Program to Improve Private Preschool Education (PIPE)

SCALING AFFORDABLE PRIVATE SECTOR PRESCHOOL SOLUTIONS

#PreschoolMatters
Agenda

1. Introducing FSG Inclusive Markets

2. Need and potential opportunity in preschool education

3. Customer research

4. Affordable private school research

5. Service provider research

6. Path forward
We believe that markets can and should benefit the poor and should be part of the portfolio of solutions for social change.

Our strength is in understanding how to make inclusive business models work, and how to get them to scale.

We create impact in various program areas by:
- Driving new thinking for the field, and
- Making change happen on the ground.

We are a “mission driven” and non-profit unit whose work is entirely in the public domain.
An Example of MIM’s Action – Housing
Starting with customers willing to pay and a market failure

Ganesh is a potential low-income house buyer…

- Self-employed Mechanic in Mumbai
- Monthly HH income ~ Rs 11,000, savings Rs 1000 p.m
- Lives in 150 sq. ft. room in slums, Rent Rs 2,400
- Married with 2 children
- Assets – Bank Account, LIC (Rs 1.5L), Refrigerator and PC
- Frequent increases in rent (moved house 5 x in 12 yrs)

…trapped in poor and insecure living conditions.

- Badly constructed, small houses
- Poor sanitary conditions
- Lack of facilities (walkways, schools, etc.)
- Poor social environment for children

Ganesh could afford a 250–350 sq.ft. house, a 20% down payment and pay up to 35% of monthly income in mortgage payments to realize his dream – but the market was not supplying this
Impact: High quality, privately built homes for low income families at INR 4 – 10 lakh

Source: Monitor Deloitte
30k units in 132 projects launched between Jun ’11 – Jan ’13

Ecosystem beginning to work

- Housing supply - ~78,000 low income units launched in India
- Housing Finance
  - 10 HFCs have a portfolio of ~INR 1000 crore micro-mortgages
  - Bulk of the customers have informal incomes of < INR 25000 per month
  - Near zero NPAs for 6 firms
- Government creating conducive policy
  - MoHUPA, with inputs from MIM, recommended policy for states to adopt
  - HUDD, Odisha, with inputs from MIM, formulated conducive policy for low-income housing
  - NHB providing cheap refinance to stimulate the sector
- Our research, based on 4000 interviews, suggests market beginning to address customer needs (e.g. flexible payment plans, smaller houses supplied)

Note: 1 Nagpur includes one project from Amravati
Source: State of the Market Study by Monitor Deloitte
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Without the right conditions in the **first 5 years**, a child’s brain is at risk of being **stunted for life**

- **Stimulation or deprivation** plays a key role in brain development
- **Neural synapses** developed between 2-6 yrs. form the basis for **cognitive** and **emotional functioning** for the **rest of a child’s life**¹
- A good ECE program **stimulates** the development of neural synapses
- Research has shown that **skill begets skill** – early skills increase the capability to acquire skills in the future²

1. **Early Childhood Development**: Unicef; 2. **Skills and Scaffolding**: Brookings Institution; 3. Brain of a Romanian orphan child, cared for by the state under the regime of dictator Nicolae Ceausescu; **Image source**: [First5 Contra Costa](http://www.first5cc.org), Children and Families Commission, California
Skill formation is a dynamic process – skills beget skills – and good ECE programme can play a crucial role.

### Features of quality early stimulation and learning:

**Early Stimulation**
- Speaking to children
- Engaging play
- Positive reinforcement

**Environment**
- Spacious, clean and safe

**Pedagogy**
- Activity-based learning
- Curriculum adapted to local context
- High levels of interaction with teacher

### Critical early skills

#### Cognitive Skills
Stronger analytical skills, problem solving, memory, and early mathematical abilities

#### Language Skills
Greater ability to verbally communicate, read and write

#### Executive Function
Better ability to suppress impulsive behavior, to focus attention and to exercise strong working memory

### Skills required for 21st century jobs

- Social intelligence
- Communication skills
- Leadership and collaboration
- Problem solving, ability to handle large volumes of data
- Understanding of trans-disciplinary concepts
- Ability to learn, unlearn and relearn

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Nobel laureate James Heckman has shown that investment in ECE has much greater impact than later education.

“No levels of later childhood skill investments...can bring [severely disadvantaged] children to a level of social and economic performance attainable from well-targeted early investments”
– James Heckman

1. “The Productivity Argument for Investing in Young Children” – James Heckman and Dimitriy Masterov. (2004); 2. Image source: Department of Children and Youth Affairs, Govt. of Ireland; 3. The Heckman Curve is a stylized representation of the rates of return to investment at different ages; 4. Excerpts from “Interview with James Heckman”, Federal Reserve Bank of Minneapolis.
Quality of ECE currently offered in the market is very poor

<table>
<thead>
<tr>
<th>Pedagogy</th>
<th>Some places do offer “Good ECE” but they are in the minority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rote memorization-based learning</td>
<td>Activity-based learning where the child leads activities and the teacher facilitates the child’s exploration</td>
</tr>
<tr>
<td>Lecture-based model with students as passive listeners</td>
<td>Reinforcing concepts through mediums that leverage different sensory perceptions (e.g., music, painting, games)</td>
</tr>
<tr>
<td>Teaching of writing at an early age when motor skills are not yet sufficiently refined (particularly between the ages of 2-4)</td>
<td>Positive reinforcement through encouragement and compliments</td>
</tr>
<tr>
<td>Negative reinforcement through regular rebukes and punishment</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Context</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Teaching lacks local context and relevance (e.g. “S for Snowman”)</td>
<td>Teaching customized to the local context for the child</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Environment</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cramped</td>
<td>Spacious</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Ratios</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>High child-adult ratios</td>
<td>Low child-adult ratios</td>
</tr>
</tbody>
</table>
Left alone, we do not believe that the market will produce operators offering “Good ECE” at scale and at affordable prices.

*From: “Bad ECE”*

*To: “Good ECE”*
3. Customer research

4. Affordable private school research

5. Service provider research

6. Path forward
Scope of customer research

**Qualitative**
- 108 customers
  - 4 focus groups and 4 in-depth family interviews in each city
- Across 3 cities

**Quantitative**
- 4,299 listing interviews and 2,010 structured interviews
- Across 8 cities (5 cities of over 5 million people and 3 cities with between 1-5 million people)
Key questions answered in our findings

1. What do parents **believe** about early childhood development?

2. What **motivates** parents to send children for ECE?

3. What do parents **consider** to be ‘good’ ECE?

4. What do parents **look for** when selecting an ECE provider?

5. How do parents **gather information** when selecting an ECE provider?

6. What do parents **expect** from their ECE provider and how do they **monitor** the provider, post admission?

7. How are parents and providers **engaging** with each other?

8. Could better educated mothers be **early adopters** of ‘good’ ECE practices?
Most 3-6 year olds in urban India in our target segment are accessing ECE, predominantly from the private sector.

- There are **4.6 million children** aged between 3-6 in our target segment
  - Target segment is defined as households from NCCS classes A3 to D1 in urban cities with population greater than 1 million.

* Data has been weighted by age to account for different number of children from each age group in the sample. Source: FSG primary customer research using 4,179 listing interviews.
### First-mentioned reason when asked why child was being sent for ECE

<table>
<thead>
<tr>
<th>First-mentioned reason</th>
<th>Percentage of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>The child gets used to going to school / staying away from home</td>
<td>26%</td>
</tr>
<tr>
<td>It will improve the child’s future academic prospects</td>
<td>25%</td>
</tr>
<tr>
<td>Herd mentality (Everyone around me sends their child to pre school)</td>
<td>21%</td>
</tr>
<tr>
<td>Child will behave better and get more disciplined</td>
<td>11%</td>
</tr>
<tr>
<td>Child will get admission to grade school</td>
<td>8%</td>
</tr>
<tr>
<td>Child will have the opportunity to make friends, play</td>
<td>4%</td>
</tr>
<tr>
<td>Child will be exposed to better surroundings at school</td>
<td>3%</td>
</tr>
<tr>
<td>Allows parents time to work / do chores</td>
<td>1%</td>
</tr>
<tr>
<td>Other reasons</td>
<td>2%</td>
</tr>
</tbody>
</table>

- The primary motivation for sending children for ECE remains academic across
  - NCCS classes / income brackets
  - Mothers with differing levels of education

Source: FSG primary customer research using 2,010 main interviews. See supporting document for underlying data
What do parents consider to be ‘good’ ECE? (1/4)

‘Good’ ECE is often viewed in purely traditional academic terms

‘Good’ ECE is often thought of as doing grade school earlier
- Learning number and alphabets early on
- Getting into ‘school habits’ like attending everyday, or doing homework regularly

The focus on academic competition and achievement can lead to three strong beliefs about what constitutes ‘good’ ECE:

A Regular homework
B Regular exams
C Tuition classes

“Younger children need tuitions to perform better. Once they are older, they are more able to study by themselves”
-Mother of 3-year-old boy, Rajkot
What do parents consider to be ‘good’ ECE? (2/4)

98% of parents want their children to be given homework everyday
- They typically want homework that allows the child to practice academic skills e.g., repeatedly writing alphabets and numbers

Underlying Drivers
- 60% of respondents feel homework helps reinforce lessons from school*
- 30% of respondents feel homework is important during ECE years as it helps the child get into the habit of doing homework
- 22% of respondents feel homework is important in helping ensure that the child does not ‘waste’ time at home

“Children should be given at least 2-3 pages of homework everyday, or else they will just play around at home.”
- Father of 4-year-old boy, Mumbai

“Homework is important, but in moderation. At this age, the child should also have time to play.”
- Mother of 3-year-old girl, Kolkata

* Multiple responses were permitted for this question. Source: FSG primary customer research using qualitative interviews and 2,010 main interviews. See supporting document for underlying data. Photo: FSG customer research
What do parents consider to be ‘good’ ECE? (3/4)

The market is catering to parents’ demand for homework everyday, even for 2 year old children*

- There is variance by age in the frequency of homework given
  - 84% of 2 year old children* were given homework everyday, compared to 93% of 4 year old children*

- There is no significant variation in this trend by NCCS class / income bracket

* Age at start of the academic year
Source: FSG primary customer research using 2,010 main interviews. See supporting document for underlying data
What do parents **consider** to be ‘good’ ECE? (4/4)

The market is catering to parents’ demand for regular tests, even for 2 year old children

<table>
<thead>
<tr>
<th>Prevalence of regular testing (more than once in 6 months) – by child’s age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age at start of the academic year</td>
</tr>
<tr>
<td>----------------------------------</td>
</tr>
<tr>
<td>Percentage of respondents</td>
</tr>
</tbody>
</table>

- This trend **varies by city**
  - The trend is strongest in Hyderabad (33% get tests every week)
  - And weakest in Delhi (Only 2% get tests every week and 18% either do not get tests, or get them less than once in 6 months)

- There is no significant variation in this trend by NCCS class / income bracket

- Only 23% of respondents reported that the child was being assigned ranks

Source: FSG primary customer research using 2,010 main interviews. See supporting document for underlying data
What do parents **expect** from their ECE provider and how do they **monitor** the provider, post admission?

*Parents are overwhelmingly satisfied with their ECE provider…*

<table>
<thead>
<tr>
<th>Aspect of service</th>
<th>Percentage of respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>School, overall</td>
<td>98%</td>
</tr>
<tr>
<td>Education provided in school</td>
<td>99%</td>
</tr>
<tr>
<td>Facilities in school</td>
<td>96%</td>
</tr>
<tr>
<td>Level of contact maintained</td>
<td>94%</td>
</tr>
<tr>
<td>Quality of teachers</td>
<td>97%</td>
</tr>
<tr>
<td>Child was happy in school</td>
<td>98%</td>
</tr>
</tbody>
</table>

Source: FSG primary research using 2,010 main interviews. See supporting document for underlying data.
The vast majority of low income parents are sending their children for ECE to APSs offering higher grades

**Underlying drivers:**
- ‘Good’ higher schools often accept admission only at the pre-primary level
- Parents do not want to pay admission fees or deal with the hassle of admission process multiple times

**APSs are moving to lower grades due to competitive pressure in local micro market**

Source: FSG primary customer research of 4,179 households in NCCS classes A3-D1
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Scope of research – interviewed 28 school owners, service providers and experts

- 28 schools
  - 28 APS owners
  - 19 ECE teachers
- Across 3 cities
  - Bengaluru
  - Delhi
  - Hyderabad
- Research limited to schools that are
  - Operating on a for-profit basis (i.e., not run by a religious trust etc.)*
  - Providing 2–3 years of ECE
  - Charging all inclusive monthly fees of between INR 700 – 1,500 for the ECE section
  - **Doing well financially**
    - School strength of more than 250 students
    - Increasing or static enrolments
    - Increasing or static student retention
  - **Potential ‘early adopters’** (i.e., have shown some inclination towards improving quality, or have taken loans to make changes / improvements to the school)

* All schools in India are required by law to be registered as trusts, but often operate as for-profit businesses in practice
APSs are private unaided schools with fees under INR 1,500 / month*

* This definition is based on a synthesis of the following reports: "Education Technology in India: Designing Ed-Tech for Affordable Private Schools", by Hila Mehr et al. (2013); "Affordable Private Schools (APS) Sector Analysis Report-2012" by Gray Matters Capital (2012); "Market assessment of Affordable Private Schools in Five Cities", by MSDF (2014)
According to government data (2009), 39% of schools in urban India are APSs

<table>
<thead>
<tr>
<th>Type of Management</th>
<th>Number of Schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Schools in Urban India</td>
<td>210,000</td>
</tr>
<tr>
<td>Government Schools</td>
<td>87,190</td>
</tr>
<tr>
<td>Private Aided Schools</td>
<td>32,145</td>
</tr>
<tr>
<td>Expensive Private Schools</td>
<td>9,067</td>
</tr>
<tr>
<td>Affordable Private Schools</td>
<td>81,599</td>
</tr>
</tbody>
</table>

Nearly 90% of Private Unaided schools in urban India are Affordable Private Schools, while the remaining are high-end.

A typical APS owner is a small businessman looking to differentiate and grow his business

Profile
Name: Kamal Kumar Sharma
Age: 34
Education: Graduate
Years in-charge of school: 6
Prior experience: Owned a real estate brokerage firm

- Has inherited the school which was started by his father
- Divides his time between the school and a real estate business
- Has hired a Principal to take care of most of the day-to-day affairs of the school
- Believes that parents are not interested in quality and only run after big brands and gimmicks
- Feels increasing fees is not easy as the newer schools are happy to undercut fees in attempt to lure parents
- Wants to add a new building to increase his school’s capacity
- Faces challenges with fee collection, and bureaucratic issues due to RTE

Note: Fictional portrait for illustrative purposes only, based on FSG primary research using qualitative interviews
### APS owner’s primary motivation is financial return

<table>
<thead>
<tr>
<th>Financial</th>
<th>Social</th>
<th>Altruistic</th>
</tr>
</thead>
<tbody>
<tr>
<td>APSs are often run as <strong>businesses</strong> (family businesses in many cases). Most owners see APSs as a source of <strong>livelihood</strong>. Decisions about the school are therefore analyzed on the basis of their <strong>impact on costs and revenues</strong>. Some owners may believe that improving <strong>quality could lead to better financials</strong> in the long-term.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>APS owners enjoy a certain <strong>standing within the local community</strong>. Being seen as providing ‘quality’ or ‘caring about students’ can enhance this standing, and may drive some decisions made by the owner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Some owners may be committed to <strong>improving the quality of education for its own sake</strong>. Decisions to invest in certain aspects may therefore be driven by an ‘altruistic’ motivation to improve quality</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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“I cannot introduce anything for which the parents are not willing to pay”

“My schools is well-respected in this community and everyone greets me with respect”

“I noticed that my students were bored in class and wanted to do something to engage them”

© FSG | 29
Running a successful APS is potentially a very profitable business…

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**Illustrative income statement of an APS**
(Indicative calculations based on owner interviews and FSG estimates)

<table>
<thead>
<tr>
<th>Revenues</th>
<th>Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>All numbers in INR unless otherwise stated</strong></td>
<td><strong>All numbers in INR unless otherwise stated</strong></td>
</tr>
<tr>
<td>Average fee per child per month(^1)</td>
<td>Teacher salary per month</td>
</tr>
<tr>
<td>860</td>
<td>126,000</td>
</tr>
<tr>
<td>Number of children in school</td>
<td>Number of teachers in school</td>
</tr>
<tr>
<td>390</td>
<td>18</td>
</tr>
<tr>
<td>ECE years</td>
<td>Average salary per teacher(^3)</td>
</tr>
<tr>
<td>3</td>
<td>7,000</td>
</tr>
<tr>
<td>Highest grade</td>
<td>Staff salary per month</td>
</tr>
<tr>
<td>10</td>
<td>42,500</td>
</tr>
<tr>
<td>Average number of children in each grade</td>
<td>Number of staff</td>
</tr>
<tr>
<td>30</td>
<td>12</td>
</tr>
<tr>
<td><strong>Gross monthly fee revenue</strong></td>
<td>Average salary per staff member(^3)</td>
</tr>
<tr>
<td>335,400</td>
<td>3,542</td>
</tr>
<tr>
<td><strong>Loss due to fee delinquency per month</strong></td>
<td><strong>Power and utility costs(^3)</strong></td>
</tr>
<tr>
<td>(16,770)</td>
<td>20,000</td>
</tr>
<tr>
<td>Delinquency rate</td>
<td><strong>Cost of learning aids(^3)</strong></td>
</tr>
<tr>
<td>5%</td>
<td>10,000</td>
</tr>
<tr>
<td>Net monthly fee revenue</td>
<td><strong>Cost of maintenance(^3)</strong></td>
</tr>
<tr>
<td>318,630</td>
<td>10,000</td>
</tr>
<tr>
<td><strong>Net annual fee revenue</strong></td>
<td><strong>Expenses on marketing(^3)</strong></td>
</tr>
<tr>
<td>3,823,560</td>
<td>10,000</td>
</tr>
<tr>
<td><strong>Total commissions from books and uniforms</strong></td>
<td><strong>Sundry costs(^3)</strong></td>
</tr>
<tr>
<td>307,125</td>
<td>10,000</td>
</tr>
<tr>
<td>Average annual cost of books per child</td>
<td><strong>Total monthly costs</strong></td>
</tr>
<tr>
<td>1500</td>
<td>228,500</td>
</tr>
<tr>
<td>Average annual cost of uniforms per child</td>
<td><strong>Total annual costs</strong></td>
</tr>
<tr>
<td>750</td>
<td>2,742,000</td>
</tr>
<tr>
<td>Margin offered to owner(^2)</td>
<td><strong>Total annual costs (USD)</strong>(^4)**</td>
</tr>
<tr>
<td>35%</td>
<td>42,185</td>
</tr>
<tr>
<td><strong>Net annual revenues</strong></td>
<td><strong>Net annual profit INR 1,388,685 (USD 21,364)</strong>(^4)**</td>
</tr>
<tr>
<td>4,130,685</td>
<td></td>
</tr>
<tr>
<td><strong>Net annual revenues (USD)</strong>(^4)**</td>
<td></td>
</tr>
<tr>
<td>63,549</td>
<td></td>
</tr>
</tbody>
</table>

1. Average fee of APSs in research sample (excluding book and uniform costs)
2. Assuming the mid-point of the 30%-40% margin range mentioned by APS owners during research
3. FSG estimates
4. Assuming USD 1 = INR 65

© FSG | 30
They understand that parents judge the school mostly on more ‘superficial’ aspects

Key factors on which APS owners believe parents judge schools

- **English language**
  - Conducting classes in English medium
    - Considered a minimum requirement
    - Also emerged during FSG’s customer research as a key requirement by parents
  - Speaking more English words, either in conversation or as rhymes
  - Writing English alphabets and words, particularly in cursive style

- **10th standard results**
  - Percentage of students that pass the exam
  - Results of the best performing students
  - Results of entrance exam for other schools, in cases where the school itself does not offer 10th standard (e.g., many APSs in Delhi offer classes only till 8th standard)

- **Physical infrastructure of the school** (e.g., well maintained building)

- **Technology-related interventions** (e.g., smart class system, computer lab, SMS alerts)

- ‘Discipline’ and ‘confidence’ exhibited by children, often judged in relation to other children in the locality or building

1. FSG customer research on parent beliefs and behavior regarding early childhood education, 2015
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Transforming APSs would require interventions that are financially rewarding to owners and improve child outcomes.

**Improve child outcomes**
- Improve child development outcomes
- Reduce “bad” or damaging ECE
- Embed a more story or activity based learning approach

**Improve APS financials**
- Improve APS’s brand in the local micro market by appealing to attributes that parents value (e.g. spoken English, Math, confidence) leading to financial gain
- Inexpensive and easy to integrate

*We reviewed ~26 interventions against these dual objectives*
5 standalone interventions and at least 1 SMC\(^1\) to be piloted in AY 2016/17

**Standalone Interventions**

- **Akanksha Foundation:** Art Curriculum
- **Jodo Gyan:** Math-learning Program
- **Jolly Phonics:** English-learning Program
- **Karadi Path:** English-learning program
- **Vikalp:** Math-learning program

**SMC**

- **Hippocampus:** School Management Company

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1. We may pilot more than one SMC in AY 2016/17, as we are still actively pursuing 2 more SMCs
Examples of Jodo Gyan’s teaching and learning materials

Example of an activity using the Jodo Gyan dice
- Teacher asks a child to come forward and roll the dice
- Depending upon the number that comes up, the teacher and student jump together that many number of times
- If the dice shows zero, the teacher and the child do not jump - thus instilling the concept of zero

Source: Pictures taken at the Jodo Gyan resource center, with the permission of the employees
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Theory of change

**Scale providers of commercially viable high-quality* ECE products**

- Provide ECE products that improve quality and have a clear appeal to APSs

 APSs

- Influence parent beliefs about ‘good’ ECE through work in APSs
- Notice benefits of ‘good’ ECE practices and pressure schools to adopt them

 Parents

- Provide better quality ECE in the class
- Provide more developmentally appropriate home-environment

 Child

- Drive adoption amongst other APSs once critical mass is reached

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**Absence of key barriers to scale for product providers**

 A contextually appropriate tool for assessing quality that can be used at scale

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**Greater awareness and interest in ECE amongst all stakeholders**

- Direct impact
- Indirect impact
- Spill-over impact

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* Products that have significant positive developmental impact on the child
Framework to enable scaling of ECE Product Providers: Identify and address ecosystem barriers as they become critical

- Product not adapted for APSs or scaling
- Pitch not adapted to APS owners
- Limited understanding of motivations of APS owners
- Sub-optimal business model (e.g., high acquisition costs)
- Lack of an effective marketing channel
- Lack of high-quality ECE products
- Lack of trained teachers
- Lack of chains of APSs
- Lack of an effective quality assessment tool
- Low awareness and interest about ECE amongst key stakeholders
- Parent demand for 'bad' ECE
- Lack of quality standards
- TBD

Not exhaustive

In scope for phase 2B
How can you engage with FSG?

- Please feel free to download and share our research [www.fsg.org/pipe](http://www.fsg.org/pipe)
- We are hiring!! Visit our careers page [www.fsg.org/careers](http://www.fsg.org/careers)
- Please write to [pipe@fsg.org](mailto:pipe@fsg.org)
  - For volunteering or joining our small group knowledge sharing sessions
  - For connecting us to companies offering early learning products to APSs