



United Way Shared Services Alliance Technology Services Report

May 18, 2023

Andrew Urban | Carlene Wegmann Todd | August Harris

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Project Overview

The United Way of Greater Austin (UWGA) created the Greater Austin Shared Services Alliance for Early Learning to provide free support and services to community-based child care providers. In doing so these businesses can utilize the resources of the Alliance to become stronger in their work as a business, in supporting their employees, and be able to share best practices and resources. Together, the businesses and the Alliance can support the United Way of Greater Austin goal of increasing the supply of high quality affordable child care throughout the Austin area.

The research and findings reported on within this document are in support of that goal through the following objectives:

- Develop and conduct a baseline assessment of the current IT/tech capacity in the child care Centers
- Research and identify community resources and assets available to small business to improve digital equity and literacy
- Draft recommendations for best meeting the IT/tech needs for the child care Centers through the Alliance

This document details the Seeds for Change Consulting (SFCC) team's research and analysis, the process employed to learn from the United Way's staff and the Alliance-partnered Centers, the findings from the research, and the recommendations based upon those findings.

Team

The team involved in the work included Carlene Wegmann Todd as project lead, August Harris as the financial services expert, and Andrew Urban as the technical services and implementation expert.

Carlene Wegmann Todd

Carlene brings over 29 years of experience in marketing, communications and project management with the last 18 years specializing in online technology projects. Areas of focus include leading evaluation, implementation and management of technology roll-outs, developing marketing and communication programs to support development goals, and leading teams through successful project completion. At her core, she is a problem solver who can't help but look for ways to create process efficiencies in all areas of her projects. She is passionate about helping her clients achieve their mission by managing projects with clear goals, measurable outcomes and open and consistent communication.

As a consultant, Carlene has worked with large National multi chapter organizations to local Austin nonprofits. As the Vice President of Charity Dynamics, a full-service digital agency focused on leveraging

technology, Carlene managed clients such as the ALS Association, American Cancer Society, The Arc of Texas, Chesapeake Bay Foundation, Partnerships for Children, and KLRU Public Television helping grow their digital reach and online donor base. At Convio (now Blackbaud), she worked with Planned Parenthood Federation of America, the ASPCA, KUHT - Houston PBS, Austin Children's Museum and the Alley Theatre of Houston implementing integrated acquisition, conversion and retention strategies while maintaining customer ROI tracking, campaign analysis, cost/ benefit reports and client case studies.

Carlene has worked as a Seeds for Change Consultant since 2005. Over her 17 year association with SFCC she has been a team member or lead on projects with Marathon Kids, GENAustin, Restless Legs Syndrome Foundation, Narcolepsy Network, Texas Reach Out Ministries, Mobile Loaves and Fishes, and most recently, Patriots' Hall Dripping Springs. The projects included website redesigns with technology solutions for processing donations and CRM, SEO site implementations to improve search rankings on Google and increase site traffic, development and implementation of online and offline fundraising campaigns, email newsletter programs, and grant writing. She also maintained the Seeds For Change Consulting website and completed the firm's latest re-design.

August W. Harris III

August has nearly forty years of nonprofit experience serving on the boards of two state agencies and numerous nonprofits.

In his leadership capacities, he has overseen key organizational areas including budgeting and audit and finance. His career in the financial service sector spanning more than thirty years has included all phases of real estate asset management as well as the provision of B2B and B2C services to a diverse range of businesses. August has been affiliated with Seeds for Change Consulting, LLC since 2011 providing expertise in finance, governance, fund development, management, strategic planning, and advocacy. August spent several years working on nearly 20 marketing assessments and strategic program and business plans for various Camp Fire chapters across the United States including several in Texas.

He currently serves the public as a Board Member on the State Bar of Texas, as Chair of the City of Austin's Downtown Commission, and as a Board Member for Preservation Texas. Prior to that, he served as Vice Chair of the Texas Historical Commission. August also has served in leadership roles for numerous civic organizations including Leadership Austin, the Greater Austin Chamber of Commerce, Preservation Austin, the Texas School for the Deaf Foundation, and the Austin High School Continuing Education Foundation among many others. August graduated with a BA in Liberal Arts from the University of Texas at Austin, is a state certified mediator, and holds a Texas Real Estate License practicing with Moreland Properties.

Andrew Urban

Andrew has 30 years of experience in the technology solutions markets which includes over 22 years supporting nonprofits with application and change management solutions. His experience is in the areas of the nonprofit technology landscape, the application of these solutions within organizational processes, and the ensuing staff dynamics to create success. He is passionate about technology being expertly applied to achieve nonprofit mission impact.

To this project, Andrew brings his experience as a consultant, author, and technology solutions veteran serving organizations in assessment work and in the means to implement appropriate technology in a mission-relevant manner. He specializes in seeing the details that impact the big picture, seeing the process changes required, and possesses a broad view of the technology that can create those results.

His consultancy work is based upon the principles in his book, *The Nonprofit Buyer* (2010). In this book he identifies and details best practices for nonprofit buying processes and organizational success with technology solutions.

The concept of "Return on Mission" is the marker to enable nonprofits to marry traditional 'Return on Investment' (ROI) to mission impact. It was recently included as a segment within the book *Focused Fundraising* by Chris Cannon and Michael Felberbaum (Wiley 2022). In his work with these principles Andrew consulted to both organizations for technology projects and to vendors seeking to provide value to mission-based organizations.

Andrew has led sales teams and partnership work at Kintera, Convio, and FirstGiving and his experience also includes Netsuite.Org and Blackbaud. He has served as a technology consultant on several projects for Seeds for Change Consulting and its clients including Big Brothers Big Sisters and Down Home Ranch.

Currently a Senior Director of Market Development at Zuri Group, a nonprofit CRM consultancy with a focus on enterprise higher education, healthcare, and nonprofits, Andrew works with organizations on organizational assessments, data management/business intelligence projects, digital integrations, and CRM implementations.

Engagement Process

To meet the goals of this project the SFCC worked collaboratively with members of the UWGA team in a defined process to gain the desired results.



Step one in any engagement must always be to listen, learn, and get that deeper understanding of the current situation and needs. The Alliance staff was deeply helpful with information regarding the technology decisions that had been made to date and the processes by which the Centers are supported today. This included learnings on the number of Centers, a general understanding of the IT/tech in use, the Brightwheel child care software system licensing decision and capabilities, plus other elements important to know as background prior to working with the Centers.

Step two involved learning from the Centers themselves and how best to communicate with them. A survey, rather than direct conversations with the center staff, was the Alliance staff’s preferred means of gathering the necessary data points due to time commitment for the center staff away from their day-to-day work and other ongoing work between the Alliance staff and the centers.

Through several iterations and with input from Alliance staff, the SFCC team determined it was necessary to have two separate surveys to the two distinct audiences among the Centers. It was apparent that the usage of the Brightwheel childcare management software was the main differentiator between the Centers and how they used the Alliance resources. Two surveys were created: one for those with Brightwheel and one for those without.

Step three began once the survey responses began to be received. The data was analyzed by the SFCC team to look for trends and key takeaways. Based upon these trends and key takeaways the recommendations, which are the foundation of this report, were built.

Step four includes this report as well as the discussion with Alliance staff on how to implement the recommendations included.

In-Flight Scope Modifications

It was determined, through conversation with Alliance staff, that these areas of the original scope were not necessary within this survey as are being managed under other contracts, consultants or by Alliance staff.

- Staffing/retention
 - Confirmed the line item from the original project for “options for staffing or outsourcing of contracts for professional services” is no longer needed.
 - Eliminated several survey questions in the ‘People’ section
 - Business coaching and training questions were reduced and re-focused
- Marketing and communications
 - UWGA staff currently conducting a website assessment
- Payroll solutions
 - Evaluation of payroll/financial software solutions included in the original scope are currently being done by Alliance staff. Financial software solutions were removed from the surveys and this report.

Deliverables

Member Center Survey Process

The core principles in the design of the member center survey centered around the three needs of People, Process, and Technology.

The survey is intended to see patterns of how the center staff are utilizing 'Technology' within the 'Processes' of their work with clients and UWSS that make the lives of the 'People' easier which enables them to focus on the goals of taking care of the children of Austin.

People

In a technology-focused survey, the 'People' portions are not about human resource type issues or whether a center has the right employees to do the work of caring for the children. Rather, it is about how the people are able to understand, utilize, and succeed with the tools and technology provided within the program.

Process

The 'Process' questions within the survey are meant to understand not only the *what* the 'People' are doing with the tools and technology provided, but the *how* they are interacting with it, *how* the United Way Shared Services staff supports them, and *where* these processes can be added, edited, or deleted in order to make the 'Technology' provided the most effective to achieve the desired outcome.

Technology

The 'Technology' piece to this tri-part approach is typically where most organizations start a process like this, but while important of course, the technology is only as good as the processes that support the people who must use the technology on a daily basis. To start, our consultants gathered a baseline inventory of technology currently used. The 'Technology' questions in the surveys focused on whether the technology is or is not supporting UWSS goals of organizational efficiency and client happiness.

Member Center Survey Results

Survey Goals

With the survey being the sole means of data capture from the Centers it was very important to ensure the questions were as thorough as possible, but remain concise enough so as to not discourage participation. The data needed to gather from the survey included information in these areas of interest:

- Hardware
 - Use of currently provided laptops and iPads sufficient or need more?
- Software
 - Use of current software licensed for Brightwheel and if not then why?
- High-speed internet capabilities
 - Wifi usage within the center and issues
- Training needs for both hardware and software
- Support requirements to maintain the hardware and software
- Overall digital literacy of administration and staff

After final collaboration with the UWSS staff, the survey was sent to the Centers on April 16th with a close date for the survey period of April 30th.

Survey Results

At the close of the survey period there were 15 total responses out of 26 Centers. It was unknown how many of these Centers were using at least some portion of the Brightwheel childcare management software. The UWSS staff was aware of some of the Centers who were not using the Brightwheel solution and either used no technology or used another licensed solution.

10 Centers filled out the Brightwheel User Survey. 5 filled out the Non-Brightwheel User Survey. Of the 5 Centers that filled out the Non-Brightwheel Survey, 2 of them actually do use Brightwheel, 1 uses another competitor to Brightwheel (ProCare), and the last doesn't use Brightwheel or another competitor.

Key takeaways from all Survey Respondents

- Brightwheel usage has positively impacted the Centers ability to their work
- Feel competent in hardware usage, but not when something needs fixing
- Have access to high speed internet, but several have issues with it in the Centers
- Training on hardware and software is needed to understand options available

Key Takeaway One - Positive impact of Brightwheel usage

It's hard to underestimate the significance that a software decision can have on an organization to either the positive or negative. Purchasing software which supports multiple critical business functions, but does none well can cripple a business. It can leave the company unable to do the basic elements that are required to keep their business running efficiently.

Choosing well in the software acquisition process means the opportunity for success exists, but is not predetermined because even the best software doesn't work without proper user training, change management, and other such needs. The point of this is to say that the SFCC team, without involvement in the Brightwheel solution purchasing cycle nor a working knowledge at the outset of the project, was concerned that a software decision had been made prior to this type of survey of business users.

It became critically important to understand the breadth of Brightwheel adoption in all of the different modules and to gauge the satisfaction of the Centers using it. The answers came back to the positive and have affirmed the Alliance decision to purchase the Brightwheel solution for the Centers.

The survey could have found any of several outcomes in this spectrum:

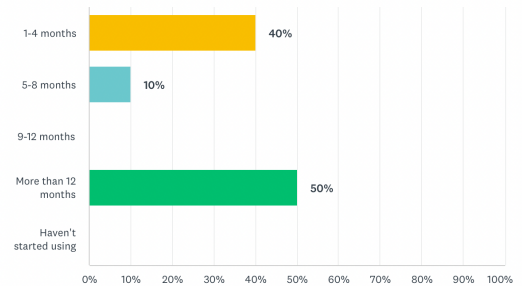
- Love Brightwheel, but haven't implemented much of it
- Don't love Brightwheel, but also haven't tried much of it
- Love Brightwheel, it works, but is difficult and complicated to use for staff and clients
- Don't love Brightwheel, can't make it work because it's difficult and complicated to use for staff and clients

The survey results bear out that the answer is "Love Brightwheel, it's had a positive impact on my staff and clients, but still have more to implement." If we had found a deep level of dissatisfaction, very low adoption of the modules, and other potential negative elements, it would have been a recommendation to review and see if those could be fixed prior to the Brightwheel license renewal that is upcoming in 2024.

It is the SFCC consultant team's view that given the length of time on the solution this is a positive place to be for the Alliance Centers. There is more work to be done, but the decision to move forward with Brightwheel has had an overall positive impact.

How Long have you been using BrightWheel?

Answered: 10 Skipped: 0



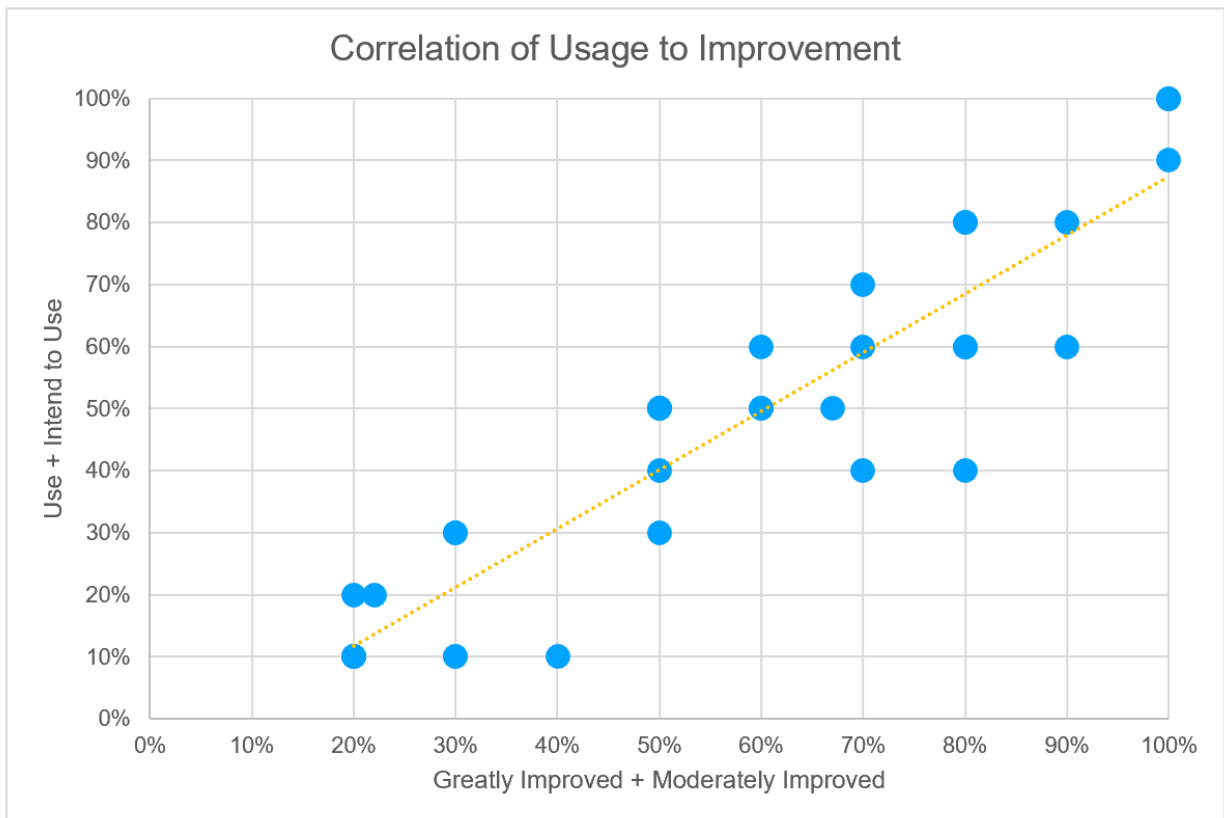
ANSWER CHOICES	RESPONSES
1-4 months	40% 4
5-8 months	10% 1
9-12 months	0% 0
More than 12 months	50% 5
Haven't started using	0% 0
Total Respondents: 10	

The Brightwheel solution is broken into several modules (<https://myBrightwheel.com/features/>). These are:

- Attendance
- Daily Activity Reports
- Communications
- Payments, and Lesson Plans

Each module contains several elements. In our survey results we measured each element of each module to understand if the center was using the element in the module, if they intended to use the element, if they hadn't heard of that element and therefore didn't know it was something they could use, or if they did know of the element, but had made a decision to not use that element.

The scatter plot chart below shows the correlation found in the survey results between a module element usage and whether that usage has improved the operations of the center. It is a clear correlation between usage and positive impact.



This is the detail of the findings in the scatter plot chart above for each module and elements in that module. Here can be seen all of the modules, their elements, and the percentage of Brightwheel survey respondents to each answer.

While not every element is used, even the least used, the Lesson plans module, does have a positive impact to the center where it is being used.

Module Name	Module Element	Use+ Intend to Use	Use	Intend to Use	Hadn't Heard of	Not Using	Greatly Improved + Moderately Improved	Haven't Seen Improvement
Attendance	Contactless Check-in	100%	100%	0%	0%	0%	90%	10%
	Health Screens	50%	30%	20%	0%	50%	30%	0%
	Ratios and Scheduling	60%	60%	0%	10%	30%	60%	0%
	Attendance Reports	70%	70%	0%	0%	30%	70%	10%
	Guardian Management	60%	50%	10%	10%	30%	50%	0%
Daily Activity	Digital Daily Sheets	70%	50%	20%	10%	20%	60%	0%
	Photos and Videos	90%	80%	10%	0%	10%	80%	0%
	Incident Reports	60%	50%	10%	10%	30%	50%	0%
	Health Checks	67%	56%	11%	0%	33%	50%	0%
	Menus and Food	70%	60%	10%	0%	30%	40%	0%
	Activity Reports	80%	70%	10%	10%	10%	60%	0%
Communication	Parent Engagement	100%	80%	20%	0%	0%	100%	0%
	Staff Messaging	80%	50%	30%	0%	20%	80%	0%
	Emergency Alerts	80%	70%	10%	0%	20%	80%	0%
	Reminders	100%	90%	10%	0%	0%	100%	0%
	Calendar	30%	30%	0%	0%	70%	30%	0%
Billing and Payments	Tuition Collection	50%	50%	0%	0%	50%	50%	0%
	One-Time Charges	50%	40%	10%	0%	50%	40%	0%
	Attendance-based Billing	50%	40%	10%	0%	50%	50%	0%
	Mobile Payments	50%	40%	10%	0%	50%	50%	0%
	Discounts	50%	50%	0%	0%	50%	50%	0%
	Subsidy Tracking	30%	10%	20%	0%	70%	10%	10%
Center Management	Enrollment Management	90%	40%	50%	0%	10%	60%	0%
	Online Records	80%	40%	40%	0%	20%	60%	0%
	Detailed Reporting	80%	20%	60%	0%	20%	40%	0%
	Multi-Site Management	30%	20%	10%	0%	70%	30%	0%
	Administrator Approval	22%	11%	11%	33%	44%	20%	0%
	Staff Payroll Reports	20%	20%	0%	0%	80%	20%	0%
Lesson Plans	Learning and Assessments	40%	10%	30%	10%	50%	10%	0%
	State Learning and DRDP	30%	10%	20%	20%	50%	10%	0%
	Customized Assets	20%	10%	10%	20%	60%	10%	0%
	Distance Learning	20%	10%	10%	20%	60%	10%	0%
	Data Rich Reports	20%	10%	10%	20%	60%	10%	0%
	Sharing Controls	20%	10%	10%	20%	60%	10%	0%

Key Takeaway Two - What to do when things go wrong with hardware

In Key Takeaway One we made the correlation between technology usage and the positive impact to a center's business. In Key Takeaway Two we see what happens to a business when the technology does not work.

Hardware frustrations for a small business are amplified because small business owners do not go into their business to be information technology professionals. In our case, they are caregivers and teachers who are there to serve children and their parents.

Wifi doesn't work? Computer not booting up? iPad not turning on or charging? Blinking lights that we don't know what they mean?

Those are amazingly frustrating and time-consuming problems that take valuable time away from taking care of children, serving their employees, and supporting the parents.

Small businesses, like the Centers, are vulnerable to a number of common small business technology issues. However, the nature of the work makes the vulnerabilities that much more of an issue should problems arise. If a clothing store loses a login to a critical system then maybe inventory or part of a customer list is compromised. If a Childcare Center loses a computer or has a careless employee using it for personal use then the identity of children, guardians, and their personal info could potentially be found by those looking to do harm.

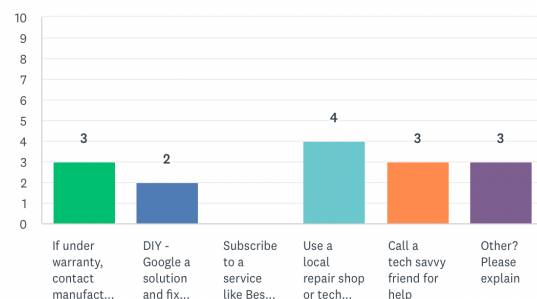
We are certainly not trying to stoke fear by stating this in such stark terms. We are meaning to state that the possession chain of hardware, its usage and training on it, plus how it is maintained over time is a critical piece to the center being able to avoid issues in the future.

The answers given in our survey of what is done when there are issues are, in fact, incredibly normal for many small businesses. Putting expense towards maintenance and upkeep of technology hardware is not a top-of-mind concert given the day to day issues of running a business. It is often close to last on the mind of those whose focus in their business is first and foremost client-focused.

In the blog post by AIS-NOW, an Information Technology services firm, (<https://www.ais-now.com/blog/top-10-most-common-it-problems-for-businesses-with-easy-solutions>) three items related to hardware and its usage stand out.

How do you currently address issues with the center's computers, software or devices? * Check all that apply

Answered: 10 Skipped: 0



Number 6 is “Unplugged: Which Cable Goes Where?” As the point makes, it may seem trivial to state, but for those who don’t live in the tech world it is the small things that can be some of the largest daily annoyances.

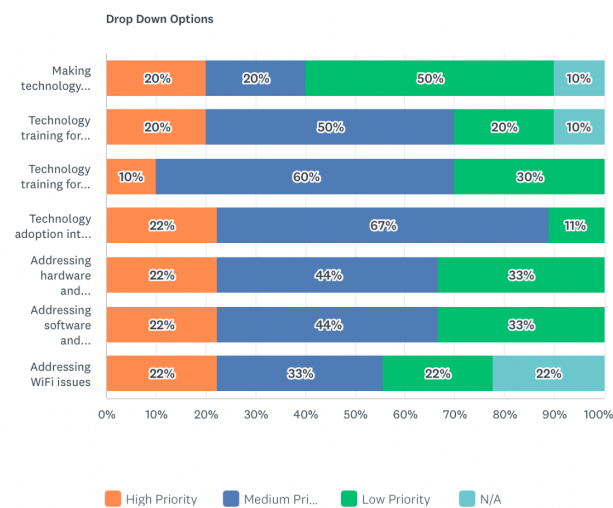
Number 8 is “Hardware or Software Issues”. The post states “It’s no secret that it’s not a matter of “if” it will break, but “when” and that many small businesses forget that “all technology devices have a lifespan.”

Number 10 is “Lacking an IT Plan” and states the importance of having a plan to deal with IT needs, both hardware and software, to ensure being ready for when issues do arise that the staff understand how to handle effectively and easily. Center staff should not be expected to be hardware technology experts, but rather be equipped with access to experts when the need arises.

Below is an additional question from the survey which highlights the issue of understanding what to do when hardware does not work and a direct correlation to a lack of support on how to handle issues when they happen.

What are your current technology challenges? Using the drop down menu, indicate whether the following challenges are a high, medium, low priority, not applicable.

Answered: 10 Skipped: 0



	HIGH PRIORITY	MEDIUM PRIORITY	LOW PRIORITY	N/A	TOTAL
Making technology purchase decisions (hardware & software)	20% 2	20% 2	50% 5	10% 1	10
Technology training for myself	20% 2	50% 5	20% 2	10% 1	10
Technology training for the staff	10% 1	60% 6	30% 3	0% 0	10
Technology adoption into daily activities	22% 2	67% 6	11% 1	0% 0	9
Addressing hardware and device issues	22% 2	44% 4	33% 3	0% 0	9
Addressing software and app issues	22% 2	44% 4	33% 3	0% 0	9
Addressing WiFi issues	22% 2	33% 3	22% 2	22% 2	9

To support and protect the Centers it is critical for the Alliance to shore up this gap in knowledge and IT planning around hardware, its distribution, usage, maintenance, and eventual replacement.

Key Takeaway Three - Internet and Wifi Connectivity

Applications like Brightwheel and the hardware to use it on are far less useful if they cannot be accessed within the daily workflow of the employees who need it. Wifi has, over the last number of years, meant freedom for employees being at a desk. It has meant being able to walk around and use applications with tablets rather than sitting at a desk with a computer. The pace at which we have adapted this access to connectivity to our day to day work has seen enormous changes in how businesses interact with their employees and clients.

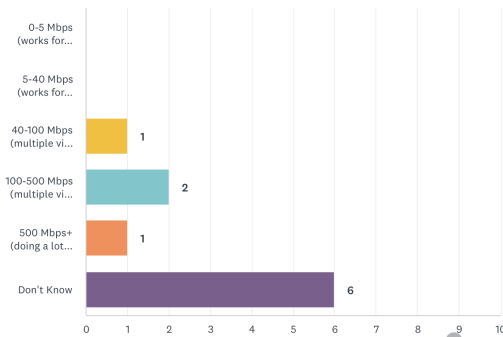
In a business like the Centers where employees are constantly on the go and not tied to a desk-centric office model, wifi connectivity, or issues with it, have an outsized impact on their ability to do their work.

Whether the Center has Brightwheel or not there is access to high-speed internet from multiple providers across the entirety of the Austin metropolitan area. Most Centers do not know what bandwidth they have, believe it to be too low for their need, or do not have consistent and reliable access to it through their facilities.

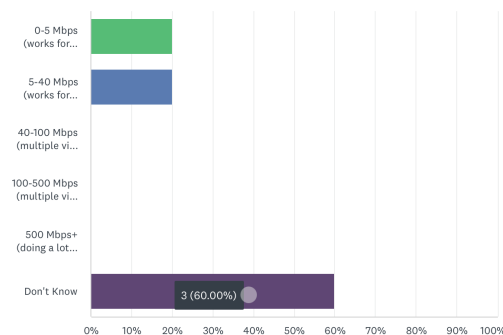
Providing a guide to internet providers and access to a service which can diagnose and solve center wifi access issues is a very important part to reaching the Alliance goals for the Centers usage of the technology provided.

Do you know what speed your internet connection is?* You can test your internet speed at [speedtest.net](https://www.speedtest.net)

Answered: 10 Skipped: 0

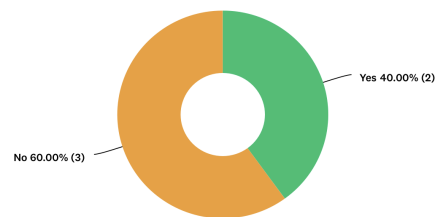


Answered: 5 Skipped: 0



Do you have consistent and reliable high speed Internet/WiFi connectivity throughout your facility?* A generally accepted rule of thumb is that anything above 100 Mbps is considered high speed internet because it can connect multiple devices at once.

Answered: 5 Skipped: 0



Our internet connection is often fails.

4/18/2023 05:04 PM

wifi does reach all the rooms and connection drops frequently.

4/18/2023 02:48 PM

wifi sometimes stops working in the portable buildings.

4/18/2023 02:30 PM

Wi-Fi is finicky and my husband donates his time to fix it, our website, and any other tech needs we have.

4/12/2023 10:11 AM

Most of the time

4/11/2023 03:56 PM

Key Takeaway Four - Training Needs and Options

In the survey questions designed to assess the Centers areas of training needs we asked “comfort and ability level” so as to gauge how they feel about their use of technology as much as how they think they are using the tools provided. The idea to tie how they feel about using technology to the idea of training on or for something they had not considered ever spending time to be training upon.

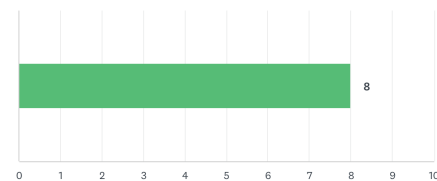
The question posed was two-fold: one to the director specifically and the other asking the center director about their staff. The question was “How would you describe your comfort level and ability to use the following technology, devices and software solutions to manage and run your business?*If you do not use the hardware or software listed, select N/A from the drop down list”.

It’s clear in the survey responses there is a clear comfort level with the items that are the most common in our daily lives and workplaces: computer/laptops, tablets, smartphones, printers/fax machines. The familiarity drops precipitously past that into the standard office productivity applications, financial accounting solution, or website content management systems.

For the Brightwheel childcare management software users a large majority answered “Moderately Comfortable/Could Use More Training” and, in a separate question, rated the training they did receive from Brightwheel as an 8 out of 10 in satisfaction.

If you have used the BrightWheel's online Help Center or Training Resources, how satisfied were you with the training or help information you received?*You may skip this question if it does not apply

Answered: 4 Skipped: 6



It is our experience that there is a direct correlation between effective user training and user adoption of an application.

This can be seen here as the survey results showed the Brightwheel users who utilized the trainings available were satisfied with it, were moderately comfortable with the software, and the utilization of the software has translated to a positive impact on their center operations and client relationships. This same throughline is possible with additional training around the other software application areas of need.

See the charts below for the details from each survey question for the center director and staff:

Staff's Comfort & Ability Level				
	UNCOMFORTABLE/NEED TRAINING	MODERATELY COMFORTABLE/COULD USE MORE TRAINING	VERY COMFORTABLE	N/A
Computer/Laptop	30% 3	40% 4	20% 2	10% 1
Tablet/Smart Phone	0% 0	50% 5	50% 5	0% 0
Printer/Fax Machine	22% 2	44% 4	22% 2	11% 1
Website Content Management System you use for your Website	30% 3	10% 1	10% 1	50% 5
Child Care Management Software - Brightwheel	20% 2	70% 7	10% 1	0% 0
Microsoft Office - Word, Excel, Powerpoint	60% 6	30% 3	0% 0	10% 1
Apple Office Apps - Pages, Numbers, Keynote	40% 4	20% 2	0% 0	40% 4
Google - Docs, Sheets, Slides	60% 6	20% 2	0% 0	20% 2
Financial Software - Quickbooks, Sage, FreshBooks	50% 5	10% 1	10% 1	30% 3
Comments (0)				

Your Comfort & Ability Level				
	UNCOMFORTABLE/NEED TRAINING	MODERATELY COMFORTABLE/COULD USE MORE TRAINING	VERY COMFORTABLE	N/A
Computer/Laptop	0% 0	40% 4	60% 6	0% 0
Tablet/Smart Phone	0% 0	33% 3	67% 6	0% 0
Printer/Fax Machine	0% 0	30% 3	60% 6	10% 1
Website Content Management System you use for your business website	40% 4	20% 2	20% 2	20% 2
Child Care Management Software - Brightwheel	10% 1	70% 7	20% 2	0% 0
Microsoft Office - Word, Excel, Powerpoint	20% 2	50% 5	30% 3	0% 0
Apple Office Apps - Pages, Numbers, Keynote	40% 4	20% 2	20% 2	20% 2
Google - Docs, Sheets, Slides	20% 2	30% 3	50% 5	0% 0
Financial Software - Quickbooks, Sage, FreshBooks	60% 6	20% 2	10% 1	10% 1
Comments (2)				
Security management portal				
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Recommendations

Each key takeaway in this report builds on the other. Brightwheel childcare management software success and the resulting positive impact depends upon the ability of the center to utilize, maintain, and eventually replace the hardware provided. Utilizing the hardware and applications provided requires internet connectivity that is fast and reliable. All of that is for naught without proper training and procedures to guide the staff at the Centers in this area which is most certainly, and thankfully, not their core competency.

Based upon the learnings from the Member Center Survey Seeds for Change Consulting offers the following recommendations:

1. Expand the use of and training in the Brightwheel solution
2. Sign on with a office technical services team for wifi connectivity and hardware support, maintenance, and replacement cycles
3. Enlist training resources across the entirety of technology usage (hardware, software, and applications) for center directors and their staff
4. Establish a core process of best practices for onboarding and center engagement to closely tie the Alliance resources to the Centers needs

Measuring Success. Moving Forward.

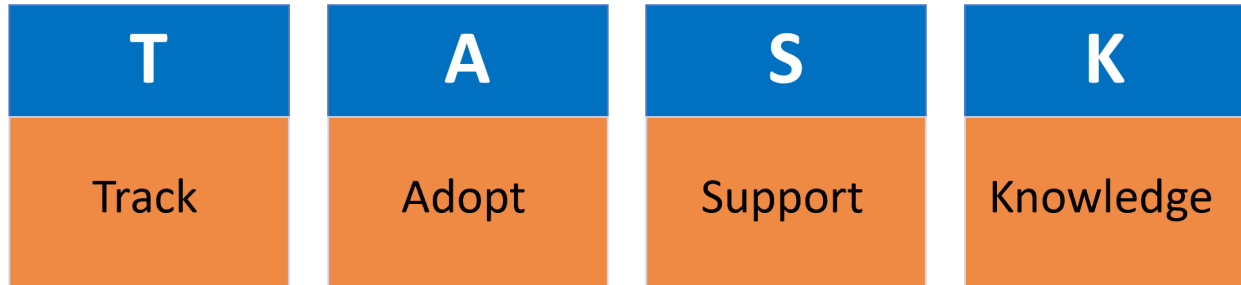
For the purposes here we define measuring success not as measuring overall program success, but rather the measuring success of technology to further program adoption.

The information technology world has created a discipline for this type of process and measurement. It is known as ITSM, Information Technology Service Management, and it is defined (<https://www.techtarget.com/searchitoperations/definition/ITSM>) as “a general term that describes a strategic approach to design, deliver, manage and improve the way businesses use IT. ITSM includes all the discrete activities and processes that support a service throughout its lifecycle, from service and change management, to problem, incident, asset and knowledge management.” The disciplines included in the ITSM framework include asset management, incident management, change management, and other categories in 31 additional areas.

The recommendations here are not intended to have the Alliance implement the full measure of ITSM. However, there are small, achievable proven pieces of it that can have an outsized impact on the ability of the Alliance staff to scale the program. Our consultants have taken the elements of ITSM most applicable for the Alliance and their Centers and distilled it into the following.

TASK

To facilitate the measuring of success for technology within the Alliance Centers remember TASK:



These four points support best practices to enable the desired goals for this UWSS program. They provide a framework for onboarding and ongoing measurement and communication between UW employees and the Centers.



Track is knowing what is important to manage, where gaps in management can cost time and money, and how to manage so as to not create a burden on any party involved.

The items involved to be tracked include hardware items, software inventory, training levels, support requests, and plenty more. As the program scales from the current numbers involved to more than double of Centers involved, as expected, the ability to have the processes and mechanisms to track all of the elements necessary will become more vital and will insure the staff involved do not have extra work to manage the program.

What are the elements to track?

Hardware

Centralized inventory tracking of the hardware provided to the Centers is important to be able to monitor issues with an individual item over time. As hardware ages it can become unavailable for security updates, be more prone to viruses or breakage. Following the age of an item means the Alliance can determine replacement needs, understand usage patterns by center, and so forth.

There are free resources available to create barcodes that can be easily printed and attached to a device. An inventory template will track the center who has the device, the device type, date placed into service, any repairs done and on what date, plus other important data. There are also software options available to license which allow for more detailed tracking than a spreadsheet and are detailed further below.

Software

The software licenses provided by the Alliance and the usage thereof have, earlier in this document, been shown to increase productivity at the Centers. Ongoing tracking of the Brightwheel use by center needs to be kept up to date by module and module element usage. Knowing which Centers are using which portions of the software can help the Alliance staff to better coach each center to achieve their maximum effectiveness with the tools provided.

Other items each center typically uses need also be tracked. These include, but are not limited to the items asked about in our survey; productivity tools, accounting software, payments services, and others. Knowing what other software the Centers use and being able to standardize across the Centers now will support the Alliance staff and make their jobs easier as the number of Centers in the program grows.

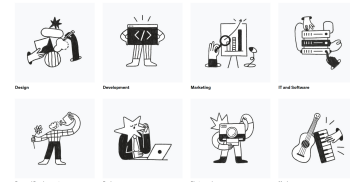
Training

It can be easy to think of items to be tracked in the technology space as only hardware and software. As mentioned above, it is important to remember that it is all three parts of People, Process, and Technology. Center staff that have completed Brightwheel training levels correlate positively to the overall usage of the software which, as shown earlier, supports comfort level and productivity with the software. We recommend maintaining a tracking sheet for each center, their employees, the training sessions taken, and make completion of a certain set of the Brightwheel classes mandatory upon joining the Alliance.

Additionally, baseline computer literacy training is important, especially for the Center Directors. As part of the onboarding of a center to the Alliance program, the Center Director and staff should be evaluated for office productivity application proficiencies as well as, for specific job roles, other application types such as financial systems. We recommend standardizing a set of classes per productivity application area and tracking the employees usage of such resource.

There are free classes online for computer literacy and also inexpensive vendors, like Udemy ([Udemy Nonprofit Plan](#)) with numerous classes.

The ability to properly track the training of staff members and correlate that to a positive impact on center operations will, over time, help other Centers to see training not as an annoying use of their time outside of their core work, but rather a productive means to be better in their work and more supportive of their clients.



Internet

In the survey it's shown that many of the Centers do not know what their internet speed is from their provider and have issues with wifi connectivity in their Centers. Knowing which Centers use which internet provider, which Centers have had a specialist check out their center for wifi connectivity issues, the dates of those visits, and noting changes of each over time will allow the Alliance to have a best practice for internet connectivity wellness checkups.

IT Support

As the survey results showed, the Centers use a fragmented array of support services to help with information technology issues. Ranging from a relative who's good with computers to a service or a warranty. It's key for the Alliance to maintain control over the hardware and software resources which are provided to the Centers. By doing so you apply a uniformity of best practices that keep the staff trained and the hardware functional. Below we will mention services to support this aspect, but on the high level it is key to track how and when the Centers need support and for what. By understanding that it becomes possible to anticipate future issues and possibly avoid or plan for them.

Adopt

Adopt is the understanding of how the elements being tracked are being adopted by the Centers and their clients. What is the process of adoption for the items which need tracking? Once adopted, what are the questions that need to be answered out of tracking an item? Adoption is more than a “did someone adopt or not”, but “did they and why were they successful?” Were they successful in a manner consistent with the mission goals?

In Andrew Urban's 2010 book “The Nonprofit Buyer” he coined the term ‘Return on Mission’. It is a mission-focused version of ROI (return on investment). The goal being that a return on an “investment” should be wrapped within the ways that it matches to and enables organizational mission goals. For our purposes we need to look at the adoption, and the success of adoption, in terms of mission goals as well as cost/time savings plus other business objectives. The diagram in Key Takeaway One showing the correlation between adoption and business/mission impact is a proof point of this theme.

The goal with adoption is to understand how the technologies and training match to the program goals success.

The vision of the Shared Services Alliance are listed for the Centers as:

- Increase your revenue
- Streamline your operations
- Grow your business

The mission goal, however, is the “goal of increasing the supply of high-quality, affordable child care within our community” and “is committed to ensuring all children enter Kindergarten happy, healthy, and prepared to succeed in school and beyond”

One is a set of business goals while the other is a mission goal. Mapping the business goal to the mission goal is the key to adoption success for the program and for the funders of the United Way Shared Services Alliance for Early Learning.

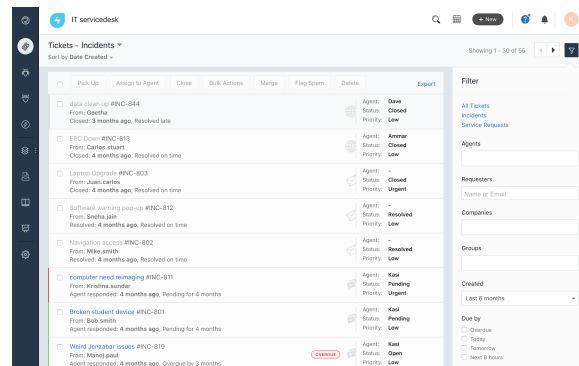
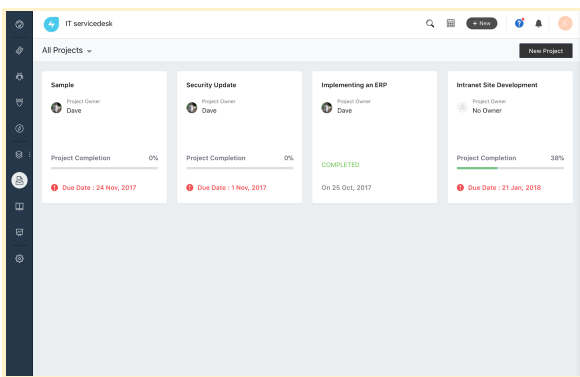
Support - Provide the means for technical support on call for the items mentioned in the “Track” section.

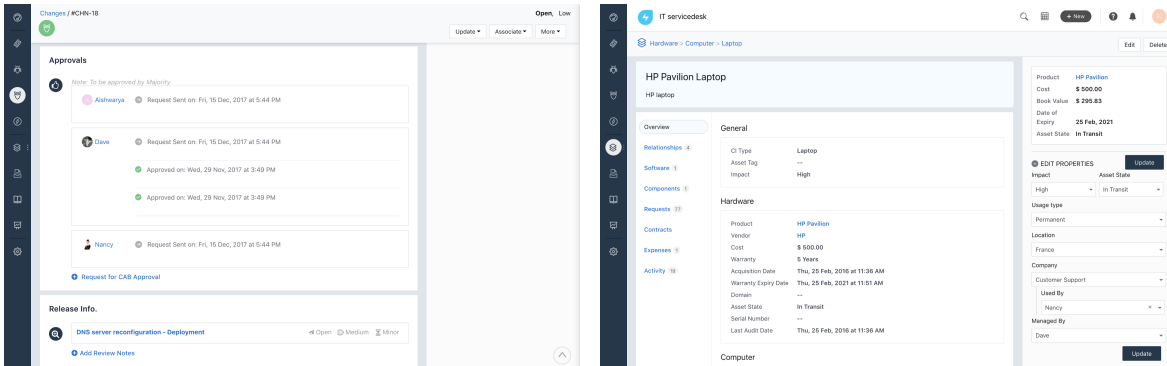
Two of the items in the ITSM framework that most have used in one way or another, whether they realize it or not, are the help desk and the self help sections. The help desk could be personalized support by chat, email, phone call, etc. The self help sections are online forums, FAQs, self-paced training resources, and the like. The goal with these is to centralize how someone reaches out for help and give options for any issue resolution.

As the number of Centers grows it is going to get harder and harder to provide support in the current manner. A centralized system will be of critical importance to track requests, route answers, and, most importantly, not lose sight of questions asked (often happens when emails pile up).

Typical questions from the Centers would include requests for software, help with hardware issues, website questions, wifi connectivity problems, etc. Alliance staff need to be able to do issue tracking that states when an issue was asked and how long till it is resolved and provide a self-service means to answer frequently asked questions for self-service. These are elements that are difficult to do without a specific software set that is designed for such tasks.

One example that could allow for the Alliance to manage these type of service requests themselves is from a company called Freshworks (www.freshworks.com/freshservice). As an example, it does have items in the software that aren't of need to the Alliance today, but the core elements creating a help desk and self-service forum are there and start at \$29/mo per agent. We mention this as one of many options that are out there and to be able to have something tangible with regard to screen shots to explain how the narrative looks within software.





Apart from issue tracking or self-service options, there are still needs for technical support (online, onsite and phone support options). Contract situations from vendors, located locally or with a national presence are available.. One option is Best Buy via their Geek Squad. This division provides custom project and general office support options for wifi connectivity along with technical phone support and hardware discount options. The Alliance could use a service like this to allow for the Centers to contact directly or for Alliance staff to connect on behalf of the Centers.

<https://www.bestbuy.com/site/electronics/bestbuy-business/pcmcat230900050001.c?id=pcmcat230900050001>



Knowledge - Onboarding and ongoing best practices knowledge base

In the 'People, Process, and Technology' knowledge may seem to be a 'people' question, but much of it is actually the 'process' part of the trio. The Alliance, after lining up what needs to be tracked, understanding what is adopted, i.e. a current technology baseline, and what should be adopted and how, setting up proper support channels, must then formalize the best practices of each into a process that helps current Centers maximize effectiveness and new Centers onboard quickly and easily.

An onboarding checklist for Brightwheel (training and client success contacts), hardware items (laptops, ipads, etc with barcodes on them for tracking), training resources for productivity applications, a buddy system perhaps to another more established center where they can get support and advice. All of these are parts of a success checklist that are best practices built out of the experiences of the Alliance and the first 20 Centers. The checklist should include milestone check in calls with Alliance staff to monitor adoption and ensure resources are being utilized.

Encoding best practices into an onboarding and continued support system process is how knowledge becomes a standard.

Timeline

It is our opinion the items discussed in this report can be accomplished in the next year. The decisions to be made are around what level of solutions and services to add based on the Alliance's budget and growth projections. Does the Alliance want to start small and move up from there? What additional software needs to be purchased, technical support contracts, etc. Each of the recommendations mentioned can be done with free resources using more staff time or paid resources with less staff time.

Whichever path is the starting point the key is to start and build. The results of the center surveys point to the fact that the work will be worth the effort in impact.

Conclusion

In conclusion, this work resulted in these four key takeaways:

- Brightwheel usage has positively impacted the Centers ability to their work
- Feel competent in hardware usage, but not when something needs fixing
- Have access to high speed internet, but issues with it in the Centers
- Training on hardware and software is needed to understand options available

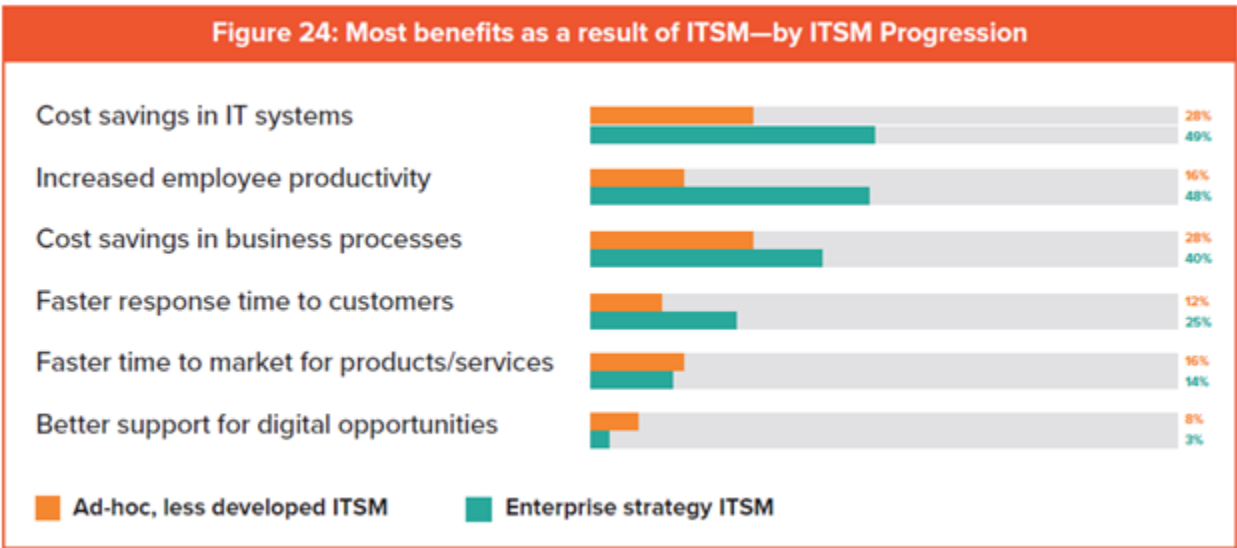
These key takeaways can be solved through the implementation of several information technology disciplines that are encompassed within the acronym TASK: Track, Adopt, Support, Knowledge.

These four steps outline “what” must be tracked, the “how” to adopt technology in the best way possible, the “what” should be done when things break, and the “who” must work together for best practice success. Lastly, the by “when” all of these items can be accomplished.

What will this mean for the Alliance and the Centers?

Improved Effectiveness

Tracking key performance indicators (KPIs) via an onboarding checklist rooted in both business and mission goals will help the Alliance staff and the Centers to know where they stand and how they can get better in their work. The chart below from ITSM vendor BMC outlines the improvements in efficiency, costs and productivity that adopting IT service management support, like those recommended in this report, can have on a business.



Time Savings

The best example of a time-saving is knowledge management, whose entire goal is to reduce or eliminate the need for the business to rediscover information it has already learned. Self-service and ticket tracking of issues falls under this category. Many organizations that implement these systems save hours per year of frustration and wasted time which, in a small business, is invaluable.

An Alliance staff-created portal could create an extreme amount of time savings to streamline information sharing and help each center from spending less time re-discovering information and hunting down answers to known issues. This portal could include, among many other items:

- The Onboarding Checklist with progress reports
- Links and contact info to the outsourced IT help, such as Geek Squad
- Links to best practices resources (internal and external)
- United Way Alliance graphics for their website and marketing materials

Money Savings

The ability to drive cost savings through shared purchasing agreements, management of assets to avoid loss, damage, and misuse can save thousands of dollars per year per center. Instilling best practices into the processes for onboarding and ongoing communications helps catch problems early when they are less expensive to handle.

Enable Effective Planning

Without a structured approach to IT service management, organizations are more likely to make poor strategic decisions that lead to avoidable waste. Prescribing a standardized set of solutions, training for the staff, and IT support capabilities makes planning annual costs per center much easier of an exercise.

Improve Accountability

The creation of accountability through the standardization of services is a defining feature of this type of IT service management. It helps organizations improve policies and procedures for delivering services, standardize the service delivery of them, and formally documents the processes that are known to make the best impact for the Centers' business goals and the Alliance's mission goals.

Appendix One Complete Survey Answers

See attachment to this document the complete survey results in both PDF and CSV format.

Appendix Two

Best Buy Geek Squad Example Office Support

See attachment to this document for a PDF of plan offerings with costs and discounts.

Appendix Two Hardware Inventory Spreadsheet

See attachment to this document for an Excel spreadsheet for current and needed hardware of the centers who answered the survey.