

**Business Training
Annual Report
July 1, 2021 - June 30, 2022**



**United Way of
Massachusetts Bay
and Merrimack Valley**



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I. Introduction

Neighborhood Villages Business Training professional learning model, created in partnership with the Department of Early Education and Care and United Way, began in the summer of 2021. The project began as a small pilot for FCC educators only in the summer of 2021 when NV partnered with leadership at the Massachusetts Department of Early Education and Care (EEC) and United Way. The initial outreach effort was a single email blast, using the EEC provider list, to all FCC providers across the state. There were 348 registrations from that single email blast for only 60 spaces in the training.

In the fall of 2021, NV and EEC expanded the training to include both FCC providers as well as GSA administrators. To date, we have served a total of **466 educators** from across the state. In total, Neighborhood Villages (NV) has run 22 Family Child Care (FCC) cohorts serving **303 FCC educators** and 12 Group and School Age (GSA) cohorts serving **163 GSA program administrators**. Since its conception, NV and UW have implemented and refined the FCC business training model across four sections (Summer 2021, Fall 2021, Winter 2022 and Spring 2022). In the Fall of 2021, NV expanded the business training model for GSA providers and has implemented it across three sections (Fall 2021, Winter 2022, and Spring 2022).

The data-informed business training models are designed to produce outcomes that increase provider knowledge of business expertise and support changes related to optimal business practices in key priority areas. Specifically, the NV models emphasize priority areas related to business planning, fiscal management, budgeting, and accounting; human resources such as compensation, benefits and issues related to equity and diversity; marketing and outreach, and the use of technology (specific objectives are provided below).

Recognizing the unique needs of FCC providers and GSA programs, the NV models incorporate two distinct curricula, coaching/support protocols and resource suites to effectively and efficiently address business management priority areas across the diverse business structures that distinguish these forms of care. The curriculum unfolds in a series of 6-7 progressive sessions, beginning with mission statements and the foundational elements of a business plan to the development of a complete business plan and full budget. A hands-on approach to learning is stressed and by the end of the course modules, programs have a new or refined business plan and budget. All sessions include active facilitation by an expert instructor and robust interactions between facilitators and participants, as well as, among the participants themselves. Facilitators are available to students after and in between sessions to answer questions and support hands-on learning activities. In addition to the facilitated learning sessions, a range of resources are available to participants, including blank templates for budgeting, business planning and tracking cash flow. These resources bolster participant

learning and support embedded learning activities to drive the implementation of course business strategies and subsequently practice change and program capacity building.

A. Overall Participants Served by Section and Cohort

To date since June 2021, NV has reached 466 providers. In FY22, the Business Training program served a **total of 411 FCC providers and GSA administrators**. Below is a breakdown of the providers reached in FY22.

Table 1. Participant completion by cohort and provider type

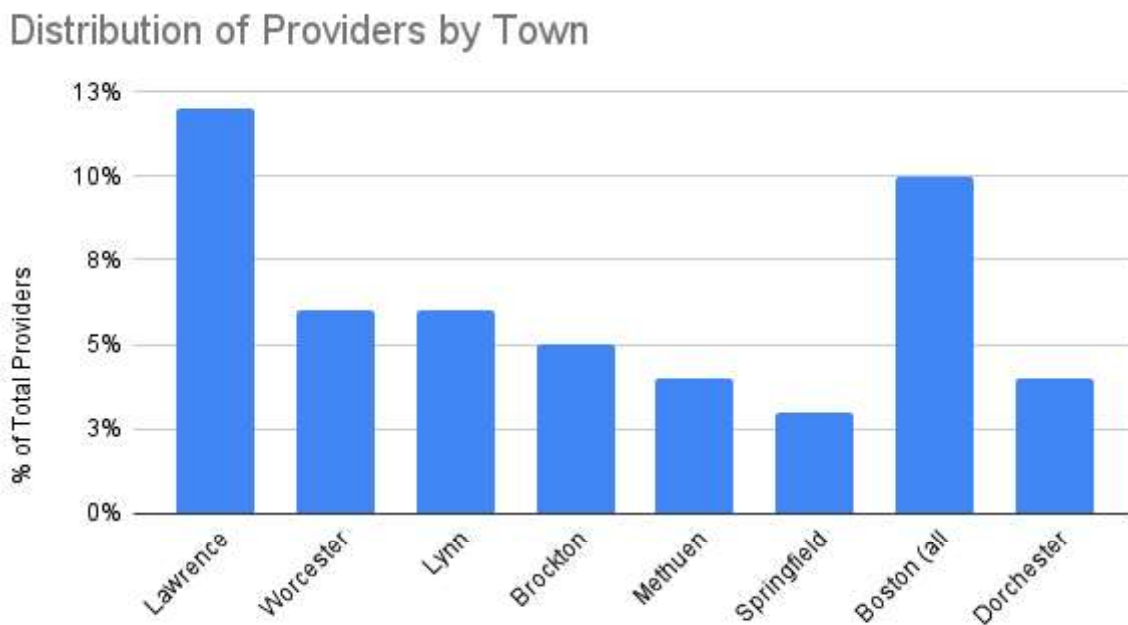
	Fall 2021	Winter 2022	Spring 2022
FCC English	41	38	37
FCC Spanish	41	45	46
GSA English	51	56	39
GSA Spanish	N/A	N/A	17

II. Family Child Care Business Training Model

Who took the Family Child Care Business Training?

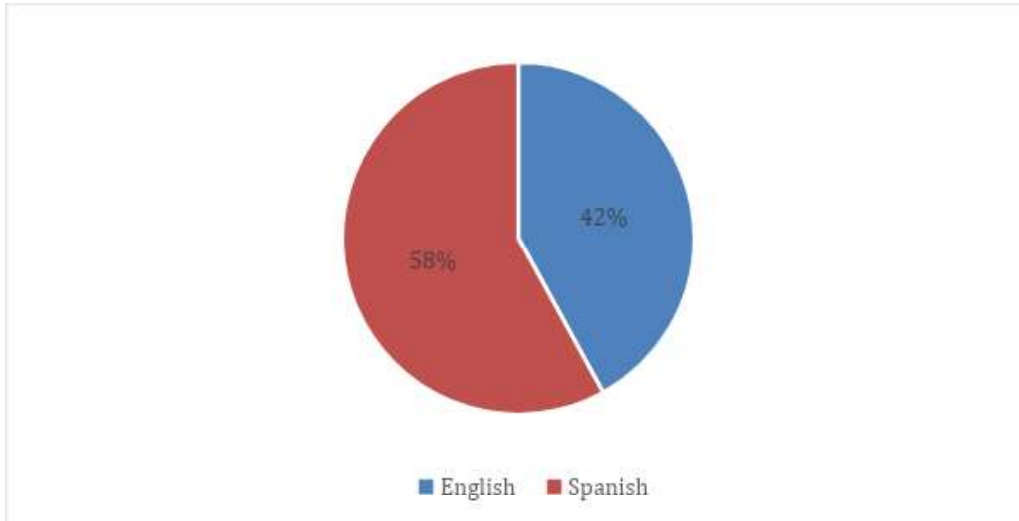
FCC providers represented 75 different towns in Massachusetts. Of these towns, most only had one to two providers who resided in these areas. The town with the greatest number of providers enrolled in the training was Lawrence with 12% of the participants and Boston with 10% of the participants. The participants from Lawrence represented recruitment from an FCC system provider in the Spring FCC cohort. Of those providers from Boston, six different Neighborhoods were represented with the largest portion from Dorchester, with Dorchester-based participants representing over 4% of the overall population.

Figure 1. Distribution of providers by town



For the FCC providers, a majority were Spanish speaking and subsequently requested taking the course in Spanish with both a Spanish facilitator and coach.

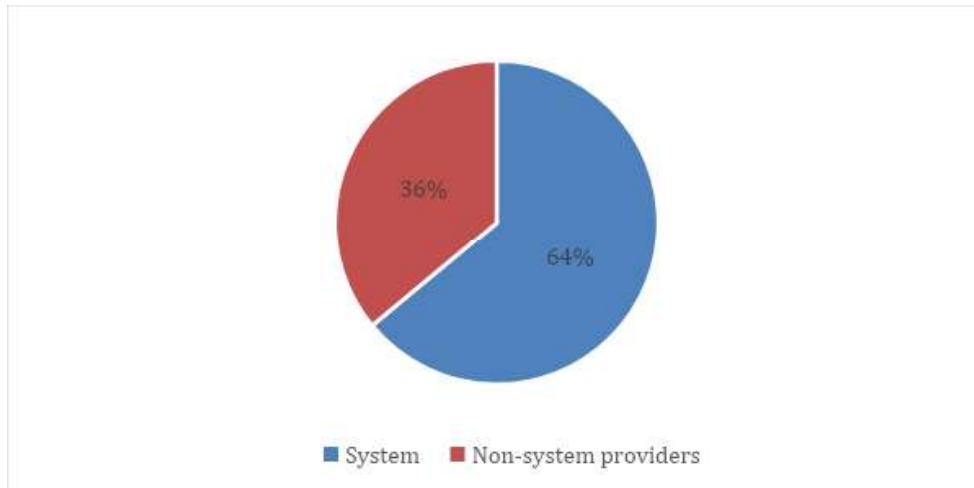
Figure 2. Percent of providers speaking Spanish as a primary language



Most of the FCC participants also reported belonging to a system. Of those providers that belonged to systems, providers most commonly reported receiving support from their systems in terms of:

- Providing a parent handbook
- Supporting enrollment
- Tracking vouchers
- Offering transportation to children to and from the program

Figure 3. Percent of providers that were part of an FCC system



How were participants recruited?

Participants were recruited for the training through a variety of outreach methods. The main and most effective method was sending email blasts to FCC providers using EECs list of licensed FCC programs. In FY22, cohorts were recruited through the waitlist that was generated from the FY21 summer section, subsequent email blasts as well as posts on social media and word-of-mouth.

Data from the Summer, Fall and Winter cohorts indicated that the vast majority of providers heard about the course through the email blasts.

For the cohort in the spring of 2022, the NV team worked with MA EEC leaders to conduct intentional recruitment with some Family Child Care systems to pilot the idea of building cohorts of providers from the same system and including system support staff in the model. This strategy is designed to both extend the reach of the training as well as to build the capacity of systems to support provider's business skills and knowledge beyond the course. We are still in the process of evaluating the data from those providers and gathering additional information from systems administrators as to how to increase system participation in future cohorts and build system capacity to support providers in this key area.

What does the training include?

The entire training suite includes technology support, six 2-hour modules, one-on-one coaching and an array of optional training and technical assistance workshops.

Every FCC participant receives a \$300 gift card to Best Buy to support their technology needs. The gift cards are distributed electronically after the 1st class session along with a pamphlet of

suggested purchases, including recommended items and brands. The BT Coordinator also provides Technical Assistance to participants who need help accessing the electronic gift card.

Specifically, the FCC course, developed by United Way and Shared Services, includes six 2-hour modules that are integrated with one-on-one coaching sessions provided by FCC providers who are uniquely trained to support this business curriculum. (See next session for coaching details). Each of the modules has specific learning objectives and are intentionally sequenced (see XX)

Table 2. FCC Curriculum Objectives by Session

Session	FCC Curriculum Objectives
1	<ul style="list-style-type: none"> *Seeing yourself as a business leader and entrepreneur *Present yourself as a professional *Turn your business features into business benefits *Differentiate your program from other programs
2	<ul style="list-style-type: none"> *Understand the importance of full/maximum enrollment *Develop ideas on how to reach full/maximum enrollment *Understand the importance of collecting tuition on time and in full *Strategies for collection tuition on time and in full *Understand the importance of your programs revenues covering your costs *Learn how to calculate if your programs' revenues are covering its costs.
3	<ul style="list-style-type: none"> *Basics of record keeping and best practices *The importance of calculating our programs time/space percentage *How to calculate your programs' time/space percentage
4	<ul style="list-style-type: none"> *Understand the importance of budgeting *How to create a budget *How to use the time/space percentage in your budget *How automation and using technology can help save time *Strategies for using automation and technology in my program
5	<ul style="list-style-type: none"> *Understand the purpose of a business plan *Learn the basic parts of a business plan *Complete a draft business plan/outline for my program
6	<ul style="list-style-type: none"> *Understand the importance of knowing your programs cash position *Calculating program's cash position *How develop and complete a cash flow worksheet for my program *Understand business best practices before a crisis strikes *Understand the importance of marketing *Learn marketing how-tos

The curriculum model offers providers an extensive array of resources which are provided to participants and available on the Shared Services website. The down-loadable resources parallel the ones applied during course sessions to facilitate use and support learning. It should be noted that blank templates and spreadsheets have embedded formulas to bolster consumption and practice change.

Many of the resources for FCC are based on the work of Thomas Copeland who is a leading expert on business planning for FCC providers. These include:

- Planning worksheets
- Blank business plan templates
- Blank budget forms with prepopulated formulas embedded
- Break-even calculators to understand fixed and variable costs
- Cash flow projection worksheets
- HR strategies and guidance
- Templates for staff and parent handbooks and policies

Coaching Implementation

The original pilot program in the summer of 2021 did not include individualized coaching as an embedded or required part of the program, but was an additional and optional choice for providers if they chose to pursue it. Based on the data from participants and instructors, NV and UW integrated coaching sessions into the training model and have continued to include it through all subsequent cohorts. Coaching sessions are individualized and done one-on-one between a provider and a coach. To accommodate coaching, session implementation and coaching periods alternate every two weeks. This gives participants time to focus on session activities and subsequent coaching activities without having to simultaneously juggle the competing priorities of the course and coaching. Two of the coaching sessions are semi-structured to address specific priority areas covered in prior course sessions; and the final coaching session is an open session designed to address priority areas of providers’ choice. By the end of the course and the completion of the coaching sessions, the course is designed to support participants in the creation of a fully formed business plan and budget to serve as the foundation of their programs’ fiscal and business management.

Table 3. Outline of Integrated Coaching Model

Sessions/Coaching	Objectives
Sessions 1 & 2 (week 1 & 2 of model implementation)	*Building blocks to business planning *Supporting enrollment *Understanding Revenue *Identifying Costs
Individualized Coaching Session (week 3 & 4 of model implementation)	*Building blocks to business planning *Supporting enrollment *Understanding Revenue *Identifying Costs

Sessions 3 & 4 (week 5 & 6 of model implementation)	*Record keeping *Calculating time/space percentage *Developing a budget
Individualized Coaching Session (week 7 & 8 of implementation)	*Record keeping *Calculating time/space percentage *Developing a budget
Sessions 5 & 6 (week 9 & 10 of implementation)	*Understanding Business Planning *Calculating and tracking Cash Flow *Marketing Strategies *Developing a full business plan
Individualize Coaching Session (week of 11 & 12 of implementation)	*Business Planning for the future *Open topic for coaching to support business planning and program development

Participants that have received the new integrated coaching model have been very positive about the coaching that they have received, as evidenced by the post data collected from the most recent Spring FCC cohort.

Table 4. Participant rating of coaching

	1 Not at all	2	3 Somewha t	4	5 Very muc h
I am satisfied with the quality of the coaching	0%	2%	8%	6%	83%
The coach was knowledgeable	0%	2%	8%	3%	86%
The coached explained things to me in a way that was clear and easy to follow	0%	0%	9%	5%	84%
The coach answered by questions	0%	0%	9%	2%	88%
I learned something from the coach that I can use in my work	0%	3%	6%	5%	84%
The amount of time that I had with the coach was adequate	2%	0%	5%	11%	83%
It was easy to schedule time with the coach	2%	2%	6%	5%	86%
It was helpful to meet with the coach between class sessions	2%	3%	6%	8%	81%
The coached helped me develop or refine the budget for my program	3%	3%	3%	9%	81%
The coached helped me with contracting and policies for my program	3%	3%	5%	16%	72%

Supplemental Training and Technical Assistance

Participants from all cohorts were invited to participate in optional evening workshops. Whereas the scope of the training modules was broad and overarching, each of the workshops took a deep dive into a specific business practice. Topics for workshops were selected based on data collected from participants regarding need for further PD and feedback from course facilitators.

Table 5. Supplemental Workshops

Workshop Title	Presenting Partner	Language	Date	#Attended
Retirement	Better Futures	English/Spanish	11/10/2021	94
FFCRA & ERCT	Civitas Strategies	English	11/17/2021	30
		Spanish	11/18/2021	40
Contracts & Policies	Goodwin Neighborhood Assoc.	English	1/31/2022	30
		Spanish	1/31/2022	41
Tax Planning	Civitas Strategies	English	2/17/2022	30
		Spanish	2/15/2022	54
Vehicle & Food Expenses	Civitas Strategies	English	3/14/2022	30
		Spanish	3/15/2022	49
Business Use of the Home	Civitas Strategies	English	3/21/2022	25
		Spanish	3/22/2022	58
How to Select a Tax Preparer	Better Futures	English	3/28/22	48
		Spanish	3/28/22	17
Business Credit Building	Better Futures	English	4/25/22	32
		Spanish	4/25/22	41
Retirement II	Better Futures	English	5/11/22	66
		Spanish	5/11/22	43

What participants are saying about the FCC Business Training?

Across the various cohorts, providers felt very positively about the business training. Data regarding FCC educators' overall experiences are presented below in Tables 6, 7, 8, 9.

Table 6. FCC Satisfaction of participants with course: Summer Cohort

	1 Not at all	2	3 Somewhat	4	5 Very much
The course helped me learn strategies for managing my program better	--	--	--	7% (n=4)	93% (n=51)
The course deepened my knowledge of business practices	--	--	--	7% (n=4)	93% (n=51)
The content of the course was relevant to my work	--	--	--	--	100% (n=55)
The course made me more confident in my business practices	--	--	--	4% (n=2)	96% (n=53)
I learned something during this course that I will use in my work	--	--	--	5% (n=3)	95% (n=52)
The resources provided during the course were relevant and useful for my work	--	--	--	2% (n=1)	98% (n=52)
The information presented was respectful, non-judgmental, and supportive of diverse populations (i.e., free from stereotype or bias)	--	--	--	4% (n=4)	96% (n=96%)
The content of the course was inclusive of diverse cultural experiences and backgrounds	--	--	--	6% (n=3)	94% (n=51)
Because of the course, my program has more effective business practices	--	--	2% (n=1)	15% (n=8)	83% (n=45)
The course instructor was knowledgeable	--	--	--	2% (n=1)	98% (n=54)
The course instructor answered my questions	--	--	--	2% (n=1)	98% (n=54)
The instructor presented course materials clearly	--	--	--	2% (n=1)	98% (n=54)
The instructor's teaching methods promoted student learning	--	--	--	--	100% (n=55)
The instructor was well prepared for class	--	--	--	--	100% (n=55)
I was satisfied with the quality of this course	2% (n=1)	--	--	--	98% (n=54)

Table 7. FCC Satisfaction of participants with course: Fall Cohort

	1 Not at all	2	3 Somewhat	4	5 Very much
The course helped me learn strategies for managing my program better	--	--	1.5%	8.1%	92.4%
The course deepened my knowledge of business practices	--	--	1.5%	7.6%	90.8%
The content of the course was relevant to my work	--	--		9.1%	90.9%
I learned something during this course that I will use in my work	--	--	--	3.1%	96.9%
The resources provided during the course were relevant and useful for my work	--	--	--	6.1%	93.9%
The information presented was respectful, non-judgmental, and supportive of diverse populations (i.e., free from stereotype or bias)	--	--	--	3.1%	96.9%
The content of the course was inclusive of diverse cultural experiences and backgrounds	--	--	--	7.6%	92.4%
Because of the course, my program has more effective business practices	--	--	3.0%	19.7%	77.3%
The course instructor was knowledgeable	--	--	1.5%	3.0%	95.5%
The course instructor answered my questions	--	--		3.0%	97.0%
The instructor presented course materials clearly	--	--	1.5%	3.0%	95.5%

The instructor's teaching methods promoted student learning	--	--	1.5%	3.0%	95.5%
The instructor was well prepared for class	--	--	1.5%	3.0%	95.5%
I was satisfied with the quality of this course	--	--	1.5%	3.0%	95.5%

Table 8. FCC Satisfaction of participants with course: Winter Cohort

	1 Not at all	2	3 Somewhat	4	5 Very much
The course helped me learn strategies for managing my program better	--	--	1.5%	8.1%	92.4%
The course deepened my knowledge of business practices	--	--	1.5%	7.6%	90.8%
The content of the course was relevant to my work	--	--		9.1%	90.9%
I learned something during this course that I will use in my work	--	--	--	3.1%	96.9%
The resources provided during the course were relevant and useful for my work	--	--	--	6.1%	93.9%
The information presented was respectful, non-judgmental, and supportive of diverse populations (i.e., free from stereotype or bias)	--	--	--	3.1%	96.9%
The content of the course was inclusive of diverse cultural experiences and backgrounds	--	--	--	7.6%	92.4%
Because of the course, my program has more	--	--	3.0%	19.7%	77.3%

effective business practices					
The course instructor was knowledgeable	--	--	1.5%	3.0%	95.5%
The course instructor answered my questions	--	--		3.0%	97.0%
The instructor presented course materials clearly	--	--	1.5%	3.0%	95.5%
The instructor's teaching methods promoted student learning	--	--	1.5%	3.0%	95.5%
The instructor was well prepared for class	--	--	1.5%	3.0%	95.5%
I was satisfied with the quality of this course	--	--	1.5%	3.0%	95.5%

Table 9. FCC Satisfaction of participants with course: Spring Cohort

	1 Not at all	2	3 Some- what	4	5 Very much
The course helped me learn strategies for managing the program better	0%	0%	3%	11%	84%
The course deepened my knowledge of business practices.	0%	0%	2%	11%	86%
The content of the course was relevant to my work.	0%	0%	2%	9%	88%
The course made me more confident in my business practices	0%	0%	3%	14%	83%
The course helped me change my business practices	0%	0%	5%	16%	77%
The course helped me develop a budget	0%	2%	5%	16%	78%
The course helped me keep track of my expenses and cash flow	0%	2%	5%	19%	75%
The course helps me use the percent of space/time formula	0%	0%	8%	14%	78%
The course helped me with develop a business plan	0%	0%	3%	23%	73%
The course helped me with my enrollment	3%	2%	16%	13%	67%
The course helped me use technology better	2%	2%	13%	11%	72%
The course helped me develop a website/Facebook page	3%	0%	20%	20%	55%
The course met my professional needs related to building my FCC business practices	0%	0%	8%	16%	75%

I learned something during this course that I use in my work	0%	0%	3%	11%	84%
The resources provided during the course were relevant and useful for my work.	0%	0%	2%	14%	84%
Because of the course, my program has better business practices	0%	0%	6%	14%	80%

Noteworthy, FCC providers reported that the classes were easy to attend and accommodated their busy schedule.

Table 10. FCC providers rating of course logistics

	1 Strongly disagree	2	3	4	5 Strongly Agree
The classes were easy to attend	--	--	1.5%	16.7%	82%
The class times worked well with my schedule	--	--	6.2%	6.2%	87.7%
Taking classes virtually was convenient for me	--	--	1.5%	6.1%	92.4%
I was able to email the instructor when I had questions or needed help	--	--	--	7.6%	92.4%

Across the cohorts, FCC providers consistently reported having made modifications to practice or plans to make modifications to practices. As an example, data from the Spring FCC cohort is presented below. Additional analysis on changes to practices including data from a follow up survey is currently being collected. These analyses will be made available in a report currently being developed by the Brazelton Touchpoints Center at the end of July.

Table 11. FCC Modifications and plans for modifications to practice: Spring Cohort

	Do not have or currently not doing	No changes made to what program was doing before taking the course	Modified / changed existing program strategies / policies based on course	Developed new strategies/policies based on course	Plan on modifying strategies/policies based on course but have not started making changes
A Program's Mission and/or vision statement	3%	2%	11%	19%	63%
Program Budget	5%	2%	11%	22%	59%

A system for tracking monthly expenses	6%	2%	9%	17%	64%
A way of tracking the amount of cash available on a monthly basis	5%	2%	13%	14%	66%
A process for setting aside money for emergency or unexpected costs	6%	2%	9%	14%	67%
A program business plan	5%	2%	11%	19%	63%
A parent handbook	0%	3%	9%	14%	72%
A way for calculating your program's time/space percentage	0%	2%	9%	16%	72%
System for collecting tuition payments/parent fees	2%	5%	14%	17%	61%
Strategies for enrollment/filling child slots	0%	5%	13%	16%	66%
Use of accounting software for your business	3%	3%	22%	11%	59%
A website or Facebook page	11%	6%	9%	14%	56%

Continuous Quality Improvement in FY22

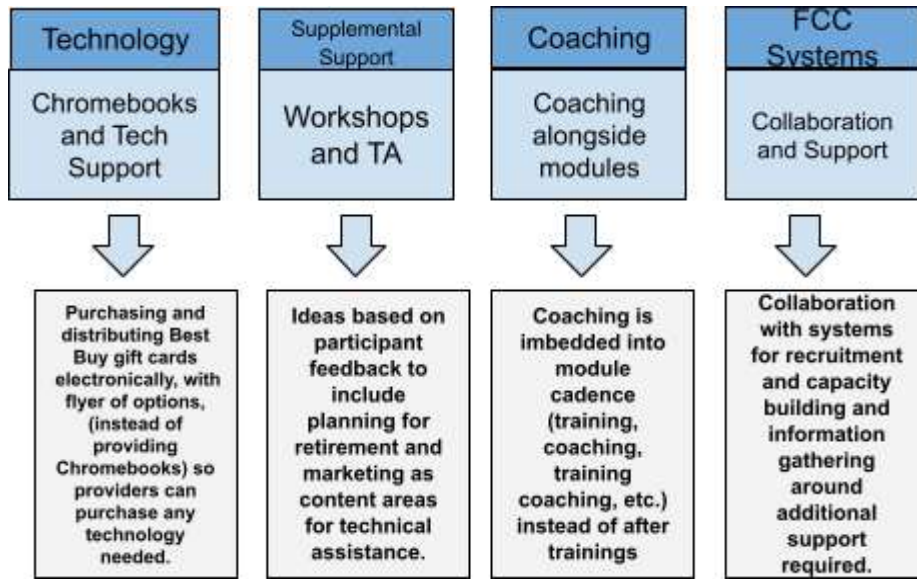
Across the past year, NV and UW have worked together to make several data-driven modifications to multiple levels, as part of a continuous quality improvement process.

Specifically, the model was adapted to include

- the use of gift cards to ensure access to technology
- supplemental workshops, and TA to better meet the needs of the field
- integrated coaching to support application of the course materials to participants programs and drive practice change
- recruiting through systems and supporting system-based coaches to improve reach of course and build system capacity.

The figure below outlines modifications to the implementation of the business course based on a continuous quality improvement process.

Figure 4. Outline of improvements made throughout FY22



Appendix A

Business Training Program Enrollment and Support Process

Step 1: Develop program cadence with partners

Beginning 2 months prior to the start date of the modules, the Business Management team works with its partners to determine the schedule and cadence of the Business Training program for FCC and GSA cohorts.

- Business Training Coordinator sets up meetings with partners
- In a collaborative process, partners and BT team decides the details and logistics for the upcoming cohort

Step 2A: Outreach and Marketing

- The first outreach emails go to participants who were waitlisted in previous sessions.
- Next, an email is sent to the EEC mailing list detailing the upcoming session and registration process
- Third, the BT team targets more specific groups such as the MA Directors Facebook page or participants from the 9:30 Call

Step 2B: Filling the Sessions

- After registering, participants are grouped by preference for day of the week and send a link to attend orientation.
- The Business Training coordinator continues to organize and fill sessions based on participants' preferences

Step 3: Orientation

- One week before orientation, participants receive a reminder email confirming their spot in the course, detailing the orientation details and program date information
- The day of the orientation, participants receive an email reminder
- During orientation, participants meet the NV BT coordinator, their instructors, and are given the opportunity to ask any clarifying questions

Step 4: Throughout the course of the program

- NV BT coordinator attends the first, third, and last course session to confirm attendance and support partners
- When BT coordinator attends the session, they distribute pre-, mid-, and post- session surveys, provide support to the instructors, and answer any questions participants may have

Step 6: Following the course modules

- After participants have completed the course, participants are invited to supplemental coaching and workshops
- Participants receive their certificates
- Participants are invited to participate in post session evaluation opportunities