



California Association for Bilingual Education

MEMORANDUM

TO: CABE Board of Directors

FROM: Francisca Sánchez, President

DATE: September 11, 2013

SUBJECT: Board Agenda Item: CABE Professional Development Services Report
PHASE 1 & II RECOMMENDATIONS

Background

As originally conceptualized, CABE PDS was to be rolled out in three phases. Currently, CABE PDS is in Phase II, which was intended to serve as a pilot phase to test three aspects of the Professional Development Services system:

- Fiscal Viability
- Market Interest
- Internal Capacity (CABE's ability to deliver professional development services)

Connection to the CABE COMPASS

CABE PDS is specifically addressed in the CABE COMPASS under *Designing for Success*, Claim 2.2: Professional Development - Provide coherent, comprehensive, and ongoing professional preparation and support programs based on well-defined standards of practice, aligned to CABE's Professional Development Framework, and designed to create professional learning communities and networks of administrators, teachers, and other staff to implement a powerful vision of excellent teaching for each group of English Learners they serve and support English Learner best practices, research, policies, and materials/resources.

This COMPASS claim establishes CABE PDS and calls for launching its three phases to develop and market training and other services that fit with the CABE vision and mission, and to develop aligned supporting products.

Progress to Date

Since March 2013, implementation of PDS has moved forward. The attached chart provides data on our accomplishments thus far, including:

- Types of Professional Development Provided
 - Partnered PD (Example: collaborating with a COE or organization to target a geographic area or need)
 - On-site PD (Examples: a one day stand and deliver PD, a keynote, an ongoing classroom coaching contract)
 - Expert Consulting (Examples: Dual Language Immersion start up, feasibility study, Master Plan Development)
- Location, Title, & Dates of the PD Services Provided
- Number of Participants Served
- Price and Duration of the PD
- Revenue Generated by the PD

- ☐ Costs & Expenses of the PD
- ☐ Profit & Percent Profit Margin

Between July and September 2013, we delivered 8 professional development services, have contracts for providing an additional 6 services, and have secured one PD grant. We also conducted one training in March 2013. This activity has generated \$183,750 in revenue, against a total 2013-2014 budgeted projected revenue of \$245,125, which means that during the first 25% of the year, we have already brought in 75% of the projected revenue upon which we built this year's budget.

During the 2013-2014 year, our revenue generating activity related to CAFE PDS represents a range of return on investment/profit margin for CAFE of 41% to 71%, an excellent return on investment when benchmarked against other organizations similar to CAFE.

Lessons Learned

Fiscal Viability

LESSON #1: Local contexts impact how we determine the most financially beneficial price for our professional development services, and so we should consider those contexts and set our prices according to what the local market can bear so that the highest amount of revenue and return on investment is achieved. Generally speaking, for multiple day trainings, non-consecutive days are more costly and so our profit margin is less than for consecutive day trainings. We should consider this in planning future professional development.

We have experimented with two different price points for the one-day PD sessions--\$195 and \$185. Since both have worked well, the recommendation is that we go with the \$195 price for one-day regional trainings. We have also tried out two price points for 2 and 3 day trainings, based on discussions with county office leaders and informal discussions with district leaders. We conducted two, 2-day trainings at \$395. They were consecutive days and did not require travel expense for the local speaker. Registrations were somewhat low (20 registered for the Elementary session and 25 for the Secondary session) but profitable. We have two counties now offering 3-day sessions at \$375 for the three non-consecutive days. This incurs additional travel expenses for the trainer.

LESSON #2: In part, fiscal success is dependent on our ability to carefully monitor and track expenditures and revenues. We need to continue to support staff in becoming knowledgeable about the tools that allow us to do this and to have access to those tools. We have collaborated to create Excel working tools to help set goals, project revenue, costs and profit, and track our projections. Our first step is to always determine the break-even point so we never lose money on an event or contract. We then project how many registrants we need in order to obtain a 30%, 40%, and 50% margin. In this way we can set our goals, and contain our costs.

LESSON #3: There is a danger in underpricing our services. In education, we all share with colleagues what works and how much is paid for a product or service, and with certain categories of funding, we are bound by most favored nations provisions, so it would be difficult to significantly change our pricing for different areas of the state. We also recognize that often, quality of a service or product is equated with the cost of that service/product, and when services are underpriced, it can generate in potential clients some mistrust about its quality.

Market Interest

LESSON #4: There is considerable interest in a range of professional development topics offered by CAFE, particularly in the areas of California's Common Core and ELD Standards at the

secondary level, and we should capitalize on those areas of most market interest in planning future professional development offerings.

Elementary registrations have been much less robust, perhaps because elementary educators have already received training in this area and feel more prepared. Elementary attendance might also be more impacted by the scheduling of the training on Mondays and Fridays when it's more difficult to secure substitute. Other topics that generated significant interest include:

- ☐ Coaching for teachers on special assignment, coaches, and coordinators (We intend to follow up with contracts to provide onsite coaching/feedback support for those who have attended the training and are practicing observation and feedback.)
- ☐ Shortened versions of administrator trainings
- ☐ Dual language immersion support
- ☐ Special education and ELs

LESSON #5: The CAFE name and legacy is creating interest as we promote and confirm registrations, and this creates an opportunity to maximize and broaden outreach efforts to build membership and conference attendance, as well as to generate support for other CAFE services. For example, as a standard operating procedure, at every PDS event, we:

- ☐ Encourage participants to become CAFE members and to register for the CAFE conference.
- ☐ Share information about upcoming conferences and P2I trainings.
- ☐ Distribute an evaluation that requests participant permission to use their comments in our marketing materials.
- ☐ Conduct a drawing for those who complete the Interest Cards, which helps us generate leads for potential clients, i.e., schools and districts who would like to receive more information about our services and/or be placed on the CAFE PDS listserv, and mailing list.

Internal Capacity (CAFE's ability to deliver professional development services)

LESSON #6: Currently, CAFE must rely on a consultant to direct our professional development services. As CAFE PDS revenues begin to represent a stable, longer-term revenue source, it would be wise to consider incorporating this administrative role within CAFE itself, either through a staff position or some other mechanism. In terms of the actual trainers who provide the professional development services, to date CAFE has been able to contract with expert colleagues. In the future, it will be vital to establish a CAFE-vetted or certified pool of professional developers, as anticipated in the CAFE COMPASS.

LESSON #7: Successful provision of services and revenue generation require a functioning registration, billing, and operations system. CAFE staff have stepped up to the challenge of learning and launching a new system.

The OMS system has been a wonderful asset, allowing us to have people register online, check status regularly, send out email notifications such as parking instructions, what to bring, etc., and to do billing more efficiently. We are all learning how to use its many tools and functions and who on staff takes on each of these functions. We have been able to use the OMS registration tool onsite when several people came to the Orange County events and wanted to register onsite. This reduces paperwork and gives us much more official, complete, legible information for our billing and records.

CAFE's Business Team is handling confirming, billing, and follow-up on payment. Keeping track of and following up on specific client requests and their needs is handled by the CAFE PDS consultant, Elizabeth Jiménez, with support from CAFE staff as needed.

Acknowledgments

Staff

CABE Staff and CEO are to be commended for their considerable efforts to develop, launch, and support CABE PDS. Because of these efforts, implementation of CABE PDS has been able to move forward smoothly and successfully.

Consultant

Elizabeth Jiménez, who is directing the CABE PDS efforts, is also to be commended for her initiative and expertise in assisting to conceptualize and administer the program. Through her careful leadership, CABE PDS is paying significant dividends and providing important learnings that CABE can apply to efforts and initiatives in other areas.

Recommendation

Given the considerable success of CABE PDS, it is recommended that CABE PDS continue to move forward this year, completing Phase II implementation as outlined in the CABE COMPASS.

5.4 CABE PDS UPDATE

REPORT: AS OF SEPTEMBER 11, 2013

- Legend:**
-  **Partnered PD** (i.e. collaborating with a COE or organization to target a geographic area or need)
 -  **On-site PD** (i.e. a one day stand and deliver PD, a keynote, or an ongoing classroom coaching contract)
 -  **Expert Consulting** (examples: Dual Language Immersion start up, feasibility study, Master Plan Development, etc)

Black font—fixed figures

Blue font—Projected/pending figures

Location Title of Institute Dates	# of participants/ maximum possible	Price and duration	Revenue Projected/ Generated	Cost and Expense (Includes presenter fees, travel, handouts, coffee/ lunches for all attendees)	Profit and % Profit Margin
OCDE – ELs and Special Education: Distinguishing Language Development from Disability August 1, 2013	73	\$195 Single day	\$14,235	\$4022.50	\$10,182 71%
OCDE – Elementary Strategies for EL Success under the Rigorous Common Core Standards August 5-6, 2013	20	\$395 Two days	\$7,900	\$4,200	\$3,700 47%
OCDE – Secondary Strategies for EL Success under the Rigorous Common Core Standards August 7-8, 2013	25	\$395 Two days	\$9,875	\$4,350	\$5,525 56%

Location Title of Institute Dates	# of participants/ maximum possible	Price and duration	Revenue Projected/ Generated	Cost and Expense (Includes presenter fees, travel, handouts, coffee/ lunches for all attendees)	Profit and % Profit Margin
GGUSD – Feasibility Study on dual language programs for Vietnamese/English as well as Spanish/English August 20-Oct. 31, 2013	—	Project fee \$18,000 for approx 20 days/2 consultants	\$18,000	\$12,750	\$5,250 29%
MCOE – Recognizing and Refining Great Practice Under the Common Core State Standards – TOSA September 4, 2013	33 registered 40 max	\$185/ 1 day	\$6,280	\$2,945	\$3,335 54%
MCOE – Recognizing and Refining Great Practice Under the Common Core State Standards – Administrators September 5, 2013	35 registered/ 40 max	\$185/ 1 day	\$6,660	\$2,995	\$3,665 54%
MCOE - Secondary Strategies for EL Success under the Rigorous Common Core Standards September 12, 2013	45 registered/ 45 max	\$375/ 3 days	\$16,875	\$9,945	\$6,930 41%
Charter Schools Association – Strategies for EL Success Under the CCSS September 16, 2013	30 reg/ 40 max	\$185/ 1 day	\$5500	\$2525	\$3025 54.5%
YCOE - Secondary Strategies for EL Success under the Rigorous Common Core Standards September 23, 2013	31 Max 70	\$375/ 3 days	\$11,625	8,925	\$2,700 23%
YCOE - Elementary Strategies for EL Success under the Rigorous Common Core Standards September 24, 2013	42 Max 70	\$375/ 3 days	\$15,750	\$9,750	\$6,000 38%
Folsom-Cordova School District – English Learners and the Common Core September 25, 2013	District wide	\$3,300/ 1day	\$3,300	\$2,161	\$1,139 34.5%

Location Title of Institute Dates	# of participants/ maximum possible	Price and duration	Revenue Projected/ Generated	Cost and Expense (Includes presenter fees, travel, handouts, coffee/ lunches for all attendees)	Profit and % Profit Margin
MCOE – Elementary Strategies for EL Success under the Rigorous Common Core Standards November 7, 2013	32 Max 40	\$375/ 3 days	\$12,000	\$9675	\$2325 19.3%
YCOE – TOSAS- Recognizing and Refining Great Practice under the CCSS January 23, 2014	Max. 70	\$185/ 1day			
YCOE – Administrators – Recognizing and Refining Great Practice under the CCSS January 24, 2014	Max. 70	\$185/ 1 day			
SCCOE – English Learners and CCSS EL and SPED March 8, 2014	2 Consultants 2 Conference Sessions ea.	\$4,750 / 1 day	\$4,750	\$3,260	\$1,490 31%
JPMC Grant	2 Schools in LA and Central Valley		\$51,000		
TOTAL			\$183,750 Projected Revenues for 2013- 14 budget \$245,125		