

MANAGING PAPERWORK

10 Top Tips

Jodie Clarke

The Empowered Educator

Hi Empowered Ed!

I truly hope you find this resource helpful.



A little about me...

Hi, I'm Jodie! I am a Mum in Australia to 3 girls - twins Ruby & Tara and my adult daughter Ashleigh. And I love the possibilities of early learning!

I'm passionate about helping educators **simplify** their documentation and planning and also enjoy more time engaging with the children in their care through **simple** play based activities & environments.

I enjoy creating blog posts, free tools and easy to use resources and training for educators, leaders and coordinators by drawing upon my 30 years experience in this profession.

I know what support educators really need because I have walked in your shoes. This profession is challenging enough so I aim to simplify not overcomplicate! My resources walk through the basics so you can take action.

The Facts.....

- I hold an Associate Diploma in Education (Child care)
- I hold an Advanced Certificate in Child Care
- I hold a Bachelor of Human Services Degree
- I have worked as an Assistant, Room Leader, Director, FDC Coordinator, IHC Coordinator, OSHC Coordinator, Occasional Care Coordinator, Project Manager, Service Manager, Family Day Care Educator, Presenter and Speaker in the Early Childhood and Community and Family Services fields.
- I have been writing and editing my blog now for over 6 years.
- I am the author of many E- Book resources for educators, A Postnatal Depression Workbook (& DVD) and a picture book for children.
- I have developed and presented webinars and online courses to support early childhood educators in their role.

Thanks for placing your trust in me....

Jodie Clarke

Managing Paperwork & Admin - 10 Top Tips

I'm pretty sure most early years educators would agree with me if I said the administration, planning and documentation requirements of an early childhood educator can seem overwhelming at times and organising daycare paperwork takes a lot of effort! However, I often see educators doubling up on paperwork and documentation because they don't know exactly what they are meant to be recording or why and this leads to extra work as they try to cover all bases and tick off all the boxes to display that magical **'evidence'** that they are meeting outcomes and adhering to best practice expectations.

If you are one of those educators approaching burnout and feeling like you want to give up because of your growing pile of paperwork and overall feeling of always being behind, go grab a cuppa, take a moment for yourself and read through some of my tips for getting back your work mojo and gaining some precious time when it comes to admin.

It's important to your success to first challenge yourself to assess where you are currently at, what's working and what isn't and then make a few changes. You need to develop a system that supports your individual early childhood role, skills and environment. What works for one educator does not always work for everyone but there are a few simple action steps you can take right now that will help you get organised and ready to face the year in control of your paperwork...no matter your role!

Ready to take the challenge, make some changes and get organised ? Use the following strategies in this Simple Series E-book to guide you. Let's do it together!



Managing Paperwork - 10 Top Tips

1. Know What is Expected First

Through knowledge comes the empowerment to seek change and question expectations. Take a look at the planning cycle below, get out a blank piece of paper and write down what forms or sources of paperwork you currently use to document and meet each step.



- Is there a step you find confusing or you don't fully understand why you have been asked to complete a certain template for this step? ASK for clarification or further training and professional development resources. Talk to your educational leader, director, CDO, Coordinator, Mentor for guidance. Read through the [programming articles on this blog](#) for simple guides and explanations.
- If you don't know why you have to write something **find out!** I cannot stress this enough as a timesaver because when you better understand the steps you are taking and why, everything begins to fall in place and you begin to feel more confident that you are covering what you need to without overcompensating and writing more and more.

2. Define Daily, Weekly and Monthly Tasks

Breaking down your huge 'To Do' list into smaller more manageable tasks can help you to feel organised and complete necessary paperwork more efficiently. By forming a system that you work to in a regular timeframe you begin to know exactly what has been done and what is yet to do. No guessing and therefore less chance of overwhelm, confusion and doubling up on admin you have already done.

Managing Paperwork - 10 Top Tips

Think about the actions you could add to a piece of paper split into the three categories.

What do you need to get done everyday? Every week? Every month to feel in control of your planning and programming?

A few tasks to check off and take action on at regular intervals seems a whole lot more achievable than that huge list of jobs I know you have hiding in the back of your diary or folder right now!

For a daily organisation guide think about the following questions to help you get started creating your own checklist of tasks or reminders. You just want to create something that helps you feel organised each day, a tool like this also helps you to recognise and document the actions you have taken.

- Have you completed any observations via jottings, notes, audio, video or photos taken briefly for a child and/or group today? Who?
- What do you need for today's indoor environment, activities & materials setup? Is environment ready, safety check done?
- What do you need for today's outdoor environment, activities & materials setup? Is environment ready, safety check done?
- What creative and craft materials still need to be prepped or made ready for use? What will be used tomorrow?
- Have you recorded spontaneous and significant open ended play on a current program plan or diary at end of the day?
- Did you note any family and/or staff feedback in diary or on plan?
- Have parent and carer daily communication tools/methods been completed and emailed or printed?
- Have the planned activities with a daily focus child/children been completed?

Obviously every educator will have slightly different tasks to list but when it comes to documentation finding a way to check off some of the basics each day allows you to set aside time for more in depth tasks for the end of a week or month. The questions above should help to get you started. Then you can begin to also identify tasks for weekly and monthly guides.

Managing Paperwork - 10 Top Tips

3. Collate and store documentation sources systematically.

Before doing anything else, stop and ask yourself if right this minute you had to show evidence of a child's individual learning journey while in your care – would you know where to find all the pieces of the paperwork puzzle?

Finding bits and pieces of paper to inform your forward planning each week and summative assessments (assessments of learning) throughout the year can take up a lot of precious time.

Decide how you are going to store all documentation sources for individual children and stick with a system you know.

- Is it in a separate folder for each in a filing cabinet?
- Is it all on the computer?
- Is it in drawers or a cabinet?

Observations, the analysis of learning from the observation, the subsequent forward planning including possible extensions and the program all need to **tie together and show a story of the journey or distance travelled so far by a child** and how you have supported and guided this journey through your work. So it makes sense to keep everything together doesn't it?

The image displays three overlapping educational planning tools on a wooden background. The top tool is the 'Forward Planning Tool', which is a table with columns for Child Name, Observation Type & Date, Analysis of learning, Future planning, Follow up, and Planned Activity. The middle tool is the 'Observations & Analysis Tool', which contains a list of questions to consider and a table for recording observations. The bottom tool is the 'Observation Notes/Jottings' tool, which provides a space for recording observations and reflections.

Child Name	Observation Type & Date	Analysis of learning	Future planning	Follow up	Planned Activity

Questions to consider...	Tick if applicable
Did you look for and record only moments that stood out to you for some reason? A moment that surprised you?	<input type="checkbox"/>
Is the observation authentic and what you actually saw take place (not your interpretation)?	<input type="checkbox"/>
Is the observation a moment that suits the situation, the time you had to observe and also the child's needs?	<input type="checkbox"/>
Did you use audio tools/apps to record moments quickly and save you the moment?	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

Observation Notes/Jottings		

Managing Paperwork - 10 Top Tips

I like to use an **organisational tool** that lists all of my documentation sources and where I can find them at any time. It tells me when that source was last updated or perhaps that I am behind in some areas. I have included a printable of this tool in my **Summative Assessments Toolkit** that you might find a useful resource.



Whatever system you use whether filing cabinet or computer or a box on a shelf....make sure to clearly label and update often so you know exactly where to find something when you need it. It only takes a few minutes to write or type out a few labels but it saves so much time in the long run!



Managing Paperwork - 10 Top Tips

4. Rethink and Save Time with Child Observations.

Decide on the form, tool or template you want to use and then **modify as you need to**. You don't have to stick to the one style – use what works best for you, there is no 'rule' about what method you need to use to observe.

Not all observations need to be written out. **Consider using tools** such as audio, video, images, digital apps, tablets and others.

Again, if you don't understand the form or system you have been asked to use, **seek clarification and support** because when you are confused and unsure this quickly leads to resentment and overwhelm.

- Try using sticky notes or a tablet notepad to **jot a few points or conversations down** then come back to write up at a later time. You can also use photos and video in this way – they will record the story for you to come back and document formally when you have planning time or the children have rest time.
- If you work in a daycare centre with a number of educators in the same room **keep it simple by hanging a clipboard with paper or an exercise book** for educators to add observation jottings or moments of significance. The idea is not to waste a whole lot of time writing out a rough observation outline then having to come back later and waste time rewriting everything again! Just stick to notes or photos to jog your memory.
- Use the **language of the EYLF** or the guidelines for your region to explain the story and learning and do away with the need to look up and link to outcome numbers or use complicated colour codes all the time. This also helps you gain a **better understanding of the outcomes** and what you are aiming for overall.
- **Keep them short, keep them meaningful** because this saves you time when you have to analyse the learning and forward plan in the next steps. Don't fall into the trap of documenting everything or writing an observation because you 'have to get one for this child before end of the week'. Not a good use of your time and not helpful for the child either.

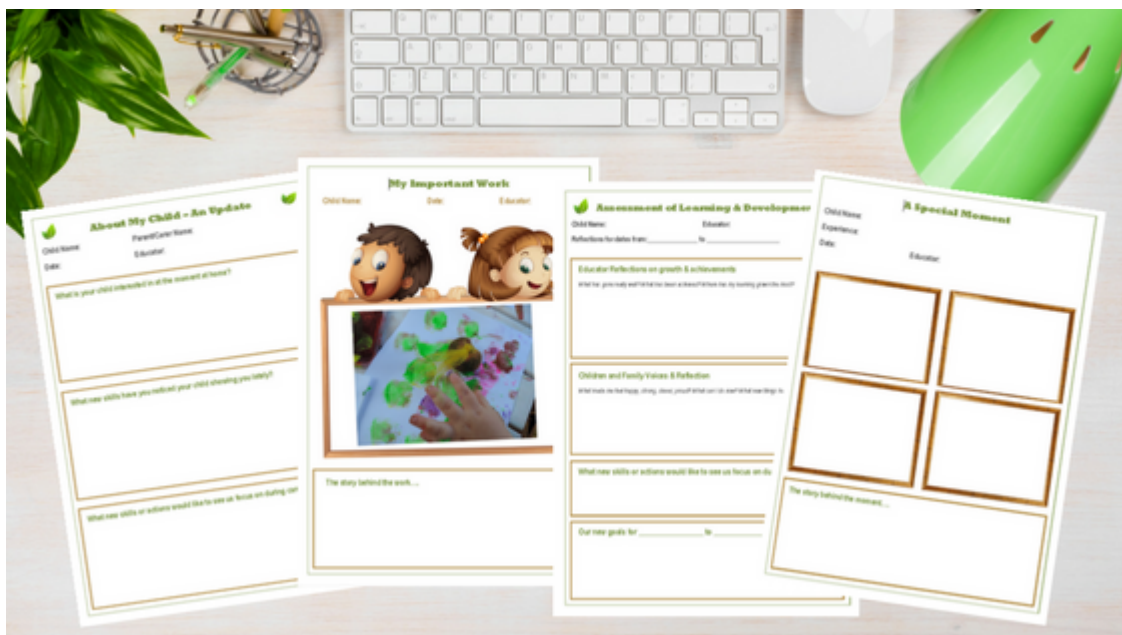
Managing Paperwork - 10 Top Tips

5. Define why and how you use Portfolios or Learning Journals (before spending all your time on them!)

You might use a **portfolio** but remember that portfolios compiled with the intention to reflect a child's learning journey (and meet documentation requirements) are not just a collection of artwork and stories. Consider **how you will use your portfolios or learning journals** to document the whole child, their voice and the progress made on their journey so far.

Read through this post on portfolios to ensure you aren't doubling up on paperwork (or missing something vital you thought you had covered) if you do use portfolios.

Consider using your computer and a few simple folders to create your own digital or paperless portfolio – no apps or complicated online systems to master and you can set it up the way that works for you and therefore ultimately saves you time. You can **view a video with my tips for setting up a digital portfolio on your computer here**.



Managing Paperwork - 10 Top Tips

6. Keep Reflection Simple

This step in your daycare paperwork cycle shouldn't be complicated or time consuming. Choose whether you want to do daily or weekly and then stick with it so you know you can show evidence of regular reflection and that you have used it to guide your programming and work practice.

- Use sticky notes to add dot points about what worked, what didn't, something you want to remember for future planning, why you would or wouldn't do a certain activity again, possible changes needed to the environment, interests or spontaneous play that evolves. Stick them into a exercise book or folder at the end of each day and by the end of the week you have notes to guide your plan for the following week or month.
- Jot notes directly onto a space on your displayed program or turn over and write on the back at the end of the week. Perhaps use a diary but keep your reflections short and to the point, they are meant to be useful!
- Keep in mind that as educators we reflect on our own everyday practice and program but we also analyse and reflect upon the children's learning and development. Decide on a system for each method.

The image displays three sample forms used for reflection and planning in a daycare setting, laid out on a wooden surface.

- Weekly Reflections:** A form with a header "Weekly Reflections" and a sub-header "For Week Ending: []". It contains two main sections: "What worked this week? Why? What could I do again? What did the children's voices tell me?" and "Possible ideas for next week".
- Our Day Today:** A form with a header "Our Day Today" and a sub-header "Children's Voices & Special Moments". It contains a large text area for "What learning evolved today through activities & play?" and a smaller section for "Children's Voices & Special Moments".
- Meetings & Professional Development:** A form with a header "Meetings & Professional Development" and a sub-header "What did I do?". It contains a table with columns for "Course/Meeting", "Date Attended", "Hours Completed", "Organisation/Trainer", and "Follow up actions required".

Managing Paperwork - 10 Top Tips

7. Keep Program Planning Simple

- Use the style, template, system or form that suits you best – **that you understand and know you can work with** and complete easily.
- Include spaces for parent/family input, spontaneous experiences, reflections and individual focus child activities on your program and **simply add information throughout the week.**
- Ensure whatever system you use encompasses **all areas of the framework or outcomes you are working to.** I like to include interest area headings in each of my program template boxes that I know reflect a broad range of activities and experiences that lead to the learning outcomes. If I plan at least something for each of those areas and write it in I know without a doubt I am providing a well rounded program that works toward meeting a range of outcomes for the group each week. I can add more as I go or reflect on why I chose not to go ahead with a planned activity.
- Don't try and **plan for everything all of the time.** Some weeks the focus might be **stronger on some outcomes than others** but this allows you to really explore and extend upon this area of learning rather than becoming overwhelmed trying to tick everything off before the end of the week. Often the children will lead you in a different direction as they manage and direct their own play. Just add a few quick notes to your program or diary to record this, **no need to totally rewrite your original program!**
- If you have difficulty thinking of activities each week and feel frustrated trying to fill in a program then **just add a few activities to start with then as the week progresses add in spontaneous activities and child led experiences to your plan each day.** This still shows a record of ongoing learning and planning. If you work with other educators in a room it also offers an opportunity for them to take part in the planning and add to it as the week progresses.

The image displays two program planning forms side-by-side on a wooden background.

Our Program - Educator Focus Form

From to

Encouraging Identity & Independence Spontaneous Moments & Children's Interests Intentional Teaching Focus

Empowered Educator Program Learning Areas

How do they correspond to the EYLF outcomes?

Empowered Educator Learning Area	EYLF Outcomes
Let's Get Moving	Children have a strong sense of identity Children have a strong sense of wellbeing Children are confident & competent learners Children are effective communicators
Creative & Sensory Play	Children are connected with & contribute to their world Children are confident & competent learners Children are effective communicators
Encouraging Identity & Independence	Children have a strong sense of identity Children have a strong sense of wellbeing Children are confident & competent learners Children are effective communicators
Connecting through Communication	Children have a strong sense of identity Children are confident & competent learners Children are effective communicators
Fine Motor/Manipulative	Children have a strong sense of wellbeing Children are confident & competent learners Children are effective communicators
Inviting our Imagination In	Children have a strong sense of identity Children have a strong sense of wellbeing Children are confident & competent learners Children are effective communicators
Exploring our World	Children are connected with & contribute to their world Children are confident & competent learners

Our Program Activities & Experiences

From to

Exploring Our World Inviting our Imagination In Let's Get Moving

EYLF Easy Guide - Breaking it Down

LEARNING OUTCOME 2
Children are connected with & contribute to their world

What Activities & Experiences might help educators plan for this outcome and learning area?

- Dramatic Play - dress-ups, role play, puppets, costumes, and life sized doll-houses, group and social play
- Outdoor Play - obstacle courses, sand & mud play, gross motor, gardening, water play, natural materials, nature houses & projects, using recycled materials, fort and cubby building, environmental awareness projects, watering plants, look after animals
- Cooking - food preparation, choosing up, where food comes from, how it comes to table and in grocery
- Craft and Sensory Activities - Inclusion of natural materials, recycled materials, watering plants, building dolls, nature tables, collage
- Language & Communication - Music, movement, story and language activities incorporating community and cultural information, morning meetings, sharing & chat times, reflections
- Conventions and Block Play - Lining game play, position calling & investigations, working together, constructing environments, turn-taking, sharing, run & trade

Your Ideas...

Managing Paperwork - 10 Top Tips

- I like to keep a folder with blank program templates in it on my sign in desk and if I think of activities or extension opportunities I want to include next week I just **write them straight onto the blank plan and sometimes my program for the following week is already half completed** before I sit down to write it out.

8. General Administration

Educators tend to spend a lot of money on resources and toys for the children in their care – especially family daycare educators! Before a new financial year begins think about putting a method in place that will save you precious time and money when it comes to preparing a tax return.




I must admit to being terrible at this step and every year it causes me a lot of stress because I have to waste a week trying to find receipts, put them in order and enter them into my files or computer accounting system. Every year I swear I will either spend less money (and therefore have less receipts at end of the year...genius right?) or put a system in place of entering the information regularly so its there ready at tax time.


Managing Paperwork - 10 Top Tips

- I have a folder with plastic sleeves and dividers listing the months of the year. **Receipts each month go into the corresponding folder section**
- I **scan the receipt before filing** and save in a file on my computer (one for each month) store these files in a dropbox folder in the cloud so I know I won't lose them but on your home computer is fine as long as you back up regularly.
- If I receive a receipt via email I simply save it straight to the **corresponding monthly folder in dropbox** – no need to waste time printing.
- If you want to go a further step you can then take a little time at the end of each month to **add your expenses to an online accounting system** like Quickbooks online or your own computer software like Harmony or an excel spreadsheet perhaps.


Did You Know?




You do not have to link your observations or planning to quotes from theorists




The number of observations you need to complete each week is dependent on individual child needs and educator judgements - there is NO magic number!



You can choose the observation method you are most comfortable with - there is no requirement to use a format you don't like.



You don't actually have to complete time consuming portfolios to meet standards and current expectations

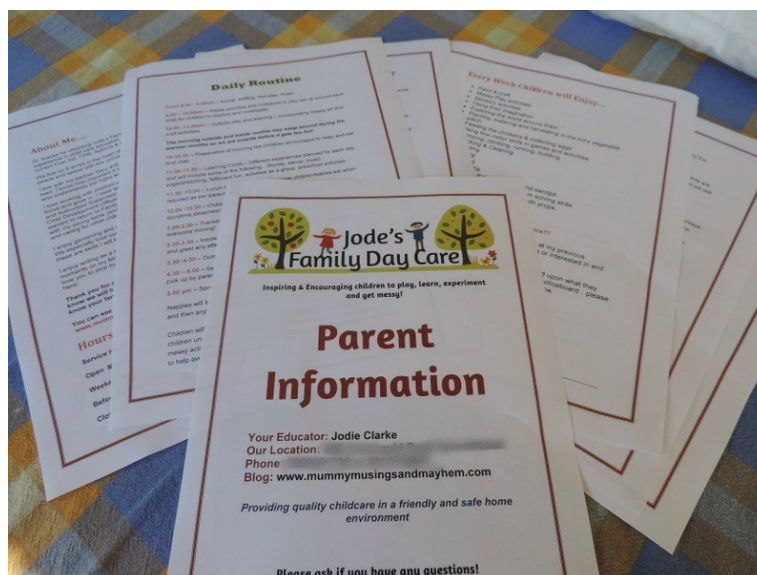


There is no requirement that states you need to write the number of a learning outcome on your program

Managing Paperwork - 10 Top Tips

9. Business daycare paperwork for Home Educators

- **Label folders** in the filing cabinet so you know where to find the forms when you need them.
- **Keep separate** to the children's documentation paperwork so there is no confusion.
- Keep copies of all forms used regularly in a **'master's file on the computer ready to print out or already printed in a folder** divided up into relevant sections. So when you need that excursion, risk assessment, accident etc form you can get your hands on one immediately. When working on your own there often isn't the time to leave children to go print a copy out.
- Keep 2 or 3 parent handbooks, enrolment or information kits **printed and compiled ready to hand out to prospective new families** so they immediately see a professional and organised service and educator. I have also kept a PDF copy of the parent information pack to email to parents who request information. This saves time and printing costs as you simply attach the file to an email as needed.
- Keep a **file stocked with advertising and promotional tools** for your family day care so promotion is an ongoing strategy rather than something you only do at the end of the year when it is often too late to secure new bookings.
- **Type and save a couple of letter templates you can easily edit** when needed such as late fee reminders, fee rises, bring to care reminders, toilet training, healthy lunchboxes, healthy and sickness policy etc...those you often use.
- **Do not allow families to get more than 2 weeks behind in their fees.** Act immediately with an assertive letter, be clear about the amount owing and the next steps if they do not pay (For me this was no care available until fees paid). Tough but saves time you don't have to waste on chasing people up!



Managing Paperwork - 10 Top Tips

10. Organise Computer Files and Folders

If you are someone who likes to use the computer to organise your daycare paperwork and general administration keep the following tips in mind.

- Label your folders in a way **that makes sense to you** and that you know you can find again easily.
- **Keep a 'master copy' folder** that contains all the important forms you need to run your service and team. Do not enter information on these forms.
- When working on documents and typing in information always keep originals to the master copy folder, **open then 'save as' the form you are using**. Rename to something relevant and save to a different folder.
- Consider naming a folder for each child in care to keep details like immunisation, contact details, communication along with folders for observations, parent communication, programs, newsletters, parent notes, professional development resources etc so you **always know where to find what you need quickly**.



I know it seems like a lot but that's just because I have tried to break it down into smaller steps under each area for you. This is certainly not meant to make you feel even more overwhelmed though so right now take out a piece of paper and **choose 3 areas from those above that you could work on organising** – forget the others for now...just take small steps and then take a few more once you have those sorted.

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Jodie Clarke

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