



CHARTER FOCUS

A Quarterly Journal for Charter School Business Managers

ANNOUNCEMENTS

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The Colorado League of Charter Schools is accepting conference presentation proposals for the Colorado Charter Schools Conference scheduled for February 23-24, 2012, in Broomfield, Colorado. The theme of the 2012 Conference is "Lead. Innovate. Educate." Visit www.coloradoleague.org/charterconference for more info. Deadline: November 1.

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Welcome

Welcome to the October 2011 edition of *Charter Focus*, a quarterly journal for charter school business managers published by the Colorado League of Charter Schools. This quarter, we feature articles about outsourcing, such as how to decide when outsourcing is best, and how to use outsourcing to run an efficient charter school. You will find some incredible best practices from those who know this topic best – your peers and colleagues, as well as experts in the field. We think you will find the tips in these articles extremely valuable and hope you will keep this newsletter and refer back to it throughout the school year.

This edition of *Charter Focus* also includes information about the League's newest Group Purchasing Contract for Commercial Insurance (see page 11 for more details).

If you have any comments about *Charter Focus*, or if you'd like to submit an article for a future edition, please contact Tiffany Kallevik at 303-989-5356, ext. 116 or tkallevik@coloradoleague.org. Your feedback and submissions will help make *Charter Focus* an even more valuable resource and avenue to share best practices with other charter school business managers.

BY CAROL TVEITMOE AND TIM MATLICK

Outsourcing: When, Why & How

Charter schools are about quality education for students. However, charter schools need to run efficiently as well. The line between hiring staff or outsourcing often appears fuzzy. At those times it makes sense to go back to the fundamentals... educating students. As an administrator your time can be consumed by running the business of the school. And that can sometimes happen at the expense of student learning.

So how do you create more time and run a more efficient school? Start by defining the level of the work required and the time needed to accomplish that work. From there, the answer splits into two directions:

Option 1: Hire the most qualified person for the least amount of time needed to accomplish a task.

Option 2: Look for outside solutions that will save you money.

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If used correctly, outsourcing can create significant savings for schools. But if used incorrectly, it can increase your expenses substantially without providing much benefit to the school. So how do you know when to outsource a school based service?

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Temp to Hire: A Great Option When You're in a Pinch

Imagine being in the middle of transitioning all accounting functions from your home school district to local control at your charter school, and then a key member of your accounting staff resigns. This was the very situation we found ourselves in at Peak to Peak Charter School this past year. We were on the fast track with the accounting transition when one of our key staff members departed, leaving us in a difficult spot that required an immediate replacement. This situation can affect any charter school where resources are scarce, everything is urgent, and critical skills are needed now.

By the time you have written a job description and received approval, advertised the position, screened applications, conducted interviews, completed background checks, offered the job, and then waited two weeks to bring a new employee on board – it can take several weeks, or even months, to fill a critical role. There are times when you simply can't wait that long to get a new employee on the job. One way to speed the process for an immediate hiring need is to use 'temp to hire' employees through various staffing organizations.

Here are some of the reasons why this option may work for you:

1. Get an employee on the job quickly

When you are in a hurry to get an employee on the job, using a staffing agency can be a great asset. Staffing agencies attract employees looking for work and they pre-screen their candidates to bring you the most qualified people for the skill sets required. Most of these candidates can start working immediately.

2. No long term commitment or risk of wrongful discharge or unemployment liability

Whenever you hire a new employee, you assume the potential liabilities that come with making a wrong hiring decision. When an employee is not working out, the process of documenting and ultimately terminating an employee can be lengthy, exhausting and expensive. When a



temporary staffer does not work out, there is no risk of a wrongful discharge lawsuit or being charged for unemployment insurance. You simply let the staffing agency know that you are not satisfied with the temp employee, and they will find you another candidate.

There are times when
you simply can't wait that
long to get a new
employee on the job.

3. Background and reference checks are already done

'Temp to hire' employees have already been screened by the staffing agency with background checks, reference checks, and sometimes even drug screening. This saves time and money.

4. Candidates can be pre-screened for needed skills

Depending on the skills needed for a given position, the staffing agency may already have conducted skills tests that allow you to find the candidate with the best skill match for your position. For an accounting position, staffing agencies can test for

multiple skill sets such as Microsoft Excel, Accounts Payable, Accounts Receivable, and various accounting software packages.

5. Gives you a chance to see if the candidate is a good organizational fit

It is sometimes hard to gauge from an interview process how well a candidate will fit within the organization. While you may be able to assess skills and abilities, it is more difficult to determine if the candidate's personality and temperament will fit well with your existing employees. Using a 'temp to hire' allows you time to observe how well the candidate integrates into the organization before committing to a long-term employment relationship.

All staffing agencies will charge an hourly rate that includes their mark-up and overhead costs. At our school, this rate was nearly equal to our hourly rate plus the cost of employee benefits, making the cost a non-issue. Hiring a 'temp to hire' employee may not be the right solution for every hire, but it can sure be a big help when you are in a pinch and need to get a critical employee on the job in a hurry.

Sam Todd is the Executive Director of Operations at Peak to Peak Charter School, a K-12 charter school in Lafayette (peaktopeak.org).

Outsourcing: When, Why & How (continued)

WHEN TO CONSIDER OUTSOURCING:

- When outsourcing is a break-even or cost-savings option (cheaper than paying for an employee with benefits).
- When keeping a service in-house is “zapping” your time and energies (make your problem someone else’s problem to deal with).
- When you do not have/cannot find the proper skill set for a specific need (and not having it will get you into trouble).
- When you have a limited need (specific time period....avoid unemployment expenses!).

WHEN NOT TO CONSIDER OUTSOURCING:

- When you are doing it out of convenience for your staff instead of working to solve a problem.
- When it will cost you more than hiring an employee full/part-time.
- When you might be able to cross-train someone for multiple jobs.
- When a vendor asks you to sign a long-term agreement without any “out” clause.

BASIC PITFALLS TO AVOID WHEN CONSIDERING OUTSOURCING:

- First and foremost, are you wanting to outsource because it is convenient? Or because you don’t want to put in the upfront time to develop a long-term solution? If so, your motivation is wrong! It is time to hunker down and develop a long-term in house solution that will keep you from having to deal with this problem again.
- A salesperson may make it sound like you will be rolling in the cash if you just outsource to them. This sounds great, but have you really stopped to think about all the “other” duties that your staff undertake that you would not have around anymore? Example: if you outsource your payroll services and lay off your financial secretary, who will process vouchers, collect funds for milk/juice, handle petty cash and a plethora of other duties that are not payroll related?
- Buying the whole enchilada! If you are looking to outsource janitorial services, do you really need all your classrooms cleaned every night? That is what they sell. Negotiate it down to bathrooms and hallways every night, and classrooms every other night. This will teach students to clean up

after themselves and create significant savings for the school.

- You have some major problems to solve and don’t know of anyone that can help. In other words, you have a huge fire burning and outsourcing seems like the only way to fix it. That is where being a charter school is a huge asset. Charter schools help each other out all the time. By networking with other charters, the Colorado League of Charter Schools or the CDE Schools of Choice Unit you can usually find what you need. It only takes a quick call before someone will either point you in the right direction or find the right person to help out.

Outsourcing can be a great option if you are diligent and focused about When, Why and How you go about using it. It is not a quick fix but it can be a beneficial long-term solution if approached correctly.

Carol Tveitmoe is the Finance Manager and Tim Matlick is the Principal at Woodrow Wilson Academy, a K-8 charter school in Westminster (wwacademy.org).



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Changing Your Team: How to Transition to an Outsourced Provider

You've made the decision to outsource a department or function of your charter school. You've researched the competitors, finished a bid process, and signed a contract. Now, reality sets in. It's time to give up that portion of your school activities to the provider. This is easier said than done because it requires both a change in processes and a change in attitude. Change is always difficult. It's even more difficult when you have to trust critical activities to an outside agency. It may feel uncomfortable or even risky. In order for the transition to be successful, you need to buy into the programs and processes of the outsourcing company. Ideally, you would have made that decision prior to signing the contract. Here are some tips to help you transition smoothly.

1. Adjust your mindset

First, adjust your mindset about the way that you've been doing things. Especially if you or your staff are resistant to change, prepare in advance about what has to be done and how it needs to be done. It's very likely that the company that you hire will not do things the same way you did. The process will be different, paperwork and reports will likely look different, and the results should also be different. Communicate clearly to staff that your desired ends will soon justify the means.

2. Address staff concerns

Understand that some staff will worry about giving up control, losing a job, or learning how to get good results from the new provider. Let internal personnel know that it's okay to let go and that you still value them. The good news is that all can use this additional time to focus more on your academic mission, the central reason for your existence. You will also need to count on the outsourcing company for help during this transition. Depending on which functions you are outsourcing, the company should be able to walk you through the new processes. Your internal practices will need to change as well. In some cases, it may

simply be eliminating internal procedures and making information available to the outsourcing company. In others, you may have to perform some tasks prior to the outsourcing company taking on the duties. Find out what is required. Companies will often be able to tell you how they work with other clients. Often the outsourcing company will have written procedures for you. Plan for time to train all the key players on the new processes.



Change is always difficult. It's even more difficult when you have to trust critical activities to an outside agency. It may feel uncomfortable or even risky.

3. Let the outsourcing provider do its job

Once you've begun to make the internal change, you need to let the outsourcing company do its job. You don't go to a restaurant and tell the chef how to cook. Perhaps a better example is that you don't go to the restaurant and order an entrée, but then prepare your own appetizer and dessert. If you conducted your due diligence prior to making the decision to outsource, you can take comfort in

knowing that you've hired experts in their field. Let them do their job in the way they consider to be most effective. By all means, if you have suggestions, share them, but keep in mind that their practices are likely tried and proven to work, which is, of course, why you contracted with them in the first place.

This "giving up" process is often more difficult than you would think. If you are used to performing tasks internally, all of a sudden it's like throwing a bunch of paperwork or information into a magic black box. Many people want to peek inside the box. It's okay to peek, but it's not ok to try to manipulate the box. The outsourcing company is the magic, enjoy the magic.

4. Make your expectations clear

To maximize your results, make sure that your expectations are clear prior to entering into the contract. Then, keep communications open throughout the contracted period. Depending on the complexity of the services, your needs may change. The outsourcing company may change its staffing or procedures. If some of those affect you adversely, the company needs to know. Most outsourcing companies work well because they are efficient, but that doesn't mean that they always know what you are thinking.

5. Be proactive

It is especially important to communicate right away if you are not receiving what you believe you paid to receive. There is nothing worse for a vendor than to be doing what they always do for clients only to find out it isn't what you want, especially if it's three to six months into the contract. Once you are up and running, adjusting should get easier as you see the fruits of your decision and begin to reap the benefits of having more time to focus on other activities valuable to your organization.

Doug Hering is a Consultant at Charter School Management Corporation, Inc. (csmci.com).

The Colorado League of Charter Schools offers an exclusive Group Purchasing Program (GPP) to help its members reduce costs through collaborative purchasing strategies.

The GPP provides member schools with access to quality products and services at significant cost savings. Members benefit from the League’s exhaustive due diligence process and aggressive negotiations that secure contracts with highly favorable terms and conditions for collective buying power.

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Remember to Calculate Opportunity Cost!

Opportunity cost is defined as the value of the next best alternative to an action or purchase. We are all familiar with this basic principle, and have instinctively factored it into our decisions since an early age. A kindergartener knows that if he chooses to play with blocks instead of drawing, that through his choice he has forgone the enjoyment that drawing would bring him. He probably couldn't put it into words, but he has subconsciously made this calculation in his head. In business, opportunity cost is a critical, yet often overlooked, factor to effective decision making. Resources are finite, and when managers choose to pursue one activity, they are choosing not to pursue the next best alternative.

Opportunity costs are real, but accountants will confirm that they do not show up anywhere on an organization's financial statements. While they are not bookable, opportunity costs can and should be calculated before making complex or expensive decisions such as whether or not to outsource an activity. If you decide to hire a payroll company so that you can create value for your organization doing

another activity instead, the difference between the new value you created doing the other activity and the cost of the payroll company equals the opportunity cost to your school if you had decided to run payroll yourself. Similarly, opportunity cost can be calculated as the return on investment your cash could earn if you choose to spend rather than invest it.

Let's look more closely at how opportunity cost can factor into outsourcing decisions. Assuming a manager is comfortable with the qualitative costs of outsourcing such as flexibility, trust, quality, dependability, timeliness, and reliability, the manager should also analyze the decision using as many financial variables as possible. In particular, pay close attention to and account for the real implications of opportunity cost. Despite its importance in outsourcing decisions, managers often do not actually calculate and analyze opportunity cost as a decision support factor. Instead, the decision is driven by simply comparing direct costs alone. For instance, a manager will decide whether or not to outsource an activity based on the cost of assigning the task to an internal

employee who makes \$ X an hour or to outsource for \$ Y an hour. While logical, this simple equation misses opportunity cost entirely, and therefore the manager does not have complete information to make the wisest decision.

Outsourcing is an important decision with complex implications, and effective managers should factor in as many variables as possible when analyzing their decision to "make or buy" an activity.

Let's explore how one might incorporate opportunity costs in their decision making through a fictional charter school scenario. For simplicity's sake, let's calculate opportunity cost as the average return on investment a school earns- in this case I will use 5% (a rate you could earn in interest revenue if you invest it).



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In this example, a charter has opened a new computer lab, and the lab will require a 0.5 increase in IT support staff full time equivalent (FTE). Assuming (for simplicity's sake) an IT support employee will cost \$100,000 per year, employing 1 FTE to do the work of 0.5 FTEs will burden the school with 0.5 FTE of excess capacity, which creates not only waste, but also an opportunity cost. Alternatively,

outsourcing the work will cost the school 0.5 FTE plus the margin the company charges, but will allow you to invest the excess funds in other activities (such as earning 5% of investment). A mistake that most small to midsize organizations make in analyzing such decisions is ignoring the opportunity cost — investing in excess FTEs means forgoing the return on investment the company would make

by using that money in another way. This opportunity can and should be calculated and factored into the decision.

The table below illustrates this point, and provides an example of how one might run such a calculation. In this example, keeping the job in-house creates extra opportunity cost (in lost interest revenue), while outsourcing creates extra revenue (through investment). (Pistole, 2005)

| OPTION | STAFF FTE | EXCESS FTE | BURDEN | SUBTOTAL COSTS | TOTAL COST |
|------------|-----------|------------|---|----------------|------------|
| In House | 1.0 | 0.5 | Cost at \$100,000 per FTE | \$100,000 | |
| | | | School opportunity cost: \$50,000 at 5% ROI | \$2,500 | |
| | | | | | \$102,500 |
| Outsourced | 0.5 | 0.0 | Outsource provider's staff cost: \$100,000 per FTE | \$50,000 | |
| | | | 15% Margin charged to your school | \$7,500 | |
| | | | Opportunity cost of school funds invested at 5% ROI: 5% of (100,000 - \$57,500 = 42,500) | -\$2,125 | |
| | | | | | \$55,375 |

Outsourcing is an important decision with complex implications, and effective managers should factor in as many variables as possible when analyzing their decision to “make or buy” an activity. In addition to other qualitative and

quantitative variables, a manager should always factor in the cost of the next best alternative—the opportunity cost, as doing so will help you gain a clearer picture of the true implications of your decision.

Works Cited: Pistole, L. a. (2005). Making IT outsourcing work for smaller enterprises. *IT Professional*, 12-17.

Marco Rafanelli is the Director of Member Business Services at the Colorado League of Charter Schools (coloradoleague.org).



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Outsourcing Vocational Courses: Why and How



Vocational education has long suffered a bad reputation, that it was “courses for dummies” and for non-college bound students or at-risk students as a way to keep them in school until they had enough credits to graduate. As school budgets declined and emphasis on academic achievement increased, vocational courses were the first to be eliminated. Business leaders, however, complain they have seen a serious decline in the numbers of students prepared to enter the workforce.

Businesses see the need for vocational education in high school and many try to partner with schools to mentor students and help prepare them for their futures. Because of budget constraints, students have fewer and fewer opportunities to accomplish this. Given that some 20% of college students drop out in their first year, and many more change their majors before they graduate because they have no idea what they want to do, there is clearly a need for education that prepares students for the workforce as well as helps them discover where their interests and talents lie.

Career and technical education faces challenges to restructure its programs, rebuild its image, and deliver courses affordably. The purpose of vocational education courses is to prepare students for the world that is and will be - not what was. Because the work world has

changed, a relevant program will look at outsourcing its offerings so it can expand on its vocational program and the way it is delivered.

What is outsourcing in education? Why would administrators consider it for vocational classes? The question with the greatest priority must be what benefit is there to the student?

Outsourcing in education means making use of the many and excellent classes available online. Classes can be done in computer labs with a supervising teacher or they can be done at home or wherever a student has good internet connection. Students have been known to attend class at a local library, a coffee shop or a fast food restaurant. The classes can be pre-recorded, with assignments and tests available. The classes can also be live, taught through web-conferencing, allowing interaction with a teacher.

Why outsource vocational education classes? The impact outsourcing vocational education can have on school budgets is significant. Outsourcing teaching to online providers results in the need for fewer specialty teachers on staff and no specialty classrooms. The list of classes available is expanding every day from basic classes such as Workplace Essentials and Computer Skills for the Office to introductions to trade careers taught by professionals in the field.

Business leaders, however, complain they have seen a serious decline in the numbers of students prepared to enter the workforce.

Proponents of the expansion of online courses hope to combat the rising costs of teachers' salaries and benefits while providing more options for students. Also, by allowing students to learn independently, it can also help mitigate overcrowding, thereby improving the quality and value of education.

The best answer to “why outsource” is that it benefits students. Online courses offer exciting opportunities for students previously not available to them. Among these is the chance to experience wider course offerings than are available in a traditional environment. When schools partner with online coursework providers, students can pool their interests with peers across the district, state or nation. Plus, the student who needs a course to graduate but can't find it at a convenient time can often fulfill the requirement online.

With technology improving daily, and the availability of excellent online coursework rising, there is sure to be a prolonged debate on its role as a cost saver in K-12 education and its benefits to students. Quality education must be the primary goal and in today's economy, that often includes finding ways to educate well at a lower cost. The benefits online courses provide in terms of reducing expenses are clear. With hundreds of schools already providing an online option to their students, online provider companies are moving forward with plans to broaden the scope of education through sources outside the mainstream educational sector.

Jim Young is the CEO of e-Tech Academy, a provider of vocational education classes delivered online provided as either a live classroom or recorded on-demand (e-techacademy.org).

COLORADO LEAGUE OF CHARTER SCHOOLS VENDOR MARKETPLACE

This directory is not an endorsement by the Colorado League of Charter Schools of any particular vendor, but rather an easily accessible source of vendors who support Colorado charter schools and want to help them succeed. We encourage you to support all of our participating vendors as you search for products and services. In choosing any vendor, the League recommends that schools refer to applicable policies on competitive bidding, check references, and contact the League if additional information is needed. View the Vendor Marketplace online at www.coloradoleague.org.

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Outsourcing: A Parent Engagement Model



Outsourcing can have negative connotations because of its common association to job loss through offshore outsourcing. However, outsourcing can also signal the tapping of valuable resources (knowledge or social) in your local area that might not exist within your school's current employees or networks, this is termed nearshoring.

Nearshoring can provide a number of benefits because it expands the reach of your school throughout your community.

Nearshoring can provide a number of benefits because it expands the reach of your school throughout your community. Imagine going to church on Sunday or buying groceries at the nearby store and hearing people who are directly connected to the children at your school expounding the merits of the charter school down the road. These conversations are invaluable when trying to grow your school.

One of the considerable risks involved with outsourcing is that the contracted individual or company won't have the

same knowledge, understanding and connection to the mission and vision of your school.

Outsourcing to the parents of your school is a smart way around this particular issue. Parents have buy in, care deeply about the success of the school and are often willing to give countless hours in order to see the mission and the vision extended. You won't have to worry about whether the individual has the best interest of the school as his or her motivation; if their child is enrolled at your school then they likely want to see your school succeed as much as you do.

Outsourcing to parents as volunteers will take an initial investment of time and training, but creating a sustainable form of parent engagement pays off in the long run with dividends. More engaged parents typically feel a sense of unity and pride as they help the school and their children succeed—they act as spokespersons for the school and a more engaged parent body can lead to a decrease in truancy and absenteeism. Although these are parents, they will also be doing valuable work for your school so it is wise to treat them as though they are employees: have high expectations, sign a contract, hold them accountable and most importantly,

...make sure to treat them as though they are employees: have high expectations, sign a contract, hold them accountable and remind them of their value.

thank them and remind them of their value. Keep in mind that it is easier for someone to commit to something with fixed expectations and timelines.

Benefits of engaging parents through outsourcing:

- Create a pipeline for your PTO and Charter School Board
- Increase personal investment in the outcomes of the school
- Obtain greater direct feedback from parents and community members about the job you are doing educating their children
- Provide two-way dialogue
- Create a sense of pride within parents, knowing that they have contributed to the success of the school and that they have valuable skills to share

Parents might be able to:

- Offer translation services at events or with materials
- Provide financial literacy education to students at school
- Manage street crossings before or after school
- Fundraise for your school

Outsourcing to your school's parents can provide valuable long-term benefits. By increasing parent engagement and buy-in, this model has the potential to create a stronger school community while yielding great results.

Jason Callegari manages the Colorado Charter Advocacy Network (Colorado CAN) for the Colorado League of Charter Schools (coloradoleague.org). He is also a member of the Executive Committee for the State Advisory Council on Parent Involvement in Education.

Colorado League of Charter Schools Announces New Group Purchasing Contract for Commercial Insurance

The Colorado League of Charter Schools (the League) announces a new group purchasing contract with HUB International Insurance Services for Commercial Insurance. This agreement will offer the following Property and Casualty insurance programs to League members:

- Property
- Automobile Liability
- General Liability
- Workers' Compensation
- Directors & Officers
- Employment Practice Liability
- Crime (money & securities, forgery & alteration, employee dishonesty)
- Cyber Liability
- Employee Benefits Liability
- School Board Legal Liability/Errors and Omission
- Educators Legal Liability
- Abuse and Molestation
- Student Accident

The League worked diligently to competitively screen commercial insurance brokers and to carefully examine their competencies through a three stage evaluation. The evaluation process focused on identifying the broker that offers the best overall value to Colorado charter schools and recognizes their combined purchasing power as a group. Evaluations and negotiations relied on feedback from member charter schools. HUB emerged as the leader because of their expertise, customer service and resources they can make available to Colorado charter schools.



HUB is dedicated to the charter school market and currently works with over 30 League members. HUB's Charter School practice is designed to offer a comprehensive insurance program to any Colorado charter regardless of stage of development or size.

This agreement will offer League members:

- A full-service brokerage and risk-management program designed exclusively for Colorado charter schools.
- Custom website for Colorado charter school clients to address loss control services, claims support, and human resources tools and forms.
- The position to qualify for a Risk Purchasing Group to maximize premium savings.
- Advising on the possibilities and benefits of a commercial insurance pooling option.

To find out how your school can benefit from working with HUB International Insurance Services, contact:

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