



Opportunities  
Exchange

# Using Business Intelligence to make Smart Decisions

*OppEx Conference 2022*

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# Session Overview

- Introductions
- Business Intelligence Defined
- Business Intelligence in Action
  - Provider and Alliance level business data
  - Provider and Funding program level compliance data
- Q&A

# Business Intelligence

Business intelligence leverages software and services to transform data into **actionable** insights that inform an organization's business decisions.

BI tools present analytical findings in reports, summaries, dashboards, graphs, charts and maps to support:

- ✓ data-driven decisions
- ✓ streamlined operations



# ECE businesses need actionable data!

- Providers
- Networks/Shared Service Alliances
- Funding programs (Head Start, UPK, CACFP)

Should I expand? Should I invest in more marketing?  
Do I need to remain open for extended hours?

Are we adding value to *this* member? To *all of our* members? Are members profitable? Should we modify program services or service dosage?

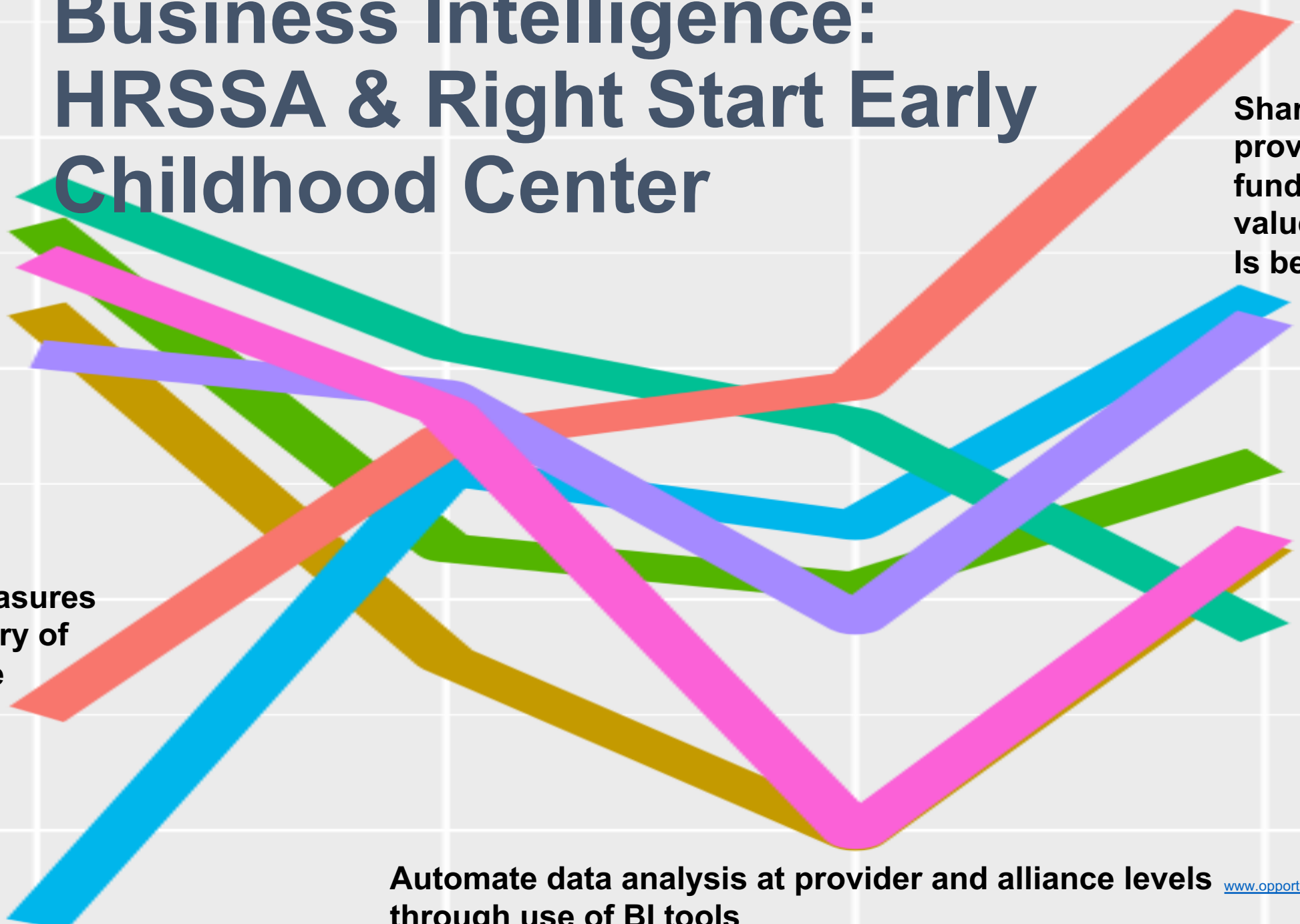
Is this child eligible for program funding? Has the provider completed the enrollment process for this child? Are all teachers qualified for their positions?

# Business Intelligence: HRSSA & Right Start Early Childhood Center

Share BI with providers and funders – confirm value proposition is being realized

Tie measures to theory of change

Automate data analysis at provider and alliance levels through use of BI tools





## Early Education Business Program

- PD
- Mentoring
- Business Counseling
- Business Supports

Costs covered by public and private funding sources

Open to all types of programs

TRANSFORM YOUR BUSINESS WITH THE AWARD-WINNING

# Early Education BUSINESS Program

Grant Funded — No Cost To You!  
You'll Learn:

### Strategic Planning

Understand how to successfully achieve your business goals, or build a strategy to achieve them.



### HR Management

Build successful human resource systems that bring out the best in your employees and reduce turnover.



### Financial Management

Learn how to increase your center's profits:



✓  
Sharpen your financial know-how

✓  
Strengthen your money management systems

✓  
Become savvy at financial forecasting

✓  
Make data-driven decisions

### Marketing

Reach full capacity!  
Understand best practices in early childhood marketing.



### Using Technology

• Save time  
• Reduce stress  
• Automate and streamline  
Learn how tech gives you more time to lead!



PLUS OPPORTUNITIES TO NETWORK, COLLABORATE & SHARE COMMUNITY RESOURCES



- **Launched in 2020**
- **Program of Hampton Roads Chamber Foundation (nonprofit)**
- **Managed by EEBC**
- **Multiple tiers of service**
  - **3 centers in Tier 3 – Full Administration Services**

### **TIER 3 Staffing**

- **Average 20 hours of per month per provider (after onboarding)**
- **Estimate 8-10 providers per staff member**
- **This does not include operational administrative time for onboarding, implementation, marketing services, dashboards and program development.**

### **Monthly Tier 3 Cost per center:**

- **\$1500**
- **Includes software fees for CORE and LegUp.**

### **Provider Operational Size:**

- **Licensing Capacity between 42-77**
- **Staff and student turnover is the biggest indicator of admin time**

1

**TIER 1:  
Networking, Collaboration,  
Resources**

This basic level of services and benefits includes:

- Leadership Academy programs
- Director & family childcare Facebook group
- Virginia Shared Services Platform
- Templates
- Teledoc cost
- Dental/vision insurance
- Cash back discount program

**COST**

Annual subscription fee

Childcare Centers

**\$120**

Family Day Home Providers

**\$60**

2

**TIER 2:  
Human Resource  
Management Support**

This intermediate level of services includes:

- ALL TIER 1 SERVICES & BENEFITS
- HR recruitment and screening service
- Legup enrollment and waitlist management software (*not yet available, but stay tuned!*)

**COST**

*Currently in pilot phase. This will have a fee-for-service structure*

3

**TIER 3:  
Full Administration  
Services**

This comprehensive support structure positions your center or family day home for low stress and high success! It includes:

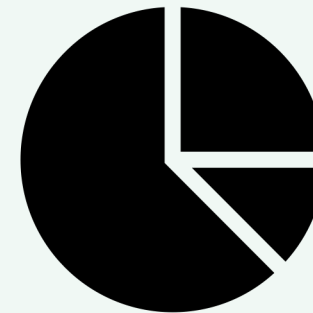
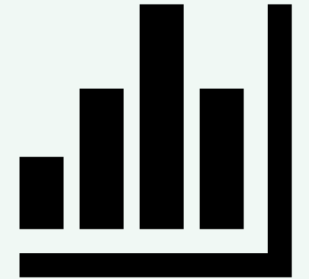
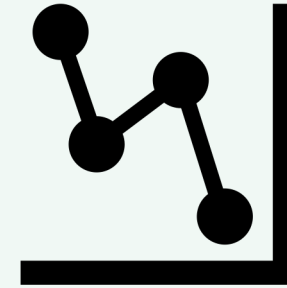
- ALL TIER 1 and TIER 2 SERVICES & BENEFITS
- Early Learning Ventures childcare management platform
- LegUp enrollment and waitlist management software
- Full childcare administration services:
  - Business support
  - Financial management
  - Human resources management
  - Marketing services
  - Tech integration

**COST**

Monthly fee-for-services





# Dashboard Journey



# Procare Desktop

Procare Home | **Dashboard** | Family Data & Accounting | Employee Data & Payroll | Expenses & Ledger | 2022.2

Dashboard | Reports | Utilities |  Supervisor Utilities | Reminders | Help 

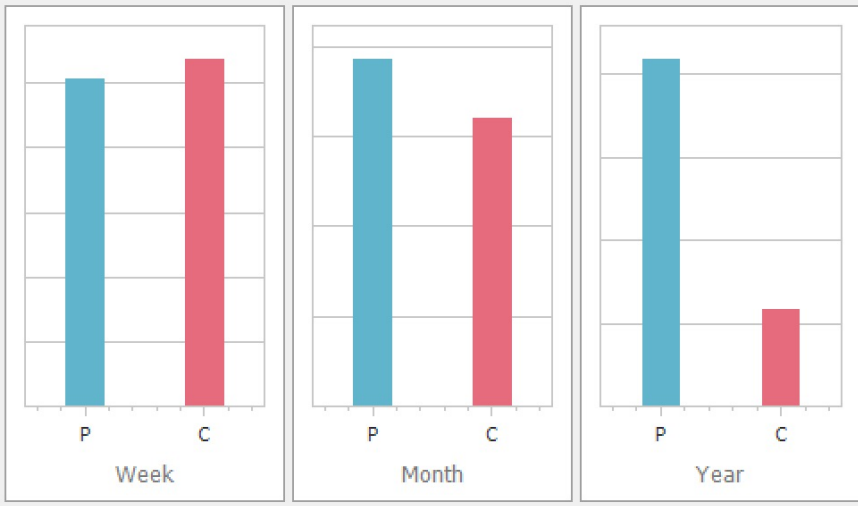
Classroom Children Teacher Counts

Classroom	Students	Teachers
PreK Room	15	2
Infants Room	5	2
Toddlers Room	6	1
Two's Room	11	1
Three's Room	10	1
Kindergarten Room	0	0
Before School	0	0
After School	0	0
		47
		7

FTE Weekly (20 Mar-26 Mar)

Classroom	Total FTE
Infants Room	7.4
Toddlers Room	6.6
Two's Room	13.6
Three's Room	10.6
PreK Room	16.6
After School	8.80

Previous (P) vs Current (C) Revenue in 1,000s



Period	Previous (P)	Current (C)
Week	~1.5	~2.0
Month	~1.5	~1.0
Year	~1.5	~0.5

## Available Data

- Revenue Comparison
- Child/Staff Ratio/Attendance
- Weekly FTE
- Birthdays

# Procure Cloud

## Available Data

- Child/Staff Attendance & Ratio
- Revenue & Payments Period Comparisons
- App usage

ROOM NAME	CAPACITY	STUDENTS (18)	STAFF (3)	CURRENT RATIO
Demo Room	-	0	0	0:0
Rainbow Room	-	5	1	5:1
Turquoise Room	-	3	0	3:0
Green Room	-	4	1	4:1
Purple Room (infants)	-	6	1	6:1
Yellow Room	-	0	0	0:0

### Analytics

#### Billing

	1W	1M	Feb 21 - Mar 21	VS	Jan 21 - Feb 21
TOTAL INVOICED			\$12910	-11.12%	\$14525
TOTAL PAID			\$12850	-4.53%	\$13460
TOTAL IN-PROCESS			\$0	-	\$0

#### Sign In-Out

	Mar 21, 2022	VS	Mar 20, 2022
TOTAL EXPECTED STUDENTS	30	+100%	0
NUMBER OF SIGN-INS	23	+100%	0
NUMBER OF MISSED SIGN-OUT	0	-	0

#### School Stats

7 ROOMS	32 STUDENTS
55 PARENTS	16 STAFF

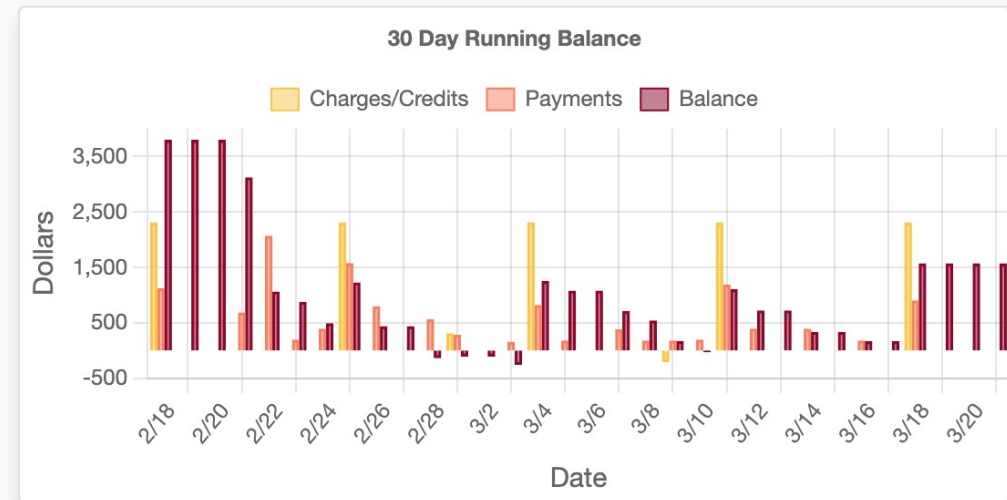
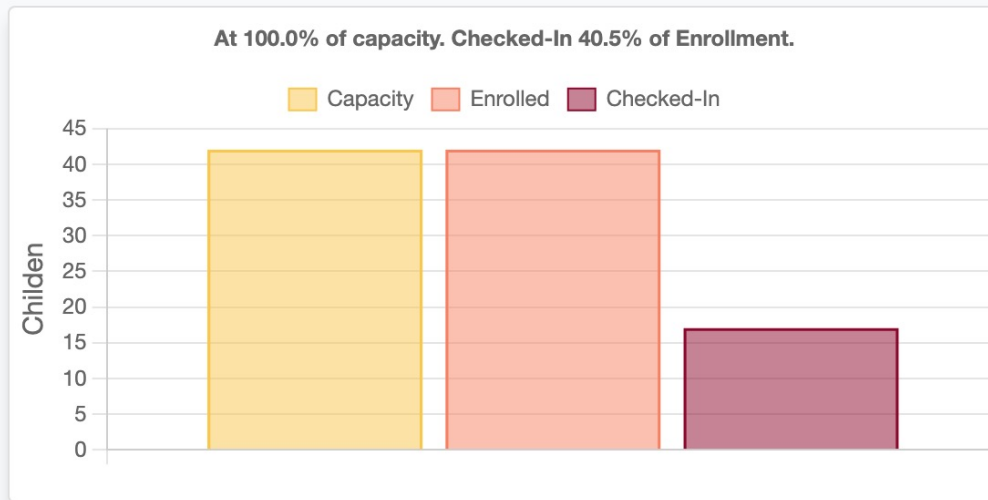
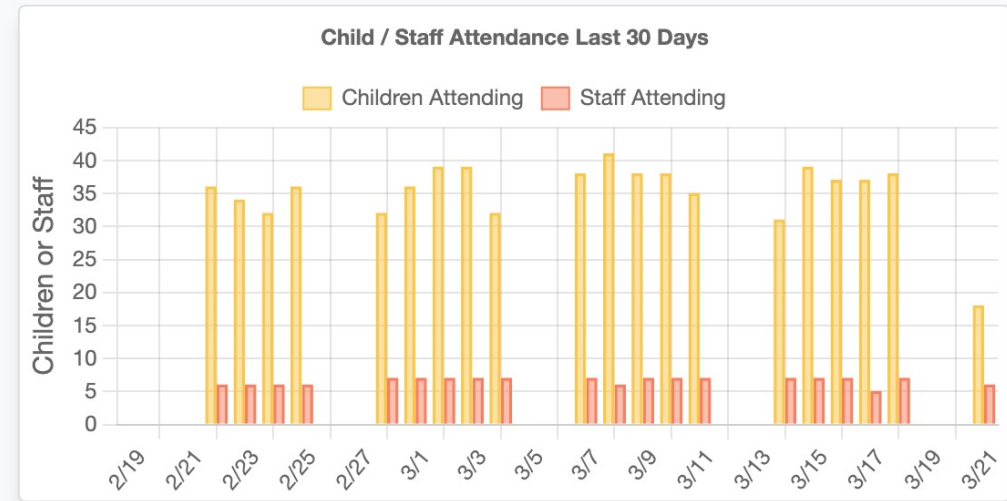
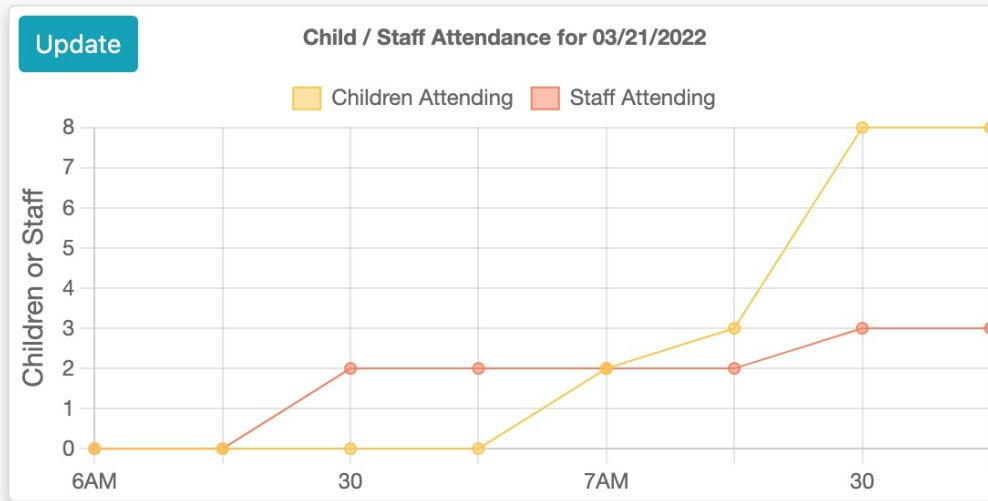
#### Daily Activity

	Mar 21, 2022	VS	Mar 14, 2022
PHOTOS	18	+200%	6
LEARNING	7	-36.36%	11

# Early Learning Ventures - CORE

## Available Data

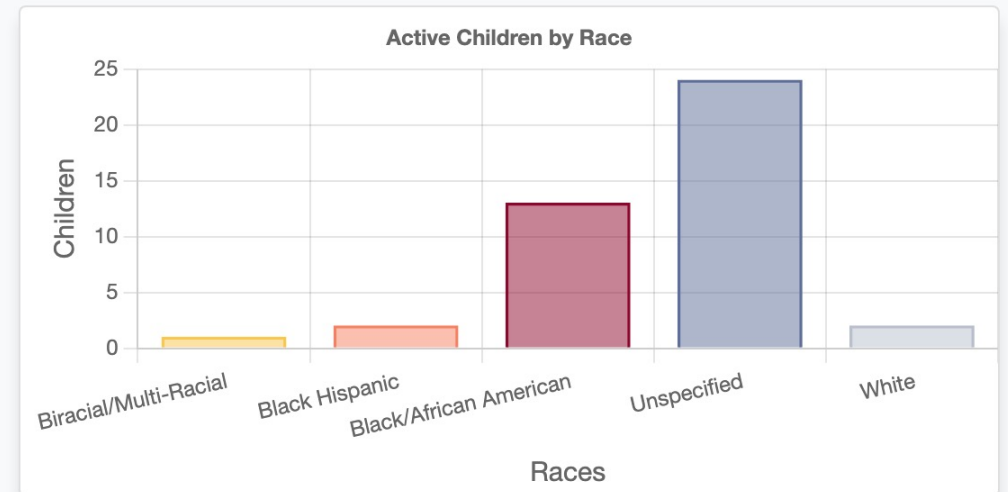
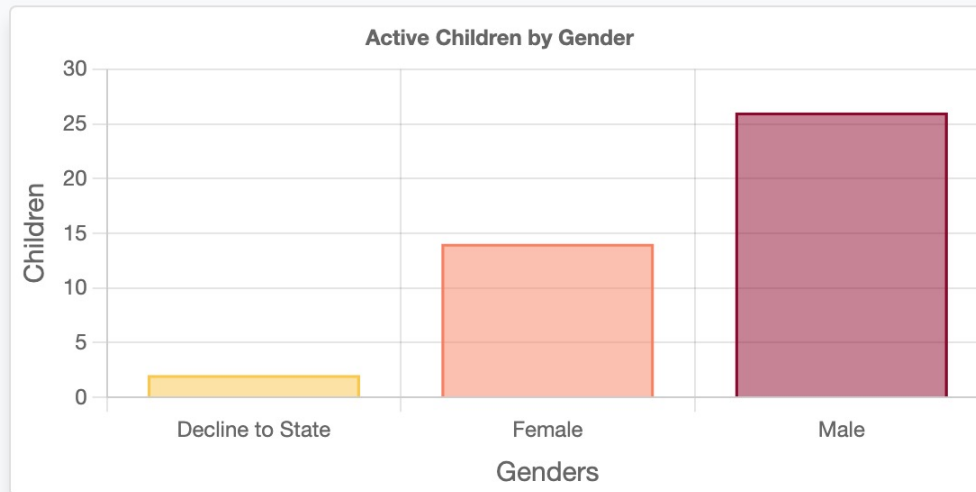
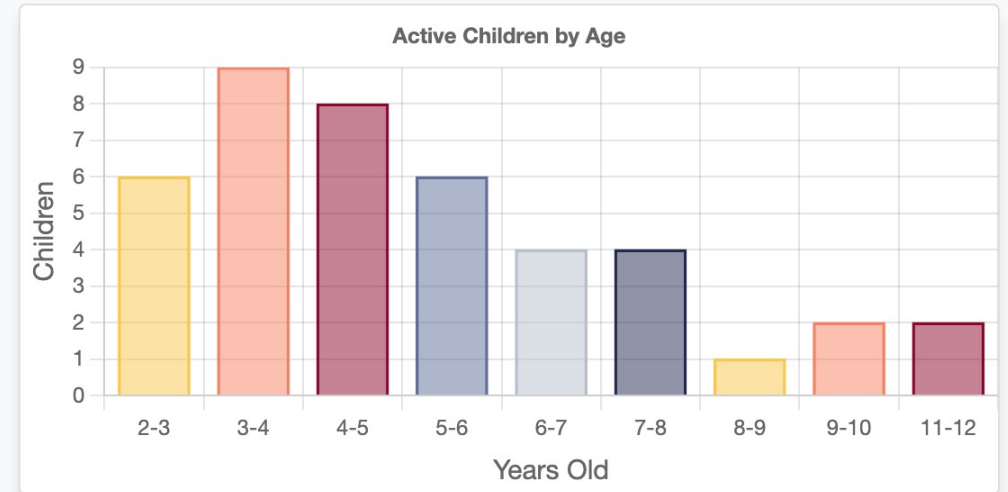
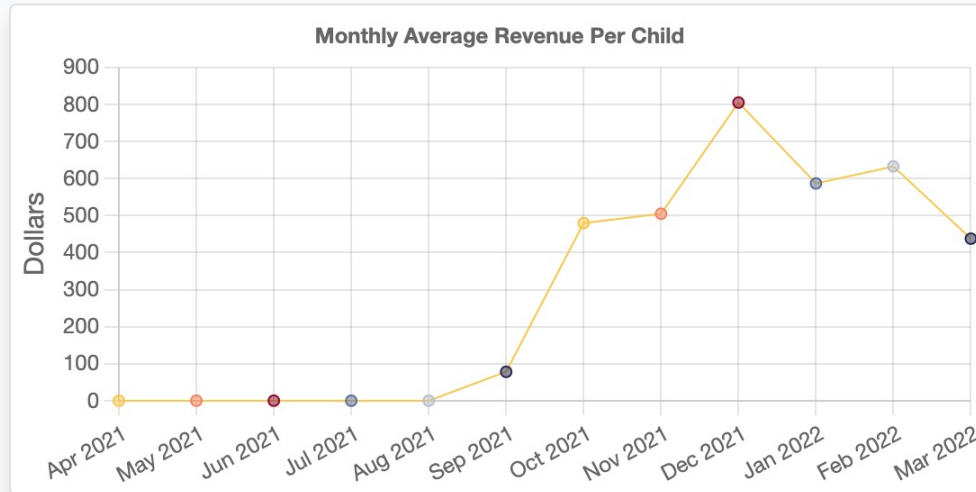
- Similar Data as Procure
- Child/Staff Licensing Expirations
- Daily Attendance
- Monthly Attendance
- % Capacity
- 30 Day AR



# Early Learning Ventures - CORE

## Available Data

- Monthly Revenue
- Variety of Enrollment Demographics



# HRSSA Data Dashboard Sources

QuickBooks

Procure

Alliance  
Core

LegUp

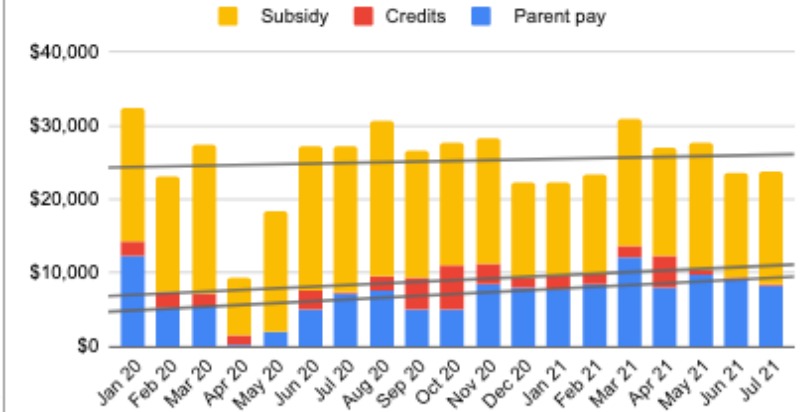
State  
Subsidy

Payroll

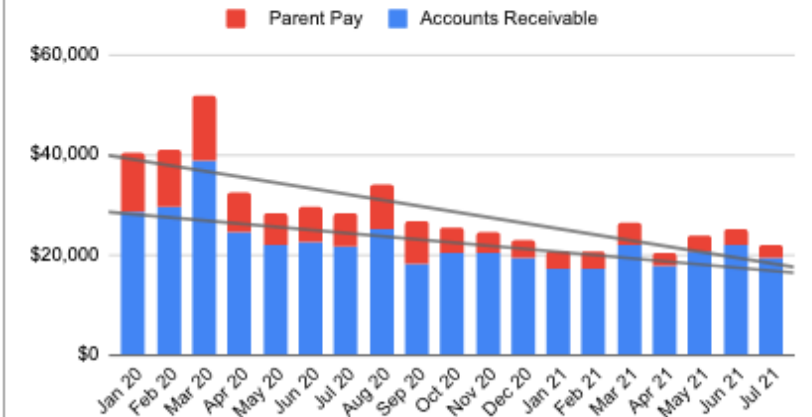
# HRSSA Dashboard - Original

Month	May 20	Jun 20	Jul 20	Aug 20	Sep 20	Oct 20	Nov 20	Dec 20
Subsidy	\$17,102	\$17,583	\$20,460	\$17,912	\$19,828	\$6,961	\$12,974	12335
<b>Accounts Receivable</b>	<b>\$22,068</b>	<b>\$22,658</b>	<b>\$21,644</b>	<b>\$25,124</b>	<b>\$18,189</b>	<b>\$20,307</b>	<b>\$20,251</b>	<b>19224</b>
Parent Pay	\$6,337	\$6,935	\$6,712	\$8,994	\$8,629	\$5,234	\$4,124	3796
Subsidy	\$15,731	\$15,723	\$14,932	\$16,130	\$9,560	\$15,073	\$16,127	15428
<b>Account Aging</b>	<b>\$20,413</b>	<b>\$22,409</b>	<b>\$21,459</b>	<b>\$23,829</b>	<b>\$18,503</b>	<b>\$20,307</b>	<b>\$20,251</b>	<b>19224</b>
Total Parent Pay Aging	\$6,337	\$6,935	\$6,712	\$8,994	\$8,629	\$5,234	\$4,124	3796
Total Subsidy Aging	\$14,076	\$15,474	\$14,747	\$14,835	\$9,874	\$15,073	\$16,127	15428
<b>Accounts &gt; 30 days</b>	<b>\$8,173</b>	<b>\$6,392</b>	<b>\$6,532</b>	<b>\$6,604</b>	<b>\$5,412</b>	<b>\$4,343</b>	<b>\$2,418</b>	<b>\$4,758</b>
Parent Pay % of Revenue	32%	26%	20%	26%	35%	28%	16%	15%
Parent Pay > 7 days	\$5,952	\$5,790	\$5,447	\$7,744	\$7,224	\$4,599	\$3,589	2976
Parent Pay > 30 days	\$4,870	\$4,265	\$3,962	\$4,242	\$5,186	\$3,364	\$2,366	2190
Subsidy > 30 days	\$3,303	\$2,127	\$2,570	\$2,362	\$226	\$979	\$52	2568
<b>Updated Transactions</b>	<b>\$1,655</b>	<b>\$249</b>	<b>\$185</b>	<b>\$1,295</b>	<b>-\$314</b>	<b>\$0</b>	<b>\$0</b>	<b>0</b>
<b>Agency Missed Swipes</b>	<b>1406</b>	<b>1883</b>	<b>687</b>	<b>650</b>	<b>1576</b>		<b>198</b>	<b>303</b>
# of Swipes						5	6	9
<b>Expenses</b>								
	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
# of Payroll	2	2	3	2	2	2	2	3
Labor Costs	\$11,545	\$10,504	\$15,616	\$9,003	\$8,897	\$9,144	\$9,144	\$14,450
% of Labor	0%	0%	0%	0%	0%	0%	0%	0%
<b>Total Expenses</b>	<b>\$20,063</b>	<b>\$17,188</b>	<b>\$23,080</b>	<b>\$16,037</b>	<b>\$14,532</b>	<b>\$16,055</b>	<b>\$16,949</b>	<b>\$23,071</b>
Cost of Goods Sold	1346.3	422.34	616.58	890.81	-1827.04	1209.27	-212.31	1300.03
Total Other Expenses	\$8,518	\$6,683	\$7,464	\$7,034	\$5,635	\$6,911	\$7,805	\$8,620
Total Expenses	\$21,015	\$18,054	\$18,733	\$16,780	\$15,266	\$16,809	\$17,703	\$19,049
Capacity	42	20	22	29	29	29	29.6	28
% Enrolled	48%	52%	69%	74%	69%	69%	70%	67%

Revenue



Accounts Receivables

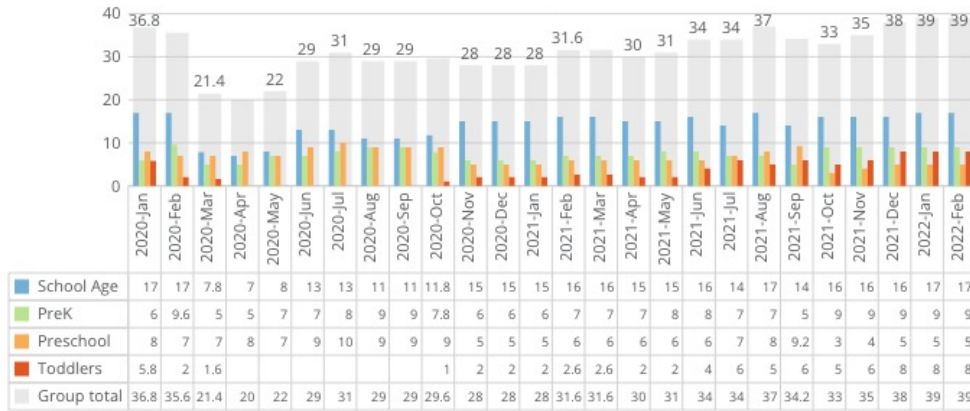


# HRSSA Dashboard Demo

## FTE Enrollment

by Month

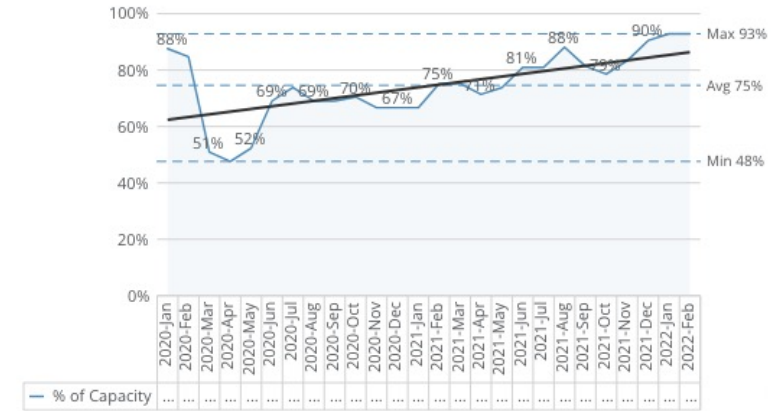
39 Current



## Enrollment % of Capacity

by Month

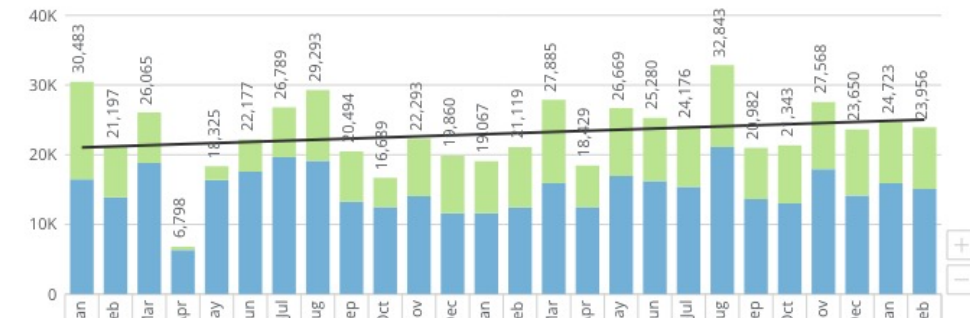
39 Current



## Revenue

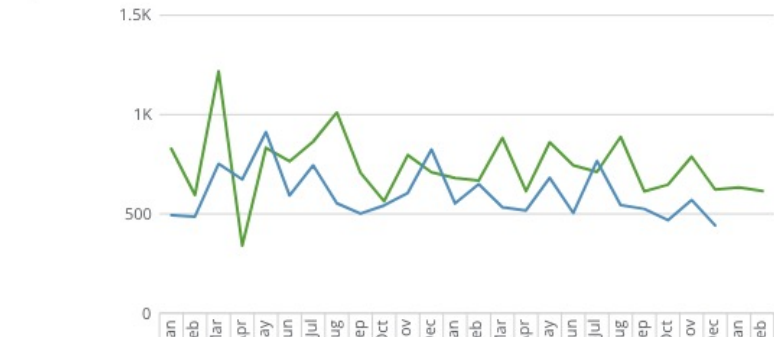
Revenue

by Month



## Revenue vs Cost per Child

by Month





# Business Intelligence: PHLpreK

Create BI tools to track provider compliance around staff credentials

Create BI tools to speed, track and ensure eligibility related to program enrollment

Link to state PD Registry to avoid duplicate data entry and ease ability to ensure staff compliance in real time and measure staff turnover

- PHLpreK is the City's free, quality pre-K program supported by the Philadelphia Beverage Tax.
- All Philadelphia children who are three or four years old as of September 1 are eligible. There are no income or employment requirements.
- PHLpreK funded seats are intentionally located in neighborhoods with fewer existing pre-k seats, higher poverty, and greater childcare burden.
- 3,300 PHLpreK slots provided for 2020-2021 school year via 136 providers.
- 4,000 PHLpreK slots provided for 2021-2022 school year via 156 providers.
- FY 2022-2023, PHLpreK is slated to increase seats.
- 10,000 students served since 2017.

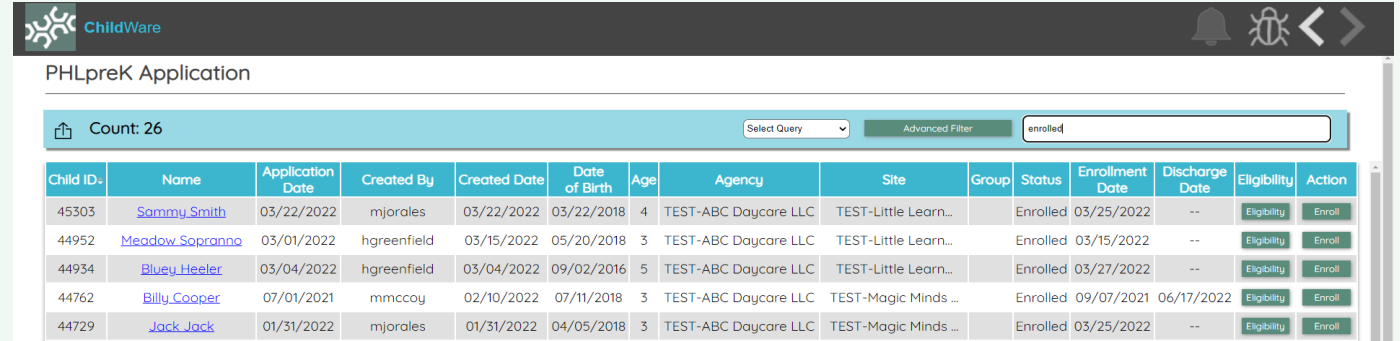
# Enrollment Application & Approval



Data Source:  
ChildWare (CCMS)

1

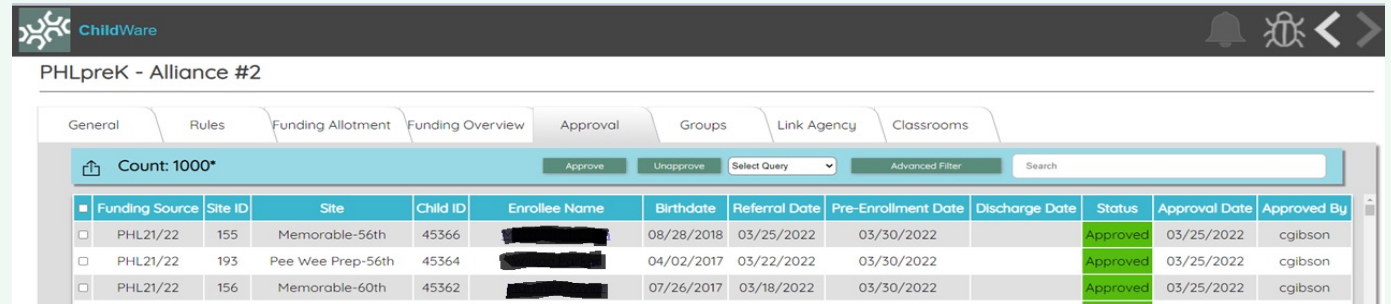
The provider creates child's profile, completes the PHLpreK application questions, and pre-enrolls the child for approval.



Child ID	Name	Application Date	Created By	Created Date	Date of Birth	Age	Agency	Site	Group	Status	Enrollment Date	Discharge Date	Eligibility	Action
45303	Sammy Smith	03/22/2022	mjorales	03/22/2022	03/22/2018	4	TEST-ABC Daycare LLC	TEST-Little Learn...		Enrolled	03/25/2022	--	Eligibility	Enroll
44952	Meadow Sopranno	03/01/2022	hgreenfield	03/15/2022	05/20/2018	3	TEST-ABC Daycare LLC	TEST-Little Learn...		Enrolled	03/15/2022	--	Eligibility	Enroll
44934	Bluey Heeler	03/04/2022	hgreenfield	03/04/2022	09/02/2016	5	TEST-ABC Daycare LLC	TEST-Little Learn...		Enrolled	03/27/2022	--	Eligibility	Enroll
44762	Billy Cooper	07/01/2021	mmccoy	02/10/2022	07/11/2018	3	TEST-ABC Daycare LLC	TEST-Magic Minds ...		Enrolled	09/07/2021	06/17/2022	Eligibility	Enroll
44729	Jack Jack	01/31/2022	mjorales	01/31/2022	04/05/2018	3	TEST-ABC Daycare LLC	TEST-Magic Minds ...		Enrolled	03/25/2022	--	Eligibility	Enroll

2

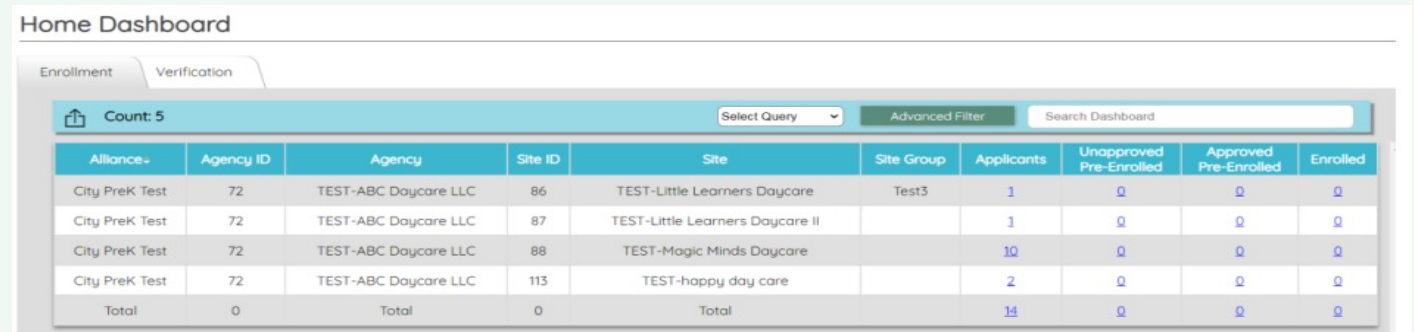
The intermediary (PHMC) receives a notification for approval, the application is reviewed and then approved.



Funding Source	Site ID	Site	Child ID	Enrollee Name	Birthdate	Referral Date	Pre-Enrollment Date	Discharge Date	Status	Approval Date	Approved By
PHL21/22	155	Memorable-56th	45366	[REDACTED]	08/28/2018	03/25/2022	03/30/2022		Approved	03/25/2022	cgibson
PHL21/22	193	Pee Wee Prep-56th	45364	[REDACTED]	04/02/2017	03/22/2022	03/30/2022		Approved	03/25/2022	cgibson
PHL21/22	156	Memorable-60th	45362	[REDACTED]	07/26/2017	03/18/2022	03/30/2022		Approved	03/25/2022	cgibson

3

The provider can track approvals and enrollments on their homepage.



Alliance-	Agency ID	Agency	Site ID	Site	Site Group	Applicants	Unapproved Pre-Enrolled	Approved Pre-Enrolled	Enrolled
City PreK Test	72	TEST-ABC Daycare LLC	86	TEST-Little Learners Daycare	Test3	1	0	0	0
City PreK Test	72	TEST-ABC Daycare LLC	87	TEST-Little Learners Daycare II		1	0	0	0
City PreK Test	72	TEST-ABC Daycare LLC	88	TEST-Magic Minds Daycare		10	0	0	0
City PreK Test	72	TEST-ABC Daycare LLC	113	TEST-happy day care		2	0	0	0
Total	0	Total	0	Total		14	0	0	0



# Enrollment Tracking & Use of Data



## Enrollment Tracking

The system can track:

- # of enrolled children
- # of approved pre-enrolled
- # of unapproved pre-enrolled
- # of applicants

## Use of Data & Analysis

- Monitoring of full enrollment by *provider*  
(*reporting twice a week*)
- Track vacancy trends (*monthly slot analysis*)
- Track applicants (*waitlist*)
  
- Used to support recruitment
- Used to determine annual seat allocation
- Used to demonstrate need and use of program



# Staff Credential Data Collection Goals

## Recruit and retain qualified staff

Every Provider must meet the PHLpreK staff qualifications requirements.

Providers are responsible for staff submitting their credentials within the PD registry.

The PD registry verifies the staff's career pathway level based on the credentials submitted.

PHMC reviews and tags staff as compliant or not compliant based on PHLpreK requirements.

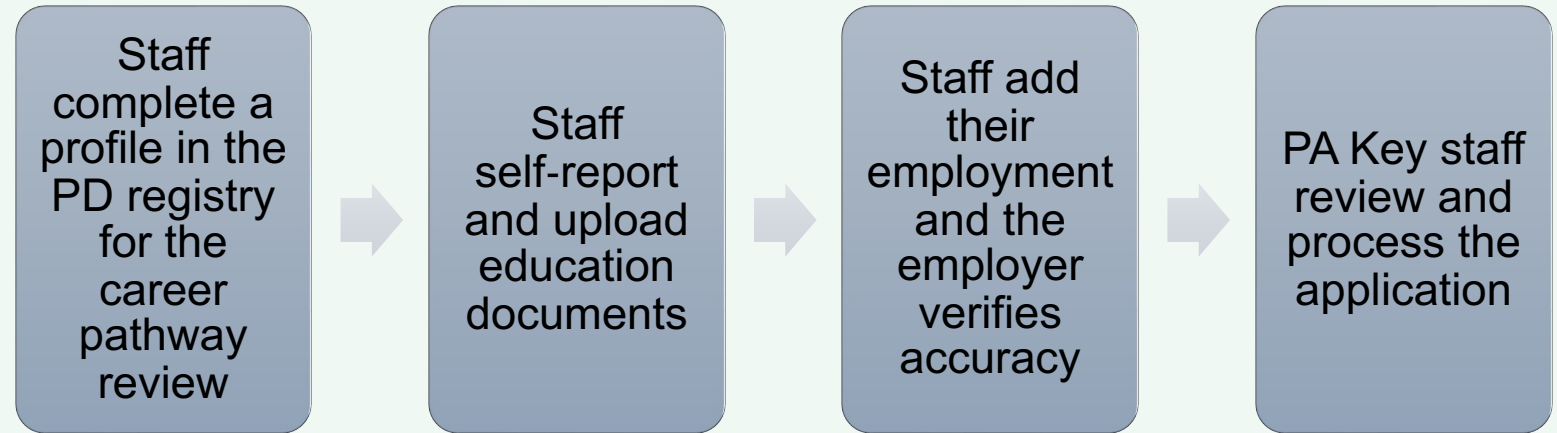
# Staff Qualifications & Program Compliance



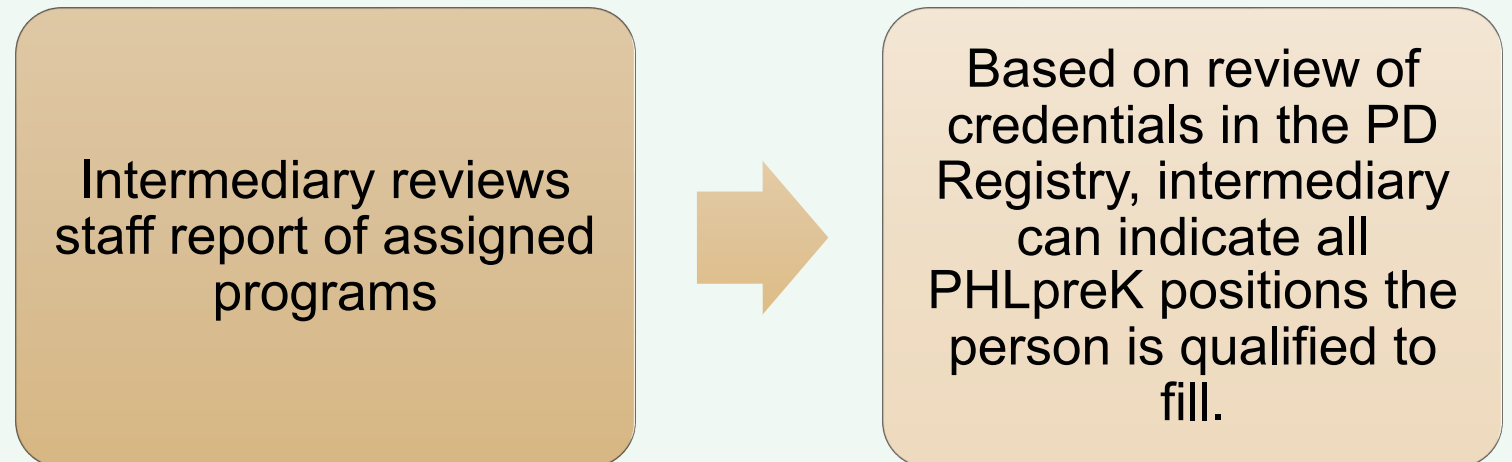
Data Source: PD  
Registry &  
PHLpreK Module

## Staff Qualifications Process for Tracking

### Provider and Staff Steps in the PD Registry



### Intermediary Review for Compliance



# Staff Qualifications & Program Compliance



## Program Compliance Process in the module

Program: HEAVENLY DAYCARE AND LEARNI... Employed Between: 1/1/2020  
 And: 11/9/2020 Show Staff: Show only PHLprek staff

Staff Compliance Status - Compliance Monitor View

id	Name	Contract Status	Programs :	MPI #	Name	Position Title
482		Guest	HEAVENLY DAYCARE AND LEARNING CENTER INC	10114011-0001	<a href="#">White, Snow</a>	Group Supervisor/Teacher

Completed Higher Education

Title	Program Name	Status	ECE Credits	Award Date
Bachelor's Degree Early Child Education	Chestnut Hill College	Self-Reported		5/11/2013
Bachelor's Degree ECE	Chestnut Hill College	Self-Reported		5/11/2013
Total				

No CDA Certificates On Record

No Teacher Certificates On Record

Staff name is hyperlinked to a credential report

The report shows status of degree or credential.

1

Compliance Selection

**PHLprek**

▲ Not Compliant  
Assigned PHLpreK Seats 12

Compliant  Not Compliant

Reason  
Test

---

Snow White  
▲ Lead Teacher

Compliant  Not Compliant

2

Staff can flag the teacher and classroom as complaint or not compliant.

# 3

## Program Compliance Process in the Module

### Staff Qualifications & Program Compliance

Click on the Name to view education and credential

Programs	Name	Position Title	Part Time/Full Time	Career Pathway Level	Career Pathway Expiration Date	Status of Application	Assigned Classroom	Teacher Compliance Status
TINY STARS	<a href="#">Snow White</a>	Director	Full Time	Not Applied			Orange	Y
TINY STARS	<a href="#">Betty Boop</a>	Assistant Group Supervisor/Assistant Teacher	Full Time	Verified-Level D	12/27/2021	Applied	Orange	Y
TINY STARS	<a href="#">Cookie Monster</a>	Group Supervisor/Teacher	Full Time	Not Applied			Raspberry	N/A
TINY STARS	<a href="#">Daffy Duck</a>	Group Supervisor/Teacher	Full Time	Not Applied			Raspberry	Y
TINY STARS	<a href="#">Winnie Pooh</a>	Assistant Group Supervisor/Assistant Teacher	Part Time	Not Applied			Strawberry	N/A



### Use of Data & Analysis

The system can track:

- Staff's verified career pathway level/credentials
- Compliance of staff qualifications per PHLPreK requirements
- # of classrooms tagged as PHLpreK at the program
- PHLpreK seats in each classroom and other funding sources served in the classroom
- Teachers assigned to classrooms (Lead & Assistant Teacher)
- Staff turnover





Opportunities  
Exchange

For More Information ...

# Opportunities Exchange

Profiles, Tools,  
Resources, Metrics,  
Issue Briefs and more ...

[www.oppex.org](http://www.oppex.org)

