub must provide one or more of the following pedagogical services for partners:
  - ▶ Shared Professional Development
  - ▶ Shared Quality Support Staff – mentor teachers, QRIS supports, etc.

# PROPOSAL REQUIREMENTS

- ▶ The format for the proposal includes two components: the application and the budget.
- ▶ Each section must be completed to qualify for review.

# PROPOSAL APPLICATION

- ▶ The application is a Word document with the following sections:
  - ▶ Applicant Information - must be signed
  - ▶ Contact Information
  - ▶ Grant Information
  - ▶ Commitment
  - ▶ Shared Services Components and Narrative
    - ▶ 12 questions plus a reminder regarding the budget requirements

# PROPOSAL BUDGET

- ▶ The budget is an Excel spreadsheet that includes two tabs.
- ▶ The first tab details the 7 month (June 1, 2018 - December 31, 2018). This tab must sub-total planning expenses (June 1, 2018 - September 30, 2018) and implementation expenses (October 1, 2018 - December 31, 2018). The total amount for the first budget period cannot exceed \$18,750.
- ▶ The second tab is for the 12-month 2019 implementation budget. The total amount cannot exceed \$20,500.
- ▶ **The total amount for the budgets for both tabs cannot exceed \$39,250.**
- ▶ All funds must be expended by December 31, 2019.

# ALLOWABLE EXPENSES

- ▶ Contracted Services for consultative or coaching services or stipends
- ▶ Focus group stipends
- ▶ Substitutes so that participants can attend focus groups
- ▶ Existing staff allocated to the Pilot Project
  - ▶ *Staff time allocated to the budget cannot exceed 30% of any FTE*



# ALLOWABLE EXPENSES

- ▶ In state travel
- ▶ Materials & supplies (list items and cost detail)
  - ▶ *Limited to 10% of the grant funds*
- ▶ Administrative Costs (or indirect cost rates)
  - ▶ *Limited to 6% of the grant funds*
- ▶ Communications

# NON-ALLOWABLE EXPENSES

- ▶ **Restriction regarding purchase of equipment:** grant funds may not be used to purchase equipment. Equipment is considered an item in the amount of \$1,500 or greater.
- ▶ Gift cards, Gas cards or incentive prizes.

# Scoring Rubric

- ▶ Lead Organization and Partner Organizations - 20 points
- ▶ Program Planning - 20 points
- ▶ Program Design - 20 points
- ▶ Program Budget - 20 points
  
- ▶ A maximum of 80 points per proposal is possible.
  
- ▶ *Please note: selection process will be based on scoring and prioritizing geographic diversity and distribution*

# Questions due by March 20th

- ▶ Questions must be emailed by 5PM on 3/20/18 to the email address: [shservices@tiu11.org](mailto:shservices@tiu11.org)

# Proposals due by April 13<sup>th</sup>

- ▶ Proposals must be emailed by 5 PM on 4/13/18 to the email address: [shservices@tiu11.org](mailto:shservices@tiu11.org)