



Creating Clear and Effective Policies and Procedures for Early Childhood Programs



1

Our Goals

- 01** • Learn how to write effective policies and procedures.
- 02** • Prepare to create policies and procedures that best fit your center.
- 03** • Leave the session with understanding of fundamental topics that all early childhood program and policies should address for staff and families.
- 04** • Leave knowing how to create stronger policies for tuition, cultural competence, and health.

2

STRATEGIC GROUP COACHING FOR OWNERS + DIRECTORS
Monthly Strategy Calls + Content

TEAM-BUILDING INTENSIVE WORKSHOPS
Empowering Teams with Tools to Thrive

CONFERENCE + RETREAT KEYNOTE SPEAKING
Motivational Messages that Create Lasting Change



<https://www.facebook.com/groups/communityforecleaders>
BethCannonSpeaks

3



4



“
Policies are policies.
Principles are few.

Policies change.
Principles never do.

~John Maxwell

BethCANNON

5



6



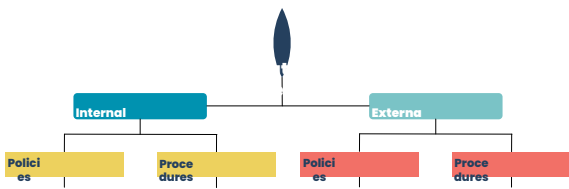
80% of CEOs cited "holding people accountable" as their biggest weakness

“ When done right, enforcing accountability leads to business outcomes and increased confidence for the employees who followed through. ”

Source | CEO Benchmarking Report

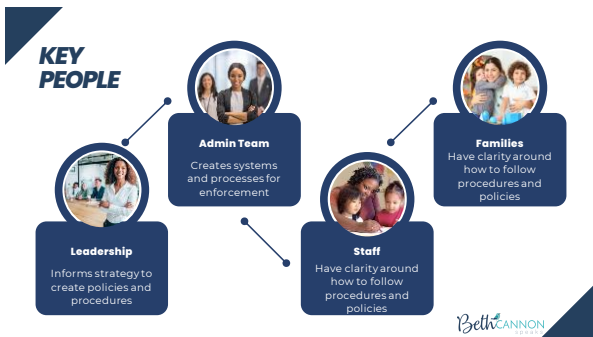


7



BethANNON

8



BethANNON

9



P

Policies

- precise statements containing the set of principles acting as guidelines for achieving goals and aligning behaviors
- serve guidelines to make quick and rational decisions regarding the day-to-day operational activities
- align expectations and help the business run smoothly


P

Procedures

- the sequential steps that direct the people for any activity.
- the methodical sequence in which operations are carried out




10




Policies

- What is to be done
- Who is responsible
- Who is covered or affected
- In what circumstances it applies
- The degree to which the policy is applied
- Definitions of specific terms used penalties for failure to follow the rules



11

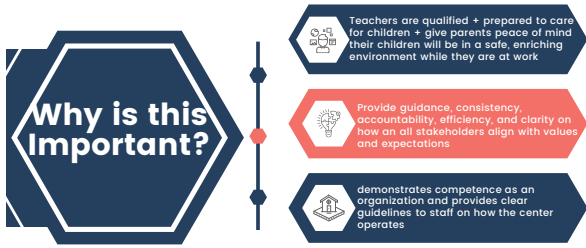


Procedures

- What steps must be taken to implement a certain policy or to achieve a specific goal
- Who is responsible for each step in the process
- When, where, and how each step is to be done
- What verification or follow up is needed
- Where to get additional information or guidance when questions arise
- How to apply penalties for failures to comply



12



BethANNON

13



Does your company have critical processes established and documented so they are repeatable?

- 1**
Have but not documented
- 2**
Some of them
- 3**
All of them

14



C Create

C Communicate

BethANNON

15

You must have a STRATEGY

TO INFORM POLICIES AND PROCEDURES



- 01 **STRATEGY**
 - comprehensive plan, made to accomplish the organizational goals.
- 02 **POLICIES**
 - guiding principle that helps the organization to take logical decisions.
- 03 **PROCEDURES**
 - day-to-day tasks with objectives and a clear order



16



Strategic planning is “a deliberate, disciplined approach to producing fundamental decisions and actions that shape and guide what an organization or collaborative is, what it does, and why.”

Source: Bason

17

Why is Strategic Planning Important for Childcare Centers?

- lay out your center’s goals and explains why they’re important
- helps uncover ways to improve performance
- focuses attention on the crucial issues that threaten culture and stability
- challenges the organization faces and it helps key decision makers figure out what they should do about them



18

The Six Critical Questions



- Why do we exist?
- What do we do? What is it we exist to do?
- How will we behave?
- How will we succeed?
- What's the most important work that we need to achieve: Right now?
- Who does what?




Patrick Lencioni
The Advantage: Why Organizational Health
Trumps Everything Else in Business

19

Make the Connections

Be CLEAR on the CULTURE you are trying to create within the COMMUNITY that you serve so that COMPLIANCE will be less of a CHALLENGE.



- Culture
- Community
- Compliance

Challenge

20

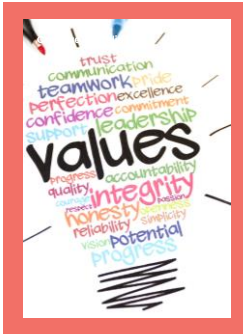


CULTURE

"Your culture is a combination of what you create and what you allow."

-Craig Groeschel

21



STRATEGY

**REALIGN
YOUR TEAM**
with your
vision + Values

BethCANNON

22



23

STRATEGY

Communicating Policies

Be clear on how you will communicate expectations AND enforce compliance.



24



25



26



27

Your Brain Dump Strategy

1. POST-ITS: Grab a stack of Post-it notes (feel free to mix and match with sizes and colors) and a sharpie to write with.
2. SPREAD OUT: Find a wall where you can really spread out with your Post-its.
3. BREAK OUT EACH CATEGORY: Culture - Connection - Compensation - Compliance - Curriculum
4. BRAINSTORM EACH CATEGORY: Next, brainstorm YOUR POLICIES that will go under each CATEGORY.
5. DEFINE OUTCOMES: Once you decide on your modules and lessons, it's time to identify an outcome for each module.



© 2021 Beth Cannon Speaks

31

Bad Way to Explain Policy + Procedure

TOPIC: Waitlist

● Policy

A waitlist will be formed when full enrollment has been reached in the daycare.

● Procedure

1. The number of children in the daycare is governed by the Community Care Licensing Regulations.
2. Children of Young Parents returning to school to continue their education are accepted and if a space is not available the last child into the daycare will be given 2 weeks' notice of losing their space.
3. Children are accepted into the daycare on a first come basis

*Beth*CANNON SPEAKS

32

Good Way to Explain Policy + Procedure

TOPIC: Waitlist

● Policy

A waitlist will be formed when full enrollment has been reached in the daycare.

● Procedure

- Create a card in Trello Board "Waitlist" under the classroom name.
- Add Name, DOB, Parent Name, and Contact.
- When an opening for the daycare occurs, the Team Leader will contact the parents or guardians of the first child on the waiting list by telephone.

bethcannonspeaks.com/trello

33



34

CREATING POLICIES + PROCEDURES FOR YOUR FAMILIES ENROLLED IN YOUR CHILDCARE CENTER

- Admission
- Hours
- Payments
- Vacation/Time Off
- Philosophies + Pedagogy
- Activities/Curriculum
- Celebrations
- Belongings
- Behavior Guidance
- Health Policies
- Emergencies
- Meals/Allergies
- Termination



35



FAMILIES

FAMILY ENGAGEMENT FEATURES + FUNCTIONALITY

Communicate and engage with parents and families

- Share daily activities, videos, photos and newsletters with parents
- Use the child care mobile app for easy, two-way communication
- Keep parents engaged with calendars to promote upcoming events

Complete documents online with our eDocuments feature

- Create, format, digitally sign and store important documents all in one place
- Send and manage all sorts of documents online, such as enrollment contracts, incident reports and permission slips
- Remind parents and staff by email to review and digitally sign documents – no need to download, print or sign by pen

Quickly and easily process digital tuition payments

- Ensure timely payments to your centers
- Added convenience for the parents
- No more hand written checks or delays at drop-off



36



Tuition Policy Ideas

- Tuition is paid through the parent portal prior to every Monday of week of care.
- Only online payments will be accepted.
- Tuition is due regardless of attendance.
- A delinquency fee is charged in the amount of \$25 per day.
- Late pick-up fee (\$2-5 per minute)
- Tuition consists of 10 hours per day for private pay students.

Things to Consider

- Closing for sickness
- Acceptance of subsidy
- Refunds
- Family vacation to hold a spot (limit weeks per year)
- Family discounts
- Holiday Closings and Staff Development Days



37



Health Policy Ideas

- Children who are not immunized may not be accepted for care during an outbreak of a vaccine-preventable disease.
- Medication is accepted only in its original container, labeled with the child's name - and may not be expired.
- Reasonable Accommodations for special needs/ADA compliance.
- Closings /quarantining for classroom illness breakout
- Allergy-free zone
- Noxious/Toxic/Infectious Disease Environmental Exposures

Things to Consider

- Health Records + Immunizations
- Staff Health Policies
- Reducing Obesity Risk in ECE Facilities
- Health Assessments + Records
- Oral Health



38



Cultural Competence Policy Ideas

- Include DEI statement in all internal and external communications
- Our curriculum reflects respect for different cultures, without stereotyping of any culture.
- Staff members try to communicate in the language best understood by the family
- Commitment to recruiting and retaining a diverse teaching staff
- Regular staff training on best practices in DEI
- Create opportunities for family involvement

Things to Consider

- Create a culture of intentionality around increasing their program's level of cultural competence
- Classrooms, materials, curriculum, and interactions reflect value for children's home languages and culture
- Resources that support cultural and linguistic appropriate teaching with children and families from diverse backgrounds are available to new and ongoing staff.



39



“Goals don’t determine success. Systems determine success.”

—James Clear
Atomic Habits



40

STRATEGY

Communicating Procedures

Examine your SOP Structures to find out if you can simplify your processes and amplify your team’s performance and your family’s experience



41

Why is this important?

Any action that will assist in the training of new staff, the improvement of significant processes, and the delivery of improved experiences to your families is LIFE!

When you implement Standard Operating Procedures, you provide yourself and your team with the predictability, dependability, and efficiency they need to be successful and productive.

When there are fewer doubts about how things are done and why they are done, employees perform better at work.



42

What is an

SOP?

"a set Step by Step of instructions, in written or video Format, that describes all the relevant steps and activities of a process or procedure."



Standard Operating Procedure

"how-to" guides for all of your recurring procedures and processes

Beth CANNON

43


Get Your Business Out of Your Brain

Without SOPs, operations stop when those key employees are out.

SOPs guide the organization to understand what needs to happen, when it must be accomplished, who needs to do it, why it's needed, and how should things be done



44



When has NOT having written, documented processes in place been a problem?

45

Standard Operating Procedures

Here's a list of typical SOPs for childcare centers



- Opening • Closing Procedures →
- Staff Onboarding • Offboarding →
- Marketing • Enrolling →
- Cleaning • Daily Checklists →
- Internal • External Communication →

46

How to Get Started Building Your SOPs:



- CONDUCT A RECURRING TASK AUDIT →
- DOCUMENT THE PROCESS →
- CENTRALIZE YOUR SYSTEMS →
- ENSURE ONGOING MAINTENANCE →



47

1 CONDUCT A RECURRING TASK AUDIT



List the recurring processes within your business – you can categorize them into daily, weekly, monthly, quarterly, yearly.

There are 3 key questions to ask when documenting recurring processes:

- What are the tasks that recur in your business?
- Which tasks take up most of your time?
- What is it in your business that you really resent having to do again and again?



48



2

DOCUMENT THE PROCESS

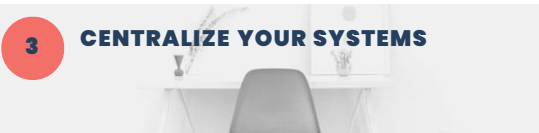
Use the SOP Template provided as the framework for documenting and building out all of these recurring processes.

The key is to embed a systems culture into your business from the moment you take on a new hire.

- This involves a time investment initially, however, it's the most valuable piece of the puzzle when it comes to getting your systems off the ground.



49



3

CENTRALIZE YOUR SYSTEMS

As technology improves, it's strongly recommended to not use a paper binder, but to store your systems digitally in a cloud.

By using cloud storage, your SOPs will be backed up to the server, and both you and your team will be able to access important information and SOPs from anywhere, anytime.



50

WHY CLOUD STORAGE OVER BINDERS

- Sharing information + collaborating with others easily
- Access to documents from everywhere
- Transferring and syncing information across devices
- Extended storage and backup or file archival



51

4 ENSURE ONGOING MAINTENANCE



Each set of SOPs should have a "property owner" assigned to updating when needed.

With rapidly changing technology and learning, regularly updating SOPs is vital to growing and simplifying.

By keeping team members accountable for these processes, you demonstrate your trust in their ability, which in turn makes them feel valued, and will help them work more efficiently.



52

Thank You



LEADERS Lounge
SOLUTIONS

VIRTUAL RETREAT FOR
EXECUTIVE LEADERS + TEAMS
January 13-16, 2023
www.leaderslounge.solutions



Beth CANNON
SPEAKS

BOOK YOUR DISCOVERY CALL
TO FIND OUT HOW I CAN HELP
LEVEL UP YOUR LEADERSHIP
AND YOUR TEAM



STRATEGIC GROUP COACHING FOR OWNERS + DIRECTORS
Monthly Strategy Calls + Content

LEADERSHIP RETREATS + TEAM-BUILDING INTENSIVE WORKSHOPS
Empowering Teams with Tools to Thrive

CONFERENCE + RETREAT KEYNOTE SPEAKING
Motivational Messages that Create Lasting Change

53
