

# Strategic Use of Consultants: An Interactive Guide for Head Start and Early Head Start Leaders



EARLY HEAD START  
National Resource Center

## Voices from the Field

### Strengthening Fiscal Operations and Family Partnership Agreements

**Program:**

Gulf Regional Childcare Management Agency, Mobile, AL

**Contact:**

Kym Carroll, Early Head Start Director

**Brief Program Description:**

Gulf Regional Childcare Management Agency (GRCMA) was established in 1992 and is a nonprofit, community partner of the United Way of Southwest Alabama. GRCMA provides child care resource and referral services to families in southwest Alabama, connecting children and families with a range of agency and community services. The agency provides training and educational programs for teachers and caregivers, with a focus on children from birth through age 8. In December 2009, GRCMA was awarded American Recovery and Reinvestment Act (ARRA) funding to establish an Early Head Start (EHS) program. The agency received funding for 104 infants and/or toddlers and pregnant mothers in four child care centers in Mobile County. GRCMA contracts with the centers to provide EHS services. The centers include Goodwill Easter Seals Child Development Center, Lighthouse Academy, Roger Williams Daycare Center, and Dearborn YMCA Community Center.

**Program Improvement Goal:**

To provide support during the EHS start-up phase to the agency in two distinct areas: (a) strengthening fiscal systems to ensure compliance with federal regulations and (b) ensuring that staff fully implement regulations pertaining to family partnership agreements.

**Training and Technical Assistance (T/TA) Plan:**

As a new EHS grantee, this agency wanted to build its capacity to meet federal requirements pertaining to fiscal management and to expand staff knowledge and competencies in the area of family partnership agreements. The management team developed a T/TA plan that listed these two goals and identified the need to hire

consultants to support the agency in both of these areas. The agency recognized that one consultant would not be able to meet their needs in both of these areas and designed two separate consultant requests.

The first consultant request focused on the need to increase management staff's knowledge of fiscal operations in EHS, particularly around tracking and monitoring the nonfederal share of program costs. The consultant would be required to conduct training for the program director and fiscal manager to increase their understanding of fiscal operations, with an emphasis on nonfederal share and the effective management of carryover funds.

The second request focused on the need to increase staff capacity around family partnership agreements and specified that the consultant

- describe the roles and responsibilities of all parties in establishing a partnership agreement as it relates to services to the entire family;
- review the program's family partnership agreement form and describe how it may be used to plan and deliver services; and
- support staff in completing and implementing a family partnership agreement with each family, including the ongoing monitoring and tracking of family goals.

#### **Consultant Qualifications:**

The program engaged two consultants who could meet the program's needs. The first consultant offered in-depth knowledge of EHS start-up planning and implementation, management systems, and fiscal operations. The second consultant had expertise in services to families.

#### **Consultants' Work:**

The consultants provided their services and support via phone conferences and electronic communications. The consultant with expertise in EHS start-up planning and fiscal operations performed the following tasks:

- Provided suggestions and resources related to in-kind contributions, including information about available services that are partially state funded, and provided training on tracking and documenting in-kind contributions
- Developed systems for each EHS program center to track its nonfederal share costs as well as its needs for supplies and materials

The consultant with expertise in family services performed these tasks:

- Facilitated discussions on effectively integrating systems across service areas
- Reviewed and updated job descriptions to include attention to the family partnership agreement

- Reviewed service plans and procedures to include specific timelines
- Coordinated with management staff in developing monthly and annual checklists for staff work plans
- Established an annual schedule for ongoing monitoring and mapped the quality assurance monitoring tool to the family services plan

#### **Outcomes:**

- The agency submitted a reapplication for funding that included a detailed description of its anticipated nonfederal share of funds and developed systems for tracking the nonfederal share and the supplies and materials needed across all four EHS program centers.
- The agency updated and completed a “Family Services” document that outlines the agency’s plan to meet Head Start regulations related to family partnership agreements.
- Teachers’ job descriptions were updated to include the expectation for participation in and documentation of the family partnership agreement as well as the understanding that teachers’ participation in the family agreement process could be included in evaluation and discussion during annual performance reviews.

#### **Advice to Others:**

- **Don’t limit yourself to one consultant.** If you can find a consultant with diverse expertise to meet all your needs and provide continuity, that is wonderful. But be cautious of consultants who say they can do everything; those people are rare. It is better sometimes to engage two or more specialized consultants to make sure your program is getting the best services possible.
- **Establish and maintain open communication with your consultants.** Share what works in your program but especially what is not working well. The more the consultants understand how your program is organized and how the service areas are integrated and function together, the more effective the consultation services can be. Communication is critical.
- **Telephone conferences and long-distance consultation can be both effective and efficient.** “Technology is changing how we communicate and function. Our work with the consultants involved no onsite visits; yet program information, policies, procedures, documents, forms, and data were exchanged continuously for four to six weeks.” Time between consultation calls allowed members of the management team to work together to refine and develop policies, procedures, and systems and to receive written feedback and resources from both consultants.

- 
- **Look at the big picture.** This requires “getting out of the weeds” and looking at issues across the program. “Both of the consultants we worked with helped us to broaden our focus and avoid a ‘Band-Aid’ mentality.”