Shared Services 101: A Powerful Framework for Strengthening Early Care and Education

A meeting hosted by the National Center on Early Childhood Quality Assurance, in partnership with the BUILD Initiative
Embassy Suites O’Hare, Chicago IL
May 30-31, 2018
Welcoming Remarks

Debi Mathias
BUILD Initiative and National Center on Early Childhood Quality Assurance Partner
Agenda

Day One:
Overview Presentation
Voices from the Field
Team Time
Dinner (on your own)

Day Two:
Opening Reflections
Topical Break-Out Sessions
Wrap-Up
Shared Services 101

Sharon Easterling
Karen Murrell
Libbie Poppick
Louise Stoney

Opportunities Exchange
What is Opportunities Exchange?

- Nonprofit consulting group working with ECE sector
- Mission is to improve outcomes for children by promoting the development of Shared Service Alliances
  - Technical assistance to ECE providers interested in transforming the business of early care and education
  - Work to shape public policy and public financing in ways that incentivize high quality care for young children
Shared Services: Our Core Values

- Every director deserves an administrative team.
- Every teacher deserves pedagogical leadership.
- Every child deserves a reflective teacher.
Agenda

- What is Shared Services?
- What does Shared Services do?
- Examples of how Shared Services works
  - Online
  - “On the ground”
- Lessons learned
- How does Shared Services relate to what I do?
Industry Challenge

Most centers are very small (national average is 75 children.)
The typical director or owner is responsible for multiple tasks.
ECE Capacity: Industry Challenges

- Stand-alone centers or homes
  - Single director responsible for many conflicting tasks
- Lack of scale
  - Small settings that can’t serve enough children to break even
- Limited investment (dollars or time) in quality improvement
  - Few centers/homes have resources to boost and sustain quality
- Unequal competition
  - Mom-and-pops can’t compete with public schools or large HS/EHS providers; many not fully enrolled (especially preschool classrooms)
- Price-sensitive customers
  - Unwilling or unable to pay what it costs to provide high quality care + eager to access free PreK or Head Start slot
Typical Solution: Hire More Staff
Shared Services is about changing these pictures...

- Reinventing “the business model” so that it works – financially and programmatically – for children, families and caregivers
- Creating jobs that have meaning and are manageable and enable professional growth
- Building an organizational structure that is strong and sustainable
Theory of Change: Leadership Capacity-Building

Pedagogical Leadership
- Child development expertise
- Classroom coaching
- Teacher supervision
- Instructional leadership
- Child assessments

Business Leadership
- Full enrollment
- Fee collection
- Cost-per-child calculations
- Fundraising
- Reporting/compliance
- Staffing and structure

High Quality ECE

“Building adult capabilities improves child outcomes” (Jack Shonkoff)
A Strategy to Build Capacity

- A management approach that lets programs be big *where big matters* and small *where small matters*

- A framework that allows a network of centers/homes to share staff and costs, usually through a “Hub” or central office

- A way to strengthen an organization’s **capacity** — both business and pedagogical — by pooling needs and sharing resources
A Strategy to Build Capacity

From: Doing it all alone

To: Sharing staff and resources
What is a Shared Services Alliance?

A “membership” organization through which Shared Services are provided:

- Each Alliance responds to the unique needs and characteristic of that community.
- All Alliances share the goal of strengthening business and pedagogical leadership by sharing staff, information and resources.
- Alliances can range in intensity from sharing knowledge and resources to sharing data and personnel.
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
A Range of Approaches

Sharing Information
Online “Knowledge Hub”

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

Sharing Back Office
Billing, fee collection, etc.

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

- Data-driven leadership
- Automate data and info
- Track “Iron Triangle data
- Identify trends
- Respond quickly to challenges,

**High Quality ECE**

**Job-Embedded Professional Development:**

Reflective administration:
What is Pedagogical Leadership?

- Pedagogical Leaders guide teaching and learning in their programs.

- These leaders encourage teachers to carefully observe, listen, and study together.

- They help colleagues to see themselves as researchers in the teaching and learning process.

- They support Job-Embedded Professional Development:
  - Classroom observations
  - Ongoing reflective supervision
  - Child and family supports
Pedagogical Leadership: A New Approach to Professional Development

**FROM**

- 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
Pedagogical Leadership: How Shared Services Helps

- Site Directors freed up from multiple administrative tasks; time and energy to serve as instructional leaders
- 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
- Children receive the individualized, reflective teaching they need to succeed.
Discussion

- Does the Pedagogical Leadership approach we just described make sense to you? What questions remain?

- How would it be different from what you are currently doing – in your center? In your community? In your State?
What is Business Leadership?

- Define vision, plan and strategize: forecast, assess progress, make changes
- Manage determinants of business sustainability: enrollment, revenues, expenses, policy and procedure
- Staff to meet program goals: Recruit and retain high quality employees
- Build infrastructure to maximize efficiencies: staffing, automation, technology
Business Leadership: Focus on the “Iron Triangle”

The Iron Triangle of ECE Finance

- Ensure full enrollment, every day in every classroom
- Collect tuition and fees, in full and on time
- Ensure revenue covers cost (tuition, fees, and 3rd-party funding)
Business Leadership: 
A New Approach to Program Administration

**FROM**

- 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
Business Leadership: How Shared Services Helps

- Centralized, dedicated staff focusing on specific tasks:
  - Fiscal management: allows for greater expertise, efficiency, fewer errors
  - Enrollment: helps keep slots full
  - Fundraising: helps fill funding gaps

- Automation and technology reduce time and errors
- Skilled business leadership can track trends, forecast fiscal challenges/opportunities, ensure sustainability
- Joint procurement and shared staff can reduce costs
- More time and funds to attract high quality staff
Discussion

- Does the Business Leadership approach we just described make sense to you? What questions remain?

- How would it be different from what you are currently doing – in your center? In your community? In your State?
What are “Hubs” and “Members”?

- **Hub**: entity that provides one or more Shared Services to the Alliance members/partners
  - Could be a large center, another type of organization such as a Resource and Referral agency, or a central administrative office
  - Generally charge membership or contract fees, and/or receive grant support, for providing services

- **Member (or partner)**: child care center or home that agrees to join with others to procure or share services, usually through one or more Hubs
Who Should Join an Alliance?

- Each Alliance is different – qualifications can be determined by the Hub, the members, and/or the funders
- Can be centers or home-based or both; nonprofit or for-profit
- Alliance members must be willing to:
  - Look deeply at how they currently provide services and be open to new ways to work
  - Share financial and program information
  - Lead staff, board, parents through a change process
Who Pays and How Much?

- Two types of Alliance costs:
  - One-time startup – e.g. software and licensing fees for automated information-sharing systems
  - Ongoing – personnel (e.g. fiscal management, quality support), third-party contracts (e.g. janitorial, food services, etc.)

- Goal of most Alliances: raise funds for startup and operational costs while working toward sustainability

- No typical member “fee” – eventually members must cover costs of Alliance

- But lower costs and higher revenues should more than offset member “fees”
Shared Service initiatives thrive when there is a healthy balance between:

• Organic, provider-driven work, and
• Positive pressure from funders and regulators
Roles: Making Shared Services Work

**Providers**
Create local networks:
- Shared data, resources, personnel
- Maximize web-based tools and resources

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**
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!
A Range of Approaches

Sharing Information
- Online "Knowledge Hub"

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

Sharing Back Office
- Billing, fee collection, etc.

Intensive Staff-Sharing
- Staff-sharing in many areas, shared core values
My VIP Savings

Share the good news in your next staff meeting about how staff can access exclusive discounts and earn cash back in their purchases with My VIP savings!

Save Now

New and Noteworthy

- Literacy Teacher Tools (New page)
- Alphabet Knowledge
- Supporting Dual Language Learners

Teacher Discounts

The holiday season is fast approaching, what better way to celebrate than with a reminder that staff can receive discounts at popular retailers.

Invest in Success

Invest in success and help staff meet their CEU requirements by encouraging them to take advantage of low-cost, high-quality online professional development with Quorum e-Learning.

Today's Reading News

Reading Rockets

U.S. Fourth-Graders Lag Behind Other Countries in Reading
Posted: Wed, 06 Dec 2017

Reading Lesson No 1—Teach the Teachers
Posted: Wed, 06 Dec 2017

Laura Ingalls Wilder’s Relationship With Natural World
Posted: Wed, 06 Dec 2017
Move to the Music!

Celebrate Music Monday! Grab your maracas, drums and cymbals to kick off NAEYC’s Week of the Young Child. Check out the child appropriate music videos and get the celebration started.

Go There

New and Noteworthy

- Family Engagement Issue Brief
- Head Start Health and Safety Screener
- Milestones Matter! App
- Reference Sheet - Center
- Reference Sheet - Family

Grab Supplies & Save

Constructive Playthings has all the supplies you need to keep the fun Week of the Young Child activities going all year long! Stock up on art supplies, musical instruments and more all at an exclusive 15% savings!

Families as Teachers

Celebrate the role of families as a child’s first teacher for Family Friday. Share fun ideas from the ‘Especially for Parents’ Pinterest board that will help parents continue the learning at home!

Community Group Support

Our Community Tab supports home-based providers, center directors, the QR process and more! To learn more about our newest cohort model, the Teacher’s Institute of Learning (TIL), see the feature story at the top of the page.
29 States with Access to ECE Knowledge Hub
April, 2018
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- Intensive Staff-Sharing
  - Staff-sharing in many areas, shared core values
State Early Learning Alliance of NH (SELA)

- Started with 10 centers; grew to 35 for several years, then to 180 in 2017
- Fiscal agent: Early Learning NH
- Contract with property management company for:
  - Insurance, risk mitigation
  - HR, marketing
  - Heating fuel, electricity, waste removal, facilities project bidding and oversight
- Members collaborate on:
  - Grant-writing
  - Professional development
  - Regional communities of practice
SELA Results

◆ Programs average $10,000 savings annually (large programs save more):
  ▪ Commercial insurance
  ▪ Utilities – electricity and heating fuel
  ▪ Food costs and classroom supplies
  ▪ Credit card processing fees and more

◆ Facility improvement: time and cost savings, small and large improvement projects

◆ Facility emergencies – plumber/electrician on site within 1 hour

◆ Staff members and families save up to $1000 annually (insurance, utilities, cell phone plans, etc.)
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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 and 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:
  - New members seek Alliance membership based on 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, cleaner audits

- Goal to establish shared benchmarks and metrics to track results among members
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Sound Child Care Solutions
Seattle WA

- Nonprofit 501c3 consortium of 7 centers with central administration
  - 31 classrooms in diverse neighborhoods (12 dual-language)
  - 135 staff from 18 countries

- Shared central functions:
  - Financial
  - Staff recruitment and substitutes
  - Pedagogical leadership
  - Structure for collaborative decision-making

- Critical element: intense focus on working from a sense of meaning and shared core values
Sound Child Care Results

- **Finances**: Stronger revenues, reinvested in teaching and learning
- **Time**: Time savings in administration, operations, HR
- **Teachers**: Better qualified (most have degrees), higher salaries and benefits, internal career ladder, low turnover, strong professional development
- **Core values**: All sites focus on pedagogical leadership, family relationships, racial equity
- **Child outcomes**: All children score well on assessments; top ERS scores in Seattle
Panelists:

- Pam Tatum
  - President and CEO, Quality Care for Children, Atlanta, GA

- Diane Price
  - President and CEO, Early Connections Learning Centers, Colorado Springs, CO

- Chris Bennett
  - CEO, Wonderschool, a national company based in San Francisco, CA
Georgia Alliance for Quality Child Care

- Led by Quality Care for Children
- Primary focus is sharing resources, information and supports
- Rooted in customized version of www.ecesharedresources.org
- Resources aligned to GA’s QRIS. Supports technical assistance staff and providers
- Supports QCC programming, e.g., Farm to ECE, Chefs for Young Children, Early Head Start
- Website: www.qualitycareforchildren.org/georgia-alliance/
Georgia Alliance for Quality Child Care

Business Leadership Approach:

- Administrative Resources + Templates
- Business Support Services + Discounts
- Director to Director Support + Training
- Child Care Business Summit
- On-Line community forums
- Links to Child Care Cooperative: accounting, payroll, personal and business tax services for child care centers
Move to the Music!

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WE MAKE RUNNING A CHILD CARE CENTER A CHILD’S PLAY

Child Care Cooperative provides accounting, payroll, tax, and consulting services to Child Care Centers.

HOW DO WE DO IT?

We combine all services that you receive from different companies, such as payroll, accounting, audit, and tax, into one easy and affordable service. We use the latest technology available to make sure you always have access to all your data in an easy-to-use and secure way. At Child Care Cooperative, we are always a phone call or a visit away. You get all of your questions answered promptly, which saves you time and money. Working with Child Care Cooperative, our services are optimized to serve your business in the most streamlined and cost-effective way. We arrange one flat fee, monthly monthly fee, which is based on the size of your center, with no hidden or extra charges.

ACCOUNTING & BOOKKEEPING
QuickBooks set-up and management
Accurate and timely bookkeeping
Analysis of cash flow and profitability
Reconciliation of bank and credit card accounts
Assets & Capital management

BUSINESS & PERSONAL TAXES
Individual taxes
Business taxes
Payroll taxes
Electronic filing

PAYROLL
Accurate & timely payroll processing
Electronic payroll tax payments
Federal & state tax returns
Easy to understand reports
Georgia Alliance for Quality Child Care

Pedagogical Leadership Approach:
- Director to Director Support and Training
- Expanded Training Links on www.gaqccmembers.net
- Teachers Institute of Learning
- On-line Community Forums
- Used in on-site QRIS TA
Early Connections Learning Centers
Colorado Springs

- Multi-site non-profit with:
  - 4 full-day centers
  - 2 school-based PreK classes
  - 2 off-site school-age programs
  - Drop-in facility at the Courthouse
  - Network of 41 FCC homes
  - Will soon launch 4 infant-toddler micro-centers in public schools

- Although a multi-site organization, previously not organized with a Shared Services framework. Reorganized in 2009, centralizing most functions.
Early Connections Learning Centers
Colorado Springs

Shared Services include:

- Billing/fee collection (including CACFP, subsidy, parent fees, etc.)
- Enrollment management and reporting, data, etc.
- Quality assurance (on-site TA, PD, classroom observations, curriculum support, cross-site learning communities, etc.)
- Child Outcome Assessment training and support
- Family involvement, medical support, literacy, bi-lingual staff
- Staff support, including HR, benefits, PD plans
- Behavioral Health and Family Advocate
- Community Engagement
Early Connections – Pedagogical Leadership Approach

- Center directors responsible for: classroom observations, coaching teachers, monitor GOLD; supervise teachers in classroom and home visits
- Center directors meet every 2 weeks, supported by Curriculum & Instruction Coordinators and VP of Center Operations
- Cross-center teacher learning communities, by age group (e.g. toddler teachers learn together)
- Teacher Representative meeting, agency-wide
Early Connections – Business Leadership Approach

- Joint marketing, via centralized website
- Centralized enrollment
- Billing and subsidy administration
- Fee collection, late fees and discharge
- Fiscal/admin oversight: tracking by center and classroom
- Food program management, meal purchasing, CACFP administration, group purchase of supplies
- HR and benefits
- Maintenance
Early Connections Results

- **Finances** – bad debt decreased to approximately 2% + cost savings
- **Enrollment** – centralized marketing efforts maintain high enrollment
- **Choice for families** – high quality options in center or home based care, full day year-round for Head Start
- **Time** – center directors now focus most of their time on supporting teachers, instead of on administration
  - More time for coaching/mentoring; site directors support teachers
  - Learning communities across sites
- **Teachers** – salaries increased and able to offer other benefits
- **Child outcomes** – 85% of children score “Exceeding Widely Held Expectations” on Teaching Strategies GOLD
Wonderschool (National)

For-profit mission-driven company supporting in-home and nature-based programs:

**Provider support**

- Startup – licensing assistance, program setup, business planning, earnings estimation
- Marketing – website creation and hosting, pricing, customer sourcing
- Enrollment management and support
- Billing and payment processing
- Mentoring, trainings/professional development, network building
- Liability insurance
- Operational support: staff recruitment, quality, children + family support

**Parent support**

- Finding child care when and where it is needed – marketplace
- Ongoing support once enrolled – transitions and developmental support with children, payments, etc.
Powerful online platform

Our online platform guides you through licensing, marketing, tours, payments, daily operations, and everything in between. It allows you to manage your students, parents, and program from one dashboard.

1-on-1 support

Our team of educators, mentors, and business coaches provide guidance and support along your journey in starting or operating your own program.
Wonderschool – Business Leadership Approach

- Developed proprietary software platform powered from cell phone
- Allows providers to manage students, parents, and program from one dashboard
- Enables parents to search, schedule visits, enroll children, make payments via phone or computer
- Support for startup and ongoing operations
- Business metrics to guide hyper-local pricing, marketing, enrollment
- Support for business expansion as providers grow
Wonderschool – Pedagogical Leadership Approach

- Providers apply online to become part of network. Selection criteria:
  - Commitment to high-quality ECE environments
  - Assessment of ECE experience, education, etc.
- Providers accepted into network linked to in-person mentors and needed support for setup and licensing, plus ongoing quality assessment
- Curriculum/philosophy is not prescribed – honor the background & experience of each provider but all providers must utilize WS standards (daily rhythm, outside time, participation in mentoring)
- Training and professional development opportunities monthly (in-person and web-based)
Wonderschool Results

- **Expanding the workforce** – 60% of Wonderschool partners were previously childcare/preschool teachers who had left the workforce. Now small business owners who receive ongoing support from WS

- **Expanding access to high quality care** – marketplace for parents means less time scouring the web for programs, trying to determine who has space, etc.
  - Creation of 500+ previously non-existent slots
  - Growing stability of existing providers who join network already licensed (filling up spots that had previously been open)

- **Expansion into new areas** – bringing more childcare options to communities where waitlists or lack of options have been a major barrier to families & teachers

- **Satisfaction**: 79 NPS (provider score), 4.83/5 (parent score)
Small Group Discussion

Choose a group to discuss the following topics and explore what additional questions you have and what information you want/need:

- Shared Services on the Web — How to Get Started and Deepen Use of the Platform
- Regional and Local Staff-Sharing Alliances — How to Get Started
- Expanding Reach as a Shared Services Hub
- Another topic not listed
Good Morning!
Day Two: Opening Reflections

- What excites you and what concerns you about Shared Services?

- What additional information do you need to move forward?
OppEx Lessons Learned

- If you’re thinking of starting an Alliance, or reorganizing a multi-site with a Shared Services framework, there are lots of thorny issues to think about.

- If you don’t address the thorny issues upfront, they can derail your efforts later…
Startup: Key Success Drivers

- Identification or establishment of hub(s) early in process
- Hub(s) staffed with recognized and trusted leaders
- Local/regional funder with deep knowledge of issues in ECE community – incubator, funder, advocate
- Identification of shared automated system to allow for shared data, reporting, analysis
- Positive early results attract new members
- Understanding hub’s cost of providing shared services is essential for business planning, and for member understanding of costs/benefits
Measuring Results is Critical

Two types of results to measure:

- **Costs and savings of the Alliance itself**
  - How much does it cost to staff the hub and provide the services?
  - Is that cost more than offset by increased member revenues, and member time and cost savings?

- **Impact on members’ business, and ultimately on children and families**
  - How much administrative time is saved?
  - Are increased revenues and saved dollars and hours reallocated from administrative to the classroom?
  - What is the effect on children and families?
Measuring Results (cont’d)

- Important to establish goals and metrics, and collect data, from beginning

- Business Leadership examples:
  - Enrollment vs. capacity
  - Revenue collection
  - Cost per child
  - Time reallocation from Administration to Classroom

- Pedagogical Leadership examples:
  - Paid time off floor for reflective practice and analysis of data from ERS, CLASS, etc.
  - Child outcomes measurements, e.g. TS Gold, Ages and Stages
What Can Derail Shared Services?

- Creating a back-office as just another layer of bureaucracy
- Beginning with overly challenging issue (e.g. substitute pool)
- One or more partners unwilling/unable to participate in shared data/automation platform
- Pricing/fee plan that is not well understood by members
- Weak partner in key role
- Lack of trust and shared vision among partners
- Trying to “impose” without buy-in
Required: A Commitment to Change

Hubs and members must be willing to:

- Look deeply at how currently administer and staff program, and be open to new ways to work
- Agree to focus on common good
- Share financial and program information
- Lead staff, board, parents and stakeholders through a successful change process
Breakout Sessions

- Shares Services on the Web: How to get started and deepen use of the platform
  - Facilitators/Resource People: Pam Tatum, Denise Sayer

- Starting Regional and Local Staff-Sharing Alliances
  - Facilitators/Resource People: Karen Murrell, Louise Stoney, Chris Bennett

- Expanding Reach as a Shared Services Hub
  - Facilitators/Resource People: Libbie Poppick, Diane Price
Tour of Shared Services Resources

◆ Opportunities Exchange website: [www.opportunities-exchange.org](http://www.opportunities-exchange.org)
  ▪ Profiles of current alliances
  ▪ Tools, such as examples of management agreements
  ▪ Articles and presentations
  ▪ Videos and multi-media

◆ Social media:
  ▪ Facebook: “Opportunities Exchange”

◆ Watch for email announcements of events from OppEx
Discussion

- Key take-aways from the break-out groups
- What additional technical assistance or information do you need to move forward?
Thank You!

Safe Travels!