



**OECOSL RFP 23-73841 – Child Care
Information Management Software Initiative
Attachment B – Technical Proposal**

Respondent: DSSV, Inc. dba, brightwheel

Instructions:

Request for Proposal (RFP) 23-73841 is a solicitation by the State of Indiana in which organizations are invited to compete for a place on the State's Preferred Vendor List for Child Care Information Management System (CCIMS) services in a formal evaluation process. Please be aware that the evaluation of your organization's proposal will be completed by a team of State of Indiana employees and your organization's score will be reflective of that evaluation. The evaluation of a proposal is based upon the information provided by the Respondent in its proposal submission. Therefore, a competitive proposal will thoroughly answer the questions listed. The Respondent is expected to provide the complete details of its proposed operations and processes for the scope of work detailed in the RFP document and supplemental attachments. To help facilitate the decision-making process, the requested information should include both product functionality and the system's current or future ability to exchange specific data with the State system.

Please review the requirements in Attachment K – Scope of Work carefully. Please describe your relevant experience and explain how you propose to perform the work. For all areas in which subcontractors will be performing a portion of the work, clearly describe their roles and responsibilities, related qualifications and experience, and how you will maintain oversight of the subcontractors' activities.

Please use the yellow shaded fields to indicate your answers to the following questions. The yellow fields will automatically expand to accommodate content. Every attempt should be made to preserve the original format of this form. Additionally, a completed Attachment L - Functions and Service Components is required as part of your completed Technical Proposal. **A completed Technical Proposal is a requirement for proposal submission. Failure to complete and submit this form may impact your proposal's responsiveness.** As part of the completed Technical Proposal, diagrams, certificates, graphics, and other exhibits should be referenced within the relevant answer field and included as legible attachments.

1. Company Background and Experience

a. Describe your experience providing Child Care Information Management Systems (CCIMS) for other states or similar clients.

i. Please describe your presence in Indiana, if applicable.

b. Please describe your experience working with different provider types or networks (e.g., licensed child care center provider, licensed child care home provider, unlicensed registered child care ministry provider, CCDF legally licensed exempt providers).

Brightwheel launched in June 2015 as the first all-in-one solution for early education, custom-built on modern technology and cloud infrastructure. Our founder, Dave Vasen, has focused his career on education, bringing high tech online learning to underprivileged communities through his work at Cisco, leading strategic projects for Teach for America and launching K-12 Education for Amazon Kindle. Today, brightwheel is the #1 rated and fastest growing child care company in early education, serving providers of all sizes and pedagogies across all 50 states. At the core of our work is our deep commitment to the educators and families that we serve.

Brightwheel supports approximately ~30,000 child care programs serving over 3 million+ children and families. This consists of around ~12,000 home based and ~18,000 center based programs. This number represents all types, sizes, and demographics including Head Starts, School Districts, YMCAs, large enterprise groups, Boys and Girls Clubs, independent centers, home based programs and more.

In Indiana alone, approximately ~700 early childhood programs supporting over +77,000 families are actively using brightwheel today. The program types include home based, center based, Head Start, school districts, after school programs, ministry providers, Catholic Schools and YMCA's. The enhanced usability of the brightwheel platform allows it to seamlessly support a wide range of customer needs including license exempt providers. In addition, brightwheel has a free platform that is utilized by many licensed exempt providers across the country. Through this partnership, we can support license exempt programs in upgrading their account to premium and training them on new features that can benefit their small business.

Brightwheel also has existing partnerships with three shared service alliances in Indiana: Geminus Regional Care Group, Community Foundation of Wabash County and enFocus (Marshall County). Through these alliance partnerships, we are supporting a number of home and center based programs across Indiana. We are also providing these alliances with critical data and insight to support the programs they serve.

Lastly, brightwheel has over 40 customers that are similar to the Office of Early Childhood and Out of School Learning. These customers include non-profits, shared service alliances, child care resource and referral agencies and state organizations.

Below are three examples with a similar Scope of Work to this Request for Proposal:

- **State of Iowa:** In partnership with the Department of Management, brightwheel is providing Child Care Management Software to 1000 child care programs across the State of Iowa. These represent both in home and center based programs. We have also built a custom API integration into KinderTrack (their state subsidy system) and are in the process of scoping the project to build an operational data store.
- **State of Louisiana:** In partnership with the Department of Education, brightwheel is providing access to our child care management software to programs throughout the state. We also built an integration that is compatible with their state subsidy system, KinderSystems.
- **Oklahoma CCR&R:** As a part of our existing partnership in Oklahoma, we are providing access to our full suite of technology and services to over 500 child care providers across the state. We are supporting local government agencies in identifying and recruiting providers to adopt our technology. We also deliver coaching and implementation services to local organizations like Child Care Resources & Referral agencies. As we continue to watch the usage grow across the state, we are working together to develop streamlined data for reporting on provider adoption rates, product usage and attendance. This project is funded by the Oklahoma Department of Health and Human services.

2. Core Functions and Services

a. Describe how your proposed operations meet or exceed the core function and service requirements as described in Section 3.2. For each subsection listed below, please fill out the associated Table 1: Core Functions and Services included in Attachment L. In the yellow field below, please enter a supplementary narrative explaining your responses to the associated table in Attachment L. If any of your offerings differ by provider type, please describe the differences. Please describe any difference in services between child care providers and multi-site networks, if applicable (e.g., ability to perform services for all sites with one account, ability to conduct key functionalities by site or across all sites, etc.). For the following items, be sure to address the specific questions as part of your function-by-function description.

- i. Enrollment Support
- ii. Attendance Tracking
 1. Please describe your fraud prevention functions.
- iii. Billing and Invoicing
- iv. Parent Communication
 1. Please describe how your solution keeps communications with parents secure. Please also describe what capabilities are available to change the point of contact, as needed.
- v. Reporting Dashboards
- vi. Document Management
- vii. Child Portfolio
- viii. Mobile Solution

b. Please describe the interfaces that make your platform user friendly for child care providers, networks, and families. Be sure to include information on how the platform streamlines administrative work for child care provider networks that operate multiple sites (e.g., ability to access all sites with one account, ability to view key information by site or selected site groupings, ability to update network information across all sites).

1. Enrollment Support

Brightwheel provides enrollment support within the platform through our comprehensive enrollment and admissions functionality. With these tools, programs are able to more easily understand how many open spaces they have and how to utilize the features to proactively fill their openings.

Marketing & Lead Generation

Brightwheel has a lead capture tool that allows programs to create a live link and sync it with a website, facebook page or other online tools. This allows admins to capture any and all enrollment information about potential families that are interested in their program. Providers have the opportunity to customize these forms and select which fields they want interested families to complete.

Once a parent completes this form expressing interest, the information will automatically populate on the programs admissions dashboard. From there, we have several customizable options for filtering and sorting prospective students. Providers can use these filters to display a narrowed-down student list, or leave the filters blank to display all students, regardless of current enrollment status. In addition, providers can use filters to find and message students with specific statuses, interested in certain programs (before/after school), within a specific age range, or within a range of desired start dates.

In addition, providers can grant prospective parents access to edit a student profile. Once toggled on, parents are able to update and add enrollment information for their child's profile. Also once the child becomes enrolled they can update things like approved pickups and immunization information, etc. This feature saves administrators a lot of time.

Administrators and teachers that have been granted access (we have various roles for security reasons) are able to view and change their enrollment information from any place anytime. Brightwheel has a wide range of reports that are pre-populated within the platform. At any time, programs can pull a report that gives them a comprehensive understanding of their enrollment.

Some examples of these reports include:

- **Full-Time Equivalent:** The Full-Time Equivalent (FTE) report is the measure of a program's true enrollment taking into account schedules that are full-time, part-time,

and half-day. This report gives administrators better insight into their program's true enrollment allowing them to optimize enrollment and staff scheduling.

- **Daily Attendance Summary Report:** The Daily Attendance Summary Report allows admins to easily pull a report for attendance based on room and status during any 32-day date range to see the number of students in attendance during that time.

STUDENTS SCHEDULED THIS WEEK

Daily students count	0	0	0	3	3	3	0
FTE test 1				FTE test 9:00am-1:00pm	FTE test 9:00am-1:00pm	FTE test 9:00am-1:00pm	
FTE test 2				FTE test 9:00am-2:00pm	FTE test 9:00am-2:00pm	FTE test 9:00am-2:00pm	
FTE test 3				FTE test 7:00am-5:00pm	FTE test 7:00am-5:00pm	FTE test 7:00am-5:00pm	

Daily attendance summary

Full Time Equivalent

What days is your program open? *

✓ Monday

✓ Tuesday

✓ Wednesday

✓ Thursday

✓ Friday

Saturday

Sunday

Ratio

What is the maximum "Full Time" hours per day? *

8 x hours

Room check

Student reports

Cadence *

Start Date *

End Date *

Create Report

Export Report

Billing reports

Daily

01/06/2022

01/11/2022

Staff reports

Other reports

Room	01/06/2022	01/07/2022	01/10/2022	01/11/2022
Demo Room	0	0	0	0
FTE test	2.13	2.13	2.13	0
Graduated	0	0	1	0
Incoming Students	0	0	0	0
Infant Room	7	8	7	0

2. Attendance Tracking

Brightwheel provides a secure and configurable check-in experience for families. Families have multiple options for how they are able to check-in their children via mobile device and tablet.

Below you will find a more in depth overview of the different check-in features. Brightwheel believes that flexibility and security are the most essential components of any platform; therefore, we are always prioritizing the most secure way to fit the needs of all types of programs and families that we support.

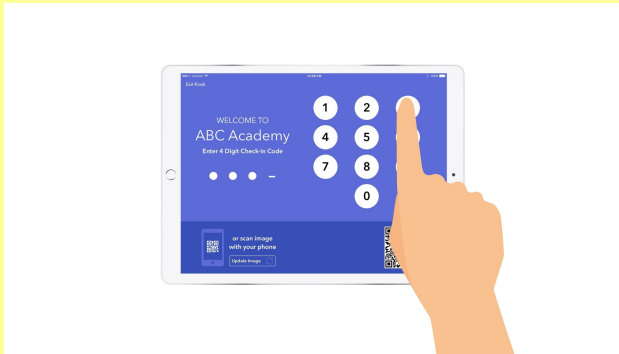
Check-in Summary

The brightwheel Kiosk and attendance feature offer a digital sign-in experience that tracks the time and date of a student's drop off and pick up, the user who signed them in/out, and additional security through a check-in code and digital signatures. The Kiosk is an easier and more secure sign-in process when compared to pen and paper. Also, QuickScan is an added benefit to promote a touchless sign-in experience.

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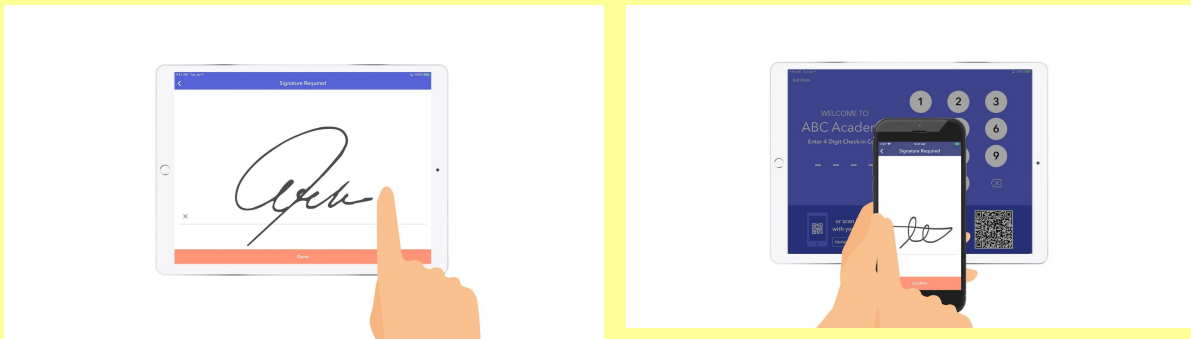
Check-in Kiosk

The check-in Kiosk is an incredibly versatile tool that can be adjusted to fit the needs of the program. Every user with a brightwheel account has a check-in code assigned to them upon the account's creation. This check-in code will timestamp and record who signed the child in each day.



Digital Signatures

Programs can enable digital signatures as a way to increase the security of the program's check-in experience. Enabling this option on the check-in settings page will require a student's contact to sign on the screen of the device being used to check in the student. In addition, an attendance report can be generated with these signatures to help meet licensing requirements.

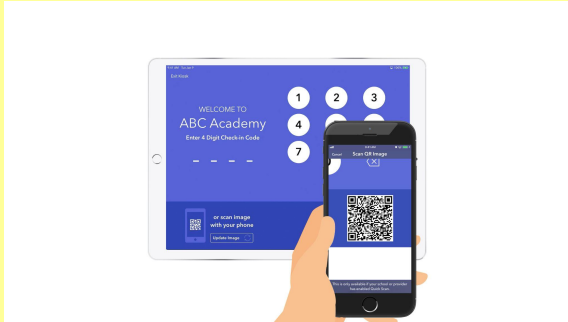


Quick Scan

The Quick Scan feature allows student contacts with Parent or Approved Pickup permissions, to check their student in/out through their personal devices. When QuickScan is enabled, the person checking in the student can scan the QR-Image and complete the check-in process.

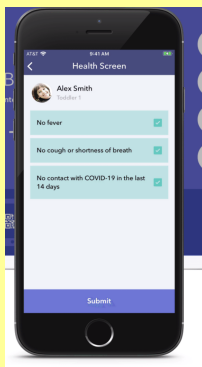
In addition, toggling on the Quick Scan Refresh setting forces the app to generate a new QR code every three hours. Some programs choose to enable this to increase security. If touchless sign-in is "toggled on" for a family member or approved pick-up this **MUST** be done on-site. This is **critical to fraud prevention** and ensuring our tool is protecting providers, teachers and families.

The only feature families are allowed to complete at home is the health screen allowing parent-level contacts to submit a health screen questionnaire. This enables administrators to review and accept this information prior to the student check-in or arrival to the program.



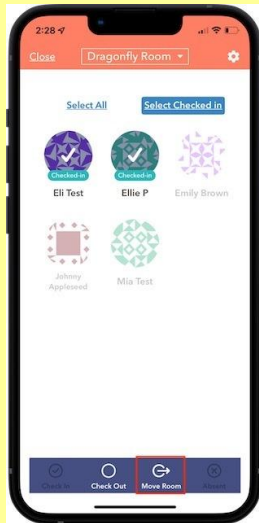
Health Screen

Brightwheel's Health Screen option allows administrators to implement a customizable questionnaire that can be required of staff and/or students upon check-in. The Check-in Health Screening can be used in conjunction with brightwheel's Check-in Kiosk and Quick Scan features to minimize the touching of communal surfaces. These practices help administrators maintain a safe and healthy environment for students and staff members.









Attendance Mode

Brightwheel's Attendance feature allows you to internally track the whereabouts of each student throughout the day, in addition to checking staff in and out. Admins, Managers, Lead Staff, and Staff members can check students in and out, move them to different rooms that the student is assigned to, or mark them absent.



With the use of brightwheel's attendance features, programs are then able to pull attendance reports including all of the information they collected for licensing. Please see below.

STUDENT	ROOM	CHECK-IN	SIGNED IN BY	CHECK-OUT	SIGNED OUT BY	TOTAL HRS
Alonzo Jackson	Pre-K	06/01/2020 07:11am	 Jess Jackson	06/01/2020 09:18am	 Jess Jackson	02:07:39
Kyle Jackson	After School	06/01/2020 07:11am	 Jess Jackson	06/01/2020 09:18am	 Jess Jackson	02:07:39
Eva Charles	Toddlers	06/01/2020 07:11am	 Natalia Charles	06/01/2020 07:12am	 Mike Charles	00:00:47

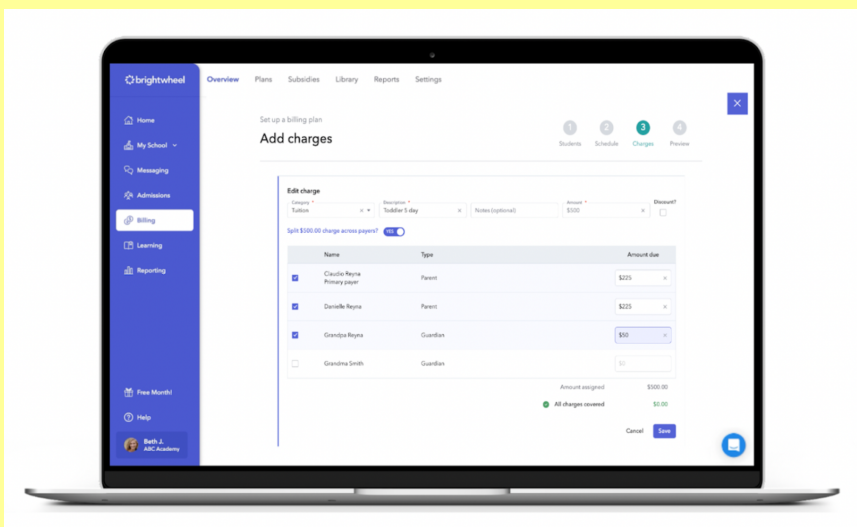
3. Billing and Invoicing

The brightwheel billing platform was designed specifically for early education making it the most robust and flexible billing platform on the market. Our billing software helps individual early childhood programs save hours every week by automating their billing with ease.

With brightwheel billing, administrators are able to create custom billing plans for all students and easily make adjustments and updates. Providers have the flexibility to schedule recurring automatic invoices or select one-time charges for tuition, meal fees or late fees. These charges can be created and added to a billing plan for each individual student or all students at once.

This billing plan then automatically creates and sends electronic billing statements to parents based on their unique billing interval (ex. daily, weekly, monthly). From there, a parent receives their billing statement and is prompted to pay directly through brightwheel via credit cards, debit cards or ACH. The funds are deposited directly into the program's bank account **the next business day**. This is a major differentiating factor for brightwheel because with other CCMS systems it can take up to 7-10 days for payment to hit the provider's account. The speed of payment is critical to increase adoption of the tool given the small margins in early childhood businesses.

In addition, brightwheel allows programs to add multiple payers for each account. We know that not all students' invoices are paid by a single-payer. Sometimes families want to split invoices across multiple payers, or students may have an alternate funding source that pays for their childcare costs. You can edit how invoices are split across payers by editing the charges on a student's billing plan. If you split charges, the payers will all receive notifications of charges based on the portion that they're responsible for. The ability to split payments on a single invoice is a major differentiating factor for brightwheel.



The system will also generate custom reports including, but not limited to, Aging, Billing Transactions and Deposits report. One of the most loved features is that the system automatically creates a tax report for families at the end of the year saving providers hours of time and effort.

Subsidy Management

Brightwheel now offers a brand new subsidy management tool that helps administrators simplify managing their agency payments by giving them a complete picture of agency invoices, balances, and payments within brightwheel billing.

Brightwheel is the only platform that has built subsidy tooling within their greater billing platform allowing programs to see a holistic view of their financial health in one place rather than having two systems for subsidy vs. private pay. As part of this new subsidies feature, we are simplifying and unifying the bill plan flow so that agencies no longer have a separate process. You can now create a billing plan and assign charges in the plan to an agency, much like how charges can be assigned across private payers for a given student. This leads to everything being integrated within brightwheel student profiles, and billing reports. [Linked here is a really helpful 5 minute video of the new tool.](#)

While many programs find brightwheel's online billing tool to be indispensable for saving time, paper, and trips to the bank; programs that prefer not to use online billing can find value in tracking account balances in brightwheel. For example, any payment that is submitted and processed outside of brightwheel can be recorded as an offline payment and applied toward a student's invoice or balance. This is the best way to record payments processed through a third-party tool or any payment submitted outside of brightwheel (ex. Venmo, Zelle, Cash). When recording an offline payment, administrators can opt to send an emailed receipt to parents. From there, the provider is still able to use the brightwheel billing reports to generate a full understanding of the financial health of their program.

If additional integrations with particular third-party billing systems are needed, this is something brightwheel is open to exploring together.

4. Parent Communication

Family communication is one of brightwheel's top priorities. We have created a simple, all-in-one solution to keep communication with families within the brightwheel environment. There are several different ways families, teachers and administrators can communicate with each other including messages, reminders, alerts, announcements and newsletters.

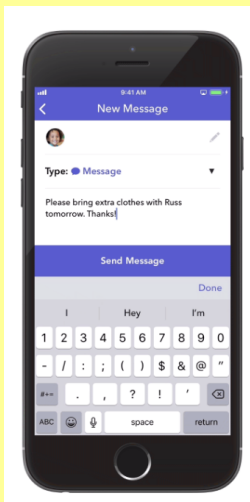
Brightwheel prioritizes security every step of the way. Brightwheel is the only child care management software on the market with two factor authentication making it the most secure communication option.

In addition, brightwheel has implemented various staff permissioning levels with regards to messaging and other features within the platform (see below). This allows for communication to be protected. For example, admins and managers have the option to send a message to individual parents and have the thread be viewable by all staff OR to be only viewable by admins and managers.

- **Staff:** default staff role with no ability to edit student information
- **Lead Staff:** staff role with access to edit student information
- **Manager:** admin role without Billing and Subscription access
- **Admin:** admin role with all access (including Billing and Subscription)

Messages

A simple message is the default when drafting a new message to send to parents. This is easily comparable to a text message or any other instant messaging platform. This is the most commonly used communication type. Administrators are also able to add attachments with their messages to share files.



Reminders

Reminders allow programs to set a date and time that will appear in bold at the beginning of a message to help draw attention. These messages will also show with a bell icon including the set date and time in bold at the beginning of the message.

Alerts

Message alerts enable staff, administrators, and managers to send an SMS text message in addition to an in-app message, these messages will display a megaphone icon. This is a great way to communicate with parents regarding an urgent matter like a school closure.

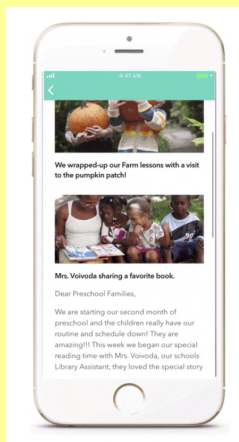


Announcements

Announcements allow administrators and managers to message the entire room(s) at once. The message types will be the same as the ones listed above but with a greater reach. This feature is located in the messaging platform on the web or by choosing message rooms on the mobile app within the administrator dashboard.

Newsletters

Newsletters are a great way to engage and communicate with families in a long-form manner with text and pictures.



Parent Messages

Parent contacts are able to view, respond to, and initiate messages to staff or admins/managers directly. Parents that are trying to message staff assigned to their child's room(s) will have the option to choose from various message types, such as General, Late Drop Off, Late Pick Up, Early Pick Up, and Absent to streamline communication. Choosing any option other than General will bold the subject line to indicate the type of message being received.

Media - Photos & Videos

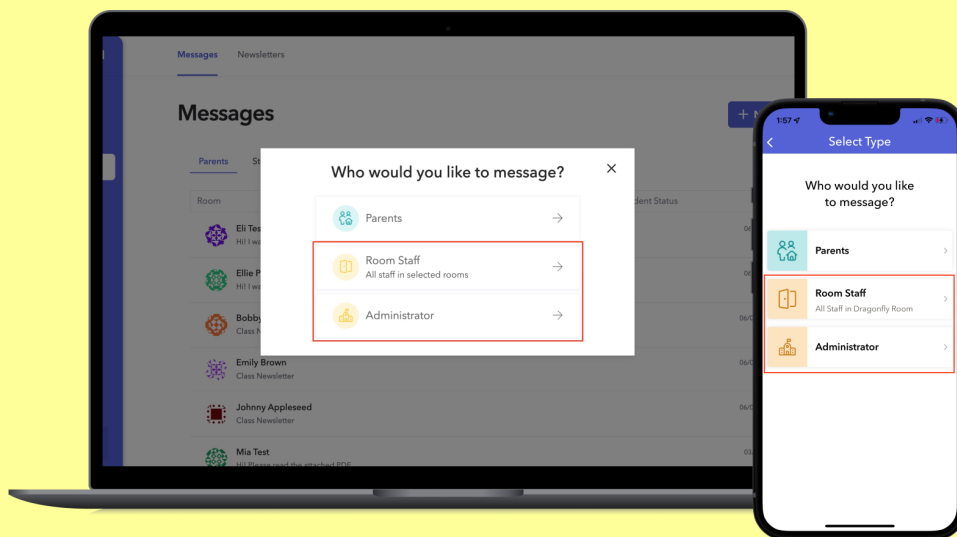
Through the brightwheel application, programs are able to take a picture in-app or upload from a device's gallery and share photos with parents to provide updates on their child's day. Multiple photos can be selected from your device's gallery to upload at one time. Families can use the ❤️ option to like a photo or video posted to their child's feed. In addition, you can record a video in-app or upload it from your device's gallery. Similar to photos, multiple videos can be selected from the device's gallery to upload at one time.

Parent level contacts also have the ability to add a photo of a student to the student's feed using the mobile app. This allows contacts to share photos of activities, projects and milestones that are happening at home. Once the photo is added, it will be viewable by school administrators, staff, and other student contacts.

Additional Messaging Types

Brightwheel messaging was created with flexibility in mind. Through the platform, programs are able to message individual families, multiple families, classrooms and entire programs. In addition, they are able to attach documents and send them via the messaging tool.

Please see an example of the mass messaging options below:



5. Reporting Dashboard

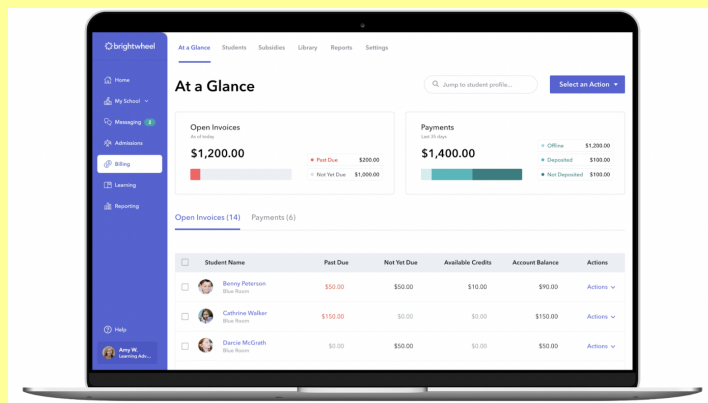
Brightwheel has four main dashboards within the platform. These dashboards include billing, admissions/enrollment, real-time ratios, activities and multi-site reporting.

Billing Dashboard

The billing dashboard provides admins with a snapshot of where their cash flow stands and by flagging accounts that need their attention. There are two main charts at the top of the dashboard:

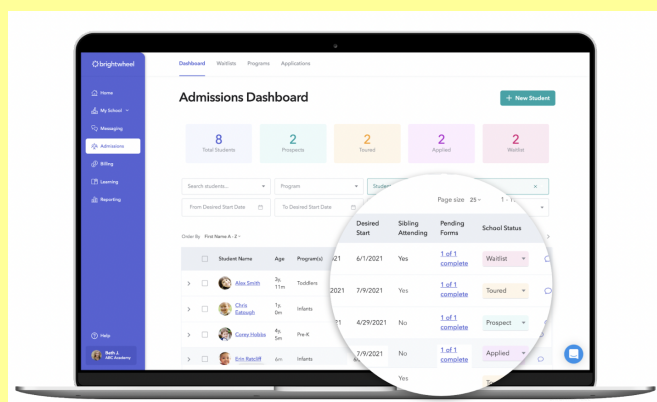
- **Open Invoices as of today:** shows all unpaid, partially paid, and past due invoices as of today
- **Payments in last 35 days:** shows all processed payments, offline (cash, check) or online (paid via ACH or credit card) in the last 35 days

They are also able to easily hop from the dashboard into an individual student's billing plan to learn more.



Admissions/Enrollment Dashboard

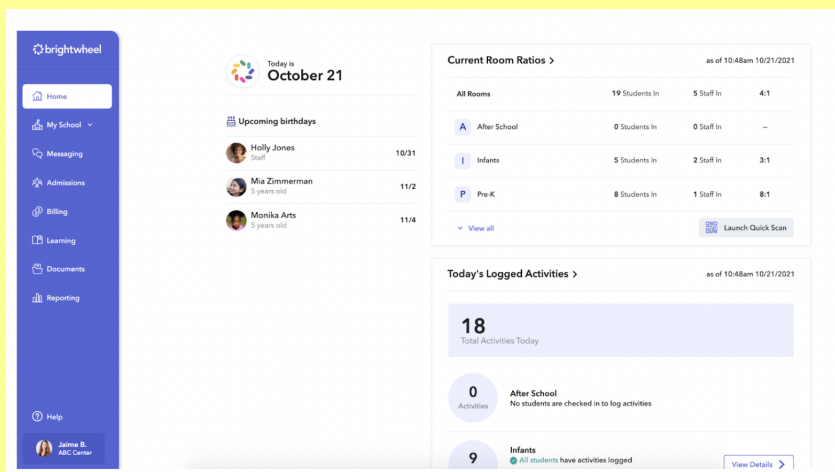
The admissions dashboard allows programs to understand total students, prospects, toured, applied and waitlist. This will help programs understand real-time enrollment and their business pipeline. This is essential in case programs have unexpected enrollments.



Real-Time Ratios and Activities Tracker

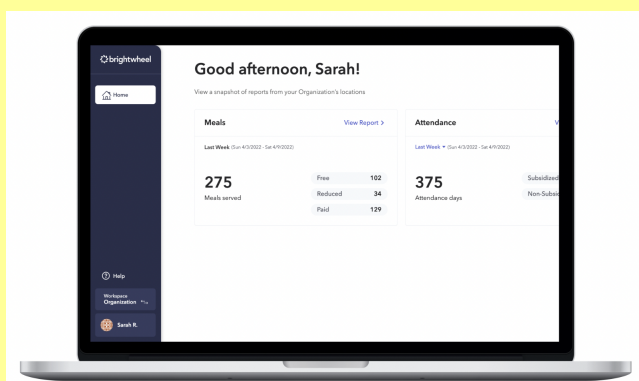
Through this dashboard, admins and managers can quickly view real-time room ratios for all rooms in their program. Programs can also set desired ratios so the system will flag anything out of compliance.

In addition, admins and managers can view a log of all activities that have been tracked that day under Today's Logged Activities. The will display total activities, the room(s) the activities occurred in, and individual labels for the type of Activity. It will also alert programs if there are certain children checked in that haven't had an activity recorded. They can also select, "Click View Details" to be taken to the Activity Report to see a more detailed report of all activities logged in a room that day and use the available filters as needed.



Multi-Site Admin Dashboard

Multi-site organizations can help administrators organize and manage multiple sites by grouping several brightwheel accounts under one organization. When accounts are grouped together, administrators will be able to quickly and easily toggle between locations without needing to maintain different login credentials for each school. In addition, administrators are able to pull reports across multiple locations for data like attendance rates, # of children on the waitlist, etc. It will also create a reporting dashboard of their used reports on their home screen.



6. Document Management

Brightwheel has a wide range of features that allow administrators to document and upload child and staff records.

Activity Logs

There are multiple activities that can be tracked in the mobile app and shared with families.

Some of these include:

- Student observations
- Food
- Nap
- Potty
- Note
- Kudos/Behavior Management
- Medication
- Incident
- Custom: anything we don't have that they want to share!

From there, these logged activities can generate a daily report for each child. With brightwheel, administrators and managers are able to view and send daily reports for individual students. Parent contacts are also able to choose to receive an automated daily email summarizing their child's day. While we don't suggest this method and encourage automation through the platform, programs can also easily print the daily reports at the end of the day, as well.

Health Reports

The top priority for any center is maintaining a safe and healthy space for their students to learn and grow. Brightwheel supports this mission by making it easy to track a student's health, medication, and call attention to allergies.

Health Checks can be used by teachers and staff to track the health of each student upon arrival or use it throughout the day to proactively monitor student health. This allows teachers and staff to log a student's temperature, post a photo, and add notes.

In addition, brightwheel teachers and staff can track the medications prescribed to a student and also log an activity when those medications are administered. If the student should have medication administered at a specific time of the day, Activity Reminders can help to notify teachers and staff when it is time. When a medication is administered to a student, the teacher or staff member can log this as an activity. These activities are shared on the student's feed with the parents, just like any other activity, and can be included in the Activity Report.

Document Hub

Brightwheel also has a unique feature called the document hub. Administrators can upload key documents that can be shared and viewed within brightwheel. This feature enables programs to share important information such as handbooks, menus, or event flyers without spending money on paper or ink. As families join your program, they'll be able to access this pertinent information automatically through the brightwheel mobile app. This means an administrator will no longer have to worry about making sure the right documents are being shared.

Student & Staff Records

Brightwheel has the ability to attach documents to student and staff profiles. This is a great way to store, track, and manage the important files that programs need.

This feature enables administrators to add attachments directly to an individual profile. From there, they can be downloaded, shared with staff, parents, and family, and updated once expired. The most common way this feature is used is for gathering immunization records or other medical forms.




Staff are also able to upload different records needed for licensing like CPR certification and professional development credits. Through the expiring attachments report, programs can also assign an expiration date to these forms so staff know when they need to make changes ensuring they are always in compliance. This attachment report is also commonly used for immunization records.

Reports

Check-inActivityMealAgePayrollAttachmentsDownloads

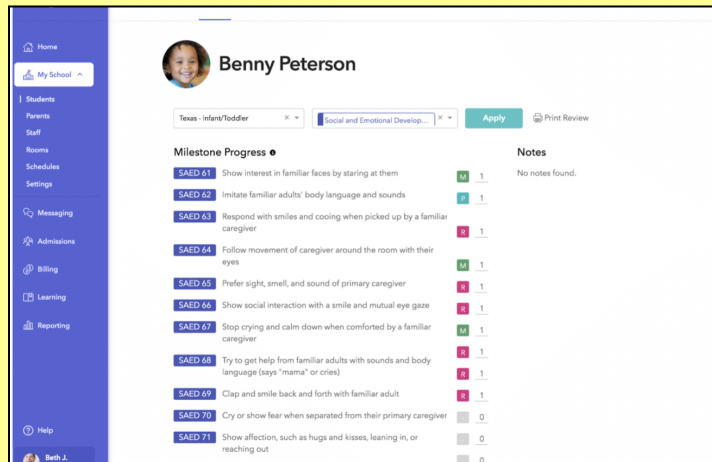
StudentsStaff

CPR Certifi... X03/18/2019 X☒ Show staff missing this attachmentApplyExport

STAFF	TYPE	UPLOADED	EXPIRATION DATE	EXPIRES IN
 Jane Doe	CPR Certification	Missing	-	-
 Demo Teacher	CPR Certification Expired docs will show on the Attachment Report	12/04/2018	12/01/2018	18 days ago
	CPR Certification Expires Soon	12/19/2018	02/15/2019	57 days

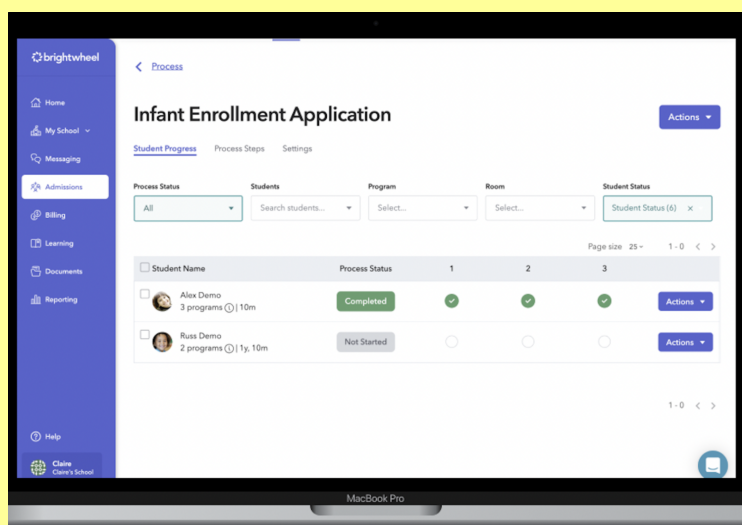
Learning Reports

Brightwheel's comprehensive learning platform is discussed further in the Child Portfolio section. By using brightwheel's observation tracking tool in alignment with Indiana state standards, administrators are able to track an individual child's progress across all domains within a specified framework. From there, a learning report can be downloaded and shared with families for parent teacher conferences or kept internally to monitor child progress.



Admissions Process & Tracker - Licensing, Quality Rating & Professional Development

Brightwheel's Admissions process & tracker functionality helps administrators to easily organize enrollment steps and manage relationships with prospective families. An Admission Process is a collection of forms, contracts, or document requests that can be bundled together in trackable steps. These steps can be shared directly to parent-level contacts in brightwheel, automatically opening up access to all the included forms. Once shared, the students will appear on the process tracker so administrators can easily track families' progress on submitting required paperwork. This is a great tool to ensure programs are collecting all the forms they need for licensing, quality rating and professional development.



There are three different types of steps that can be added to an admissions process including forms, document requests and contracts.

- **Brightwheel Forms:** Brightwheel's Forms feature empowers providers by enabling them to collect key information from both existing and prospective families. Information collected is automatically added to the student's profile (huge time saver) and will create new contacts as needed. Providers can collect and store all form submissions in one place and easily see who's submitted all necessary information and who hasn't. Each form consists of sections of fields that parents will be able to fill out. These fields directly correspond with the fields in the student's profile. Once a section is added to a form, any field can be marked required or deleted by clicking the trash icon. If there is a field you need that we don't prepopulate, custom sections and fields can be added to any form. This is a great way to create student intake forms needed for licensing.

The screenshot displays the Brightwheel Forms interface, which is organized into four main sections on the left sidebar, each corresponding to a step in the form process:

- Address:** Includes fields for Street 1 & 2, City, State, Zip code, and Country.
- Enrollment Information:** Includes fields for Desired Start Date, Billing, Billing Name, and Billing Email.
- Parent/Guardian Information:** Includes fields for First & Last Name, Relationship to Child, Email, Phone, and a dropdown for Relationship to Child.
- Child Information:** Includes fields for First & Last Name, Birthdate, Allergies, Gender, and a dropdown for Gender.

The main content area shows the form steps in progress, with the first step (Address) being the active section. It contains two columns of input fields for Address, City, State, Zip, and Country. The second step (Enrollment Information) shows fields for Desired Start Date, Billing, Billing Name, and Billing Email. The third step (Parent/Guardian Information) shows fields for First & Last Name, Relationship to Child, Email, Phone, and a dropdown for Relationship to Child. The fourth step (Child Information) shows fields for First & Last Name, Birthdate, Allergies, Gender, and a dropdown for Gender. A blue button labeled 'Add parent/guardian' is visible at the bottom of the third step.

- **Document Requests:** Document Requests allow admins and managers to request a document from families. You can also upload a form so families can download, print, and fill it out, then send the completed form back to the program digitally through brightwheel. This allows for easy exchange of documents with families online, which can help programs and families stay organized and reduce the manual overhead of creating, sending, and keeping track of all of their documents. This is another very helpful tool to gather necessary licensing documentation from each family.
- **Contracts:** The vast majority of providers that use brightwheel have at least one form that requires a parent signature. With brightwheel's contract feature any PDF form can be uploaded into the forms & requests tab and sent to parents to sign. This is vital to programs that collect: tuition agreements, photo release forms, medication release forms, or any other program-specific contract.

7. Child Portfolio

Brightwheel has an entire learning management platform that includes an integration with a research-based and state aligned curriculum called Experience Curriculum. Through this feature brightwheel is able to deliver on all components of the child portfolio section and much more. This includes tracking observations, lesson planning, sharing photos and progress, collecting child work and reports for child assessment data.

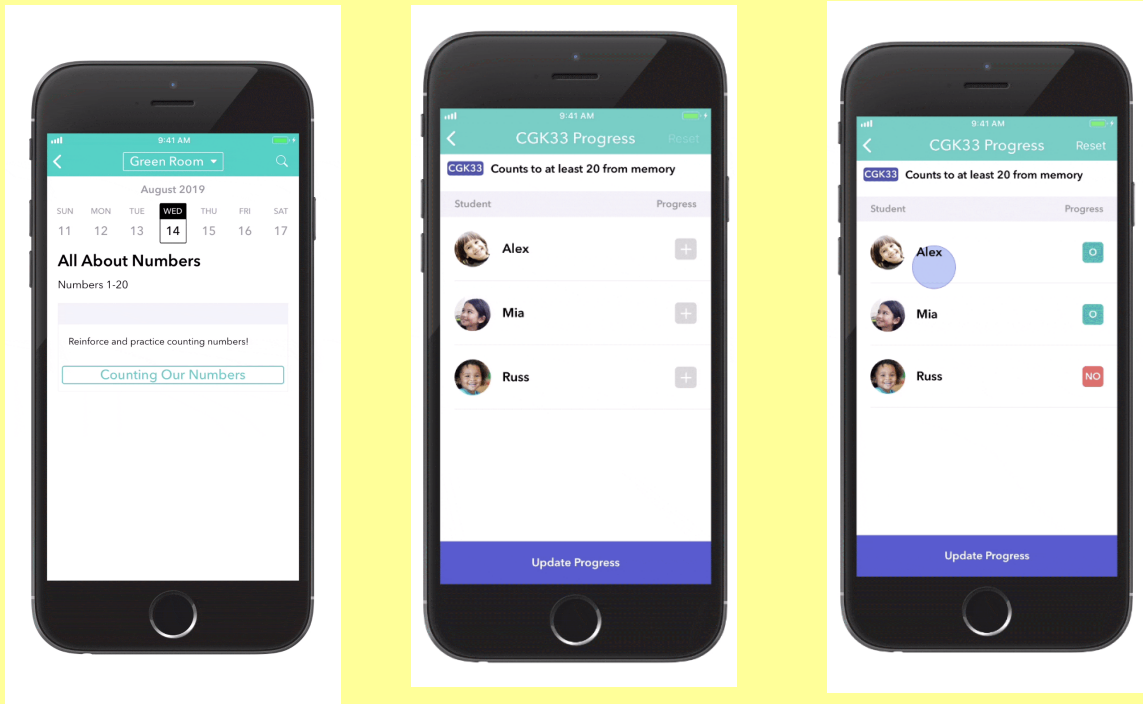
Brightwheel Learning supports embedded observation and documentation of the Experience Curriculum through its authentic assessment features. Educators and families can consistently monitor and track the daily progress of children from infant to Pre-K years as they naturally play and participate in the hands-on curriculum experiences. Educators make this learning visible to families by logging photos, videos, and writing anecdotes and then sharing the moments with families through the app. The brightwheel system automatically adds the related skills for each activity and has a pre-written, customizable family note to help families understand the child's gained skills and educational experience.

To connect school to home learning, educators can create a weekly calendar of home activities for families to enjoy with their children. Educators search, drag and drop content in the brightwheel learning library to build a customized at home learning program. At home activities include access to music, audio books, and hands-on projects that can be implemented with found or natural materials. This weekly calendar is shared directly through the family app where families and schools join together as partners in learning and play.

The screenshot displays the Brightwheel Learning Management Platform interface. On the left is a blue sidebar with navigation options: Home, My School, Messaging, Admissions, Billing, Learning (selected), Documents, Reporting, Free Month!, and Help. The main content area is titled 'Room plans Lesson plan collection Learning activity collection'. Below this, a 'Week 4: "Little" Rhymes' lesson plan is shown, with a note that it is a template. The interface includes filters for 'Room' (Nursery Rhymes) and 'Theme'. A table lists five rhymes: 'Little Boy Blue', 'Little Bo Peep', 'Little Miss Muffet', 'Twinkle, Twinkle, Little Star', and 'Mary Had a Little Lamb'. Each rhyme has a description and a 'Circle Time' section. The 'Circle Time' section for each rhyme shows a grid of activities: 'Little Boy Blue' (Drama, Social Relationships), 'Little Bo Peep' (Communication, Song), 'Little Miss Muffet' (Communication, Game, Self-Awareness), 'Twinkle, Twinkle, Little Star' (Physical Science, Self-Regulation), and 'Mary Had a Little Lamb' (Phonological Awareness, Gross Motor, Social Relationships). Each activity is represented by a card with an icon and a title. The interface also includes buttons for 'Assign to room', 'Filters', 'Add section', 'Show summary', 'Saving', and 'Print'.

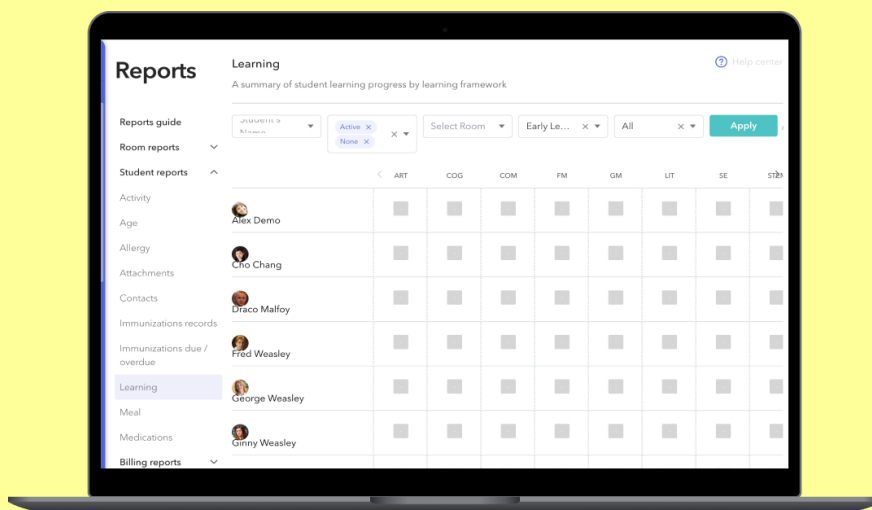
In addition, Brightwheel features a two-way messaging system where families can send photos, feedback and additional information directly to their child's educator while they are learning at home. This allows both families and educators to observe learning progress live with photos, videos and notes to align with learning frameworks.

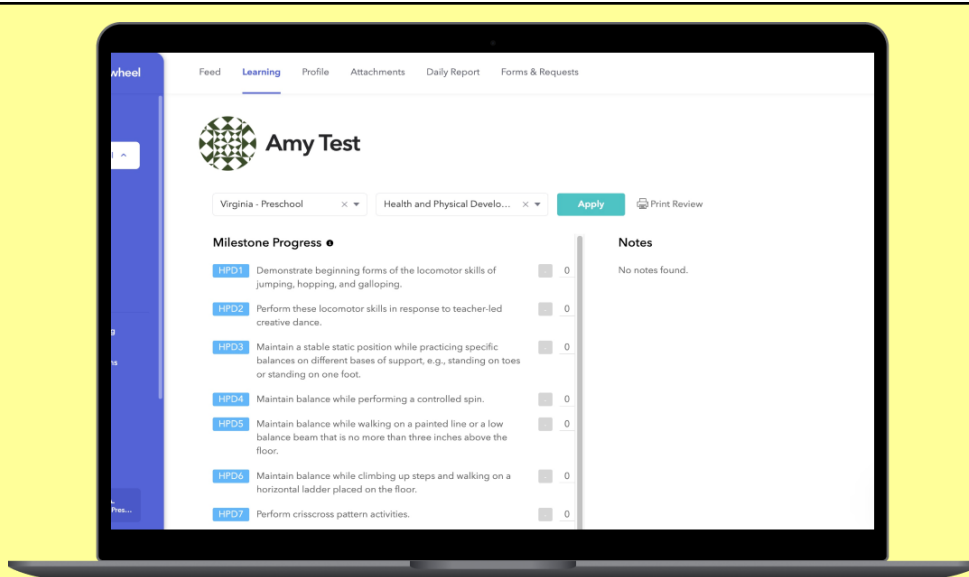
Through brightwheel's observation tool, educators can track milestones in real time and share these with families. In addition, this generates a report for each specific child based on their individual progress. See photo below.



Learning Reports & Data

Through the learning report tool, educators can easily view and export a summary of student learning progress by Indiana state learning standards based on logged observations. This can be pulled on a per child basis or for the entire school/classroom. These reports can be kept internally or shared externally with families.

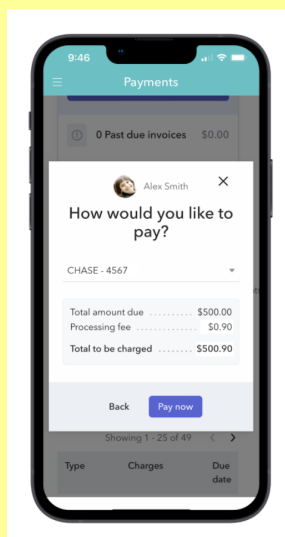




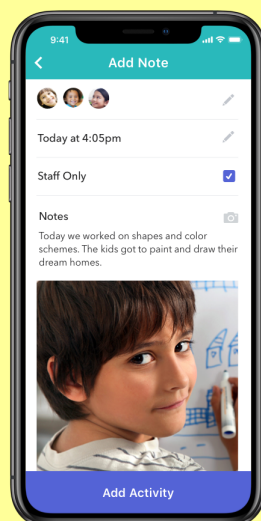
8. Mobile Solution

Brightwheel has a robust mobile app for providers and families. The brightwheel mobile application works with both Android and iOS phones and tablets. In addition, the web-based platform is designed to be easily accessed from a phone, as well. Here are some photo examples of the parent and provider mobile experience.

Parent Application



Provider Application



Brightwheel was built by some of the top UX/UI designers in the technology space. Our team conducted hours of research to ensure each component of the product was designed with our end user in mind. The tool was built alongside early childhood educators allowing us to receive regular feedback and suggestions before any changes are made.

Brightwheel has a full screen flat menu navigation composed of well-defined categories and images. These large icons, bright colors and easily identifiable images allow our users to be able to navigate each feature with ease. The system also has multiple built-in support tools allowing programs to ask questions and receive instruction while navigating through different modules.

Some of our main areas of focus are to: reduce cognitive load, declutter the screen space, follow the thumb rule and ensure there is always a way to ask for help.

A recent survey conducted by our team found that 100% of brightwheel users reported no time lost when implementing brightwheel into their program. In addition, 80% of respondents claimed that it actually quickly saved them between 1 and 5 hours a week. This speaks volumes to the ease of navigation throughout the brightwheel program.

In addition, Brightwheel released a talk to text feature within the mobile application which is loved by providers. This allows them to hit the microphone and talk into the platform while recording updates and messaging families. We understand providers are often balancing multiple tasks at once and aim to make the tool as easy to use as possible.

3. Project Management

a. Overall Approach and Project Methodology

i. Please describe your company's project management approach and methodology for this project. Please include information on anything that would be important for potential child care providers and networks to know when making their decision whether to utilize your CCIMS solution.

b. Implementation

i. Provide an example of a high-level project schedule for a standard implementation. Describe how you create the schedule and the method and frequency of maintaining the schedule throughout the project.

ii. Communication

1. Describe your company's communication strategy with child care providers that select your CCIMS services, both during the implementation phase and on an ongoing basis. Please include a description of roles and responsibilities, status reporting, timing, distribution, etc.

iii. Risk and Issue Management

1. Describe your company's risk / issue management processes.

Overall Approach and Project Methodology

Brightwheel typically follows the Agile Methodology for project management. The Agile methodology allows projects to be less linear and more iterative meeting the needs of changes that may occur throughout the duration of the project. The main principles we try to follow when tracking and evaluating project management include:

- Collaboration
- Data-Driven
- Testing, reassessment and adaptation

In addition, we always ensure that our partners have a clear point of contact for the duration of the experience. While the project plan may shift and change there is always consistency through the Government Account Manager. The Government Account Manager is the primary point of contact for the State, and will be readily available to respond to any questions or concerns regarding your account including, but not limited to, provider locations, data, access, and the platform itself. This individual is also the liaison between various departments throughout brightwheel and the State. Overall, at the core of our work is our deep commitment to the educators and families that we serve and we keep that at the forefront of all projects.

Often when individuals are evaluating software they are focused on specific features and functionality. However, the core of the technology is critical to project success because we want to ensure that the platform is simple and easy to use and there are no bugs or issues. Brightwheel's technology alone differentiates itself from the competitors in this space. Brightwheel has developed a native mobile applications for iOS, Android, and web - built on AWS for in a cloud-based environment. Each application is built from the ground up on fully owned and internally developed source code that is native to each platform (Swift for iOS, and Kotlin for Android). Unlike others in the industry, we do not develop on web (HTML) technology that is then put into a wrapper in order to render a mobile application. Because our applications are native, they are measurably more responsive and more secure.

Implementation

Throughout the contract execution process, the government account manager will be responsible for understanding key milestones and goals of the State and building clear paths to execution. They will take the information they gather and create a plan that will be presented to the State at the start of the contract. This plan should be a reflection of the States' needs aligned with our ability to deliver. As always, we will accept feedback and are open to frequent iterations.

State Partner - Example

Project Schedule: Milestone Dates & Delivery Timelines		
Project Phase & Dates		Deliverables
Project Planning	4/1/23- 5/31/23	<ul style="list-style-type: none"> Confirm milestones & goals Assign and introduce teams Establish unified roadmap Begin State & Local Organization SaaS Training Begin planning for provider recruitment Share brightwheel product information with State team
Pathway to Launch	5/1/2023 - 8/31/23	<ul style="list-style-type: none"> Ramp up provider recruitment <ul style="list-style-type: none"> Host info sessions Release social media Brightwheel call campaign Send direct mail collaterals & more Complete State & Local Organization Trainings Start provider onboarding <ul style="list-style-type: none"> Basics Trainings Billing Trainings Report Generation, etc. Discuss reporting capabilities and begin discussing integration
	<ul style="list-style-type: none"> 5/1/23- 7/31/23: Provider Recruitment 	
	<ul style="list-style-type: none"> 6/30/23 - 8/31/23: Provider/Network Onboarding 6/1/23- 8/31/24: Data Capabilities discussion 	
Rollout & Implementation	6/30/2023 - 12/31/23	<ul style="list-style-type: none"> Continued provider & State staff training: <ul style="list-style-type: none"> Recruitment Account Creating Onboarding Training Integration Scoping Rollout Regular Check-in Cadences with AM Data Integration Milestones & Review <ul style="list-style-type: none"> To be customized once scope is better understood
Post Implementation	Remainder of Contract	<ul style="list-style-type: none"> Regular Check-in Cadences with GAM Continued recruitment & training for newly licensed programs Continued education with new product features Data Integration & Review Transition programs to self-payor

The Government Account Manager tends to suggest a weekly meeting cadence at the beginning of the contract with the chance to increase or decrease depending on the needs of the State. Throughout these conversations, brightwheel will provide direct and open communication on the progress towards each milestone. Brightwheel has a large team that is able to push in to support at any point to ensure we are meeting the deadlines of the State.

Provider - Example from Existing Contract

1

Agency Training - Week 1

This can be done as early as you prefer, with refreshers and additional trainings available at any time throughout the duration of the contract.

2

Provider Account Creation - Week 1-2

Initial providers will have their brightwheel accounts created. They will receive welcome emails and instructions on first steps to setup.

3

Provider Training - Week 2-3

Providers will be assigned an onboarding coach to provide live one-on-one trainings and help them through each step of setup.

4

Add Family Data - Week 3

Providers will be assisted in getting their family data into their brightwheel system as soon as possible to begin usage. We do offer the ability to upload any digital records directly.

5

Start Using brightwheel Daily - Week 4

After family data is in the system, providers will be ready to use brightwheel regularly. They will have ongoing support from our dedicated support team if and when questions arise.

Communication for Providers

Programs starting with brightwheel will be contacted immediately after they express interest in getting started. A sales representative will create their account and get them scheduled for their first training session. While they are waiting for their first session, they can always attend our on-demand sessions. Our onboarding team will contact a provider daily until they complete implementation. From there, the frequency decreases to weekly or monthly cadences. However, at any time they can contact brightwheel directly for support or additional information.

Below is a list of the individuals that will contact providers:

VIP Support Team: offer multi-channel communications, rapid response times, and high customer satisfaction scores.

- Channels: Email, live chat & phone support
- Hours: 8am-5pm CST, Mon-Fri with limited weekend support

Engagement Specialists: provide proactive support to individual providers using brightwheel. Sharing updates on new product releases, training them on features, answering questions and ensuring long term adoption of the tool.

Customer Onboarders: host initial training calls with programs. Set them up with their brightwheel account, help them add students and families and train them on the basics of the tool to get them activated.

Post Implementation Support - The State

The State and supporting local organizations will continue to receive individualized support from their account manager post-implementation. Post-implementation support is typically provided through the following methods: quarterly business reviews, scheduled check-ins, product usage updates and product feature releases. Additional meetings might be scheduled to educate and train the state and local organizations on new and important product releases. Brightwheel is determined to provide as much support as the State and local organizations need to ensure a successful long term partnership.

Individual Providers

Similar to the state, individual users will receive individualized support throughout the duration of their contract. Once the recruitment and onboarding phases are completed, each individual provider will be assigned an engagement specialist. This engagement specialist will regularly and proactively check-in with each individual program. Brightwheel will also provide continuous education on the new product releases to ensure providers feel confident in navigating the tool. We can host these live sessions one-on-one, via webinars and through brightwheel provider boot camps. Providers and families can also always access our support team at any time for immediate support through our live chat feature.

Risk and Issue Management

Brightwheel follows a very standard risk and issue management process.

These steps include:

- Identifying and logging potential issues
- Analyzing priorities
- Establishing a position/perspective
- Developing a response
- Monitoring the issue

At the core of any risk or issue management process is open and direct communication which we strive to have with all of our customers.

Identifying

Any individual that is a part of the State or brightwheel team can flag or identify a potential risk or issue. The Government Account Manager is responsible for the communication and logging of any potential risks or issues with the project.

Analysis

Once the issue is logged, we enter the analysis phase. If a true issue has been raised, the Government Account Manager will start to explore the root of the issue. They will develop a position and recommendation for resolution. They will notify the State when the analysis and response plan are complete.

Establishing a Position

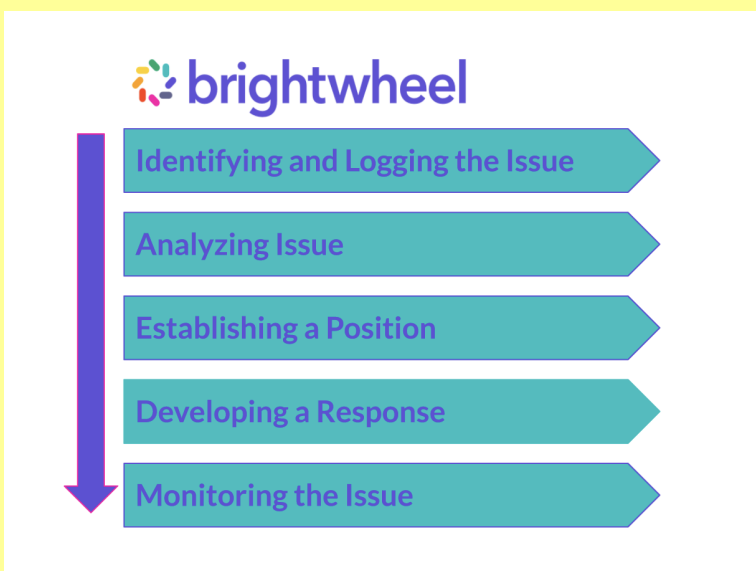
Risks and issues will be reviewed during the weekly team meeting. Risks and issues will only be closed by consensus of the team. The team will work together to establish a risk probability and risk severity. This will allow us to prioritize identified risks based on severity and impact.

Develop Response

The Government Account Manager will evaluate the impact to the project scope, schedule or budget. For example, a schedule impact means the due date of a major milestone or the end date of the project is impacted. The Government Account Manager will work alongside the project team to develop an agreed upon solution for both parties.

Closure & Monitoring

Once an approved issue resolution is decided upon, the GAM can move towards closing the issue. The GAM will determine whether the proposed solution was effective and if not begin the developing a response process again.



4. Customer Support

a. Training, Onboarding, and Ongoing Support

i. Describe how your proposed operations meet or exceed the requirements as described in Section 3.3. Please describe any difference in services between child care providers and multi-site networks (including ability to streamline implementation, training, onboarding and support across multiple sites), if applicable.

1. Please outline your proposed onboarding and training support solutions. Describe the frequency of their availability as well as the method(s).

2. Please describe any ongoing support services you plan to provide. Please include mention of any examples that support provider retention or promote sustainability business practices as it relates to CCIMS.

Brightwheel has extensive experience onboarding and training hundreds of programs a week onto our platform. We have the largest in-house customer onboarding and support team in the industry and as a result can guarantee we are able to effectively support programs and networks through the adoption and implementation of brightwheel.

All programs that are a part of this contract will have access to our VIP Support Team, customer onboarders and engagement specialists. These different support channels will be there to assist each member of this project through onboarding until they hit activation. In addition, we are able to provide direct support to parents that are enrolled in our programs. Below you will see a breakdown of the different types of support programs will receive.

Implementation & Support Roles

Implementation Specialist: provide group training for programs across Indiana. Is also able to create unique sessions requested specifically by our larger partners (ex. SSA's, multi-site locations).

VIP Support Team: offers multi-channel communications, rapid response times, and high customer satisfaction scores.

- Channels: Email, live chat & phone support
- Hours: 8am-5pm CST, Mon-Fri with limited weekend support

Customer Onboarders: host training calls with programs. Set them up with their brightwheel account, help them add students and families and train them on the basics of the tool to get them activated. We also have onboarders specifically for multi-site and network partnership ensuring the training fits the needs of their program.

Engagement Specialists: provide proactive support to individual providers using brightwheel. Sharing updates on new product releases, training them on features, answering questions and ensuring long term adoption of the tool.

Billing Specialists: Provide targeted coaching and support on billing specifically. Helping them learn to automate tuition to maximize their earnings.

Onboarding & Support

Brightwheel is able to provide on demand and live training to child care providers across Indiana. Typically we divide training into two sessions.

The **first session will focus on the administrative functionalities of brightwheel**. This includes activities like adding students & families, learning attendance & check-in, staff management, and streamlining parent communications and record keeping.

The **second session is focused exclusively on our billing tool**. During this session, we will help providers create billing plans to send out automated invoices and receive online payments from their families. This session also teaches them to edit, customize or add discounts to payments.

Additional training for new features or deep dives into existing features will be available by request through an implementation specialist. This ensures providers across Indiana are always trained on the most up to date version of the platform.

In addition to live training and support, brightwheel also has a substantial library of help articles, videos, and gifs that serve as an online training manual. This library is organized by relevant collection topics including: program setup, using brightwheel, reports and data, brightwheel billing, parents, family and approved pick-ups, account management and more. All topics are regularly updated by the brightwheel team, and include video learning support and dynamic gif visuals. You can see our hundreds of support articles by visiting: help.mybrightwheel.com. We also have hundreds of instructional videos that can be accessed on the [brightwheel youtube channel](https://www.youtube.com/channel/UCv8v8v8v8v8v8v8v8v8v8v8) including step by step guides for families and teachers.

Finally, brightwheel provides regularly scheduled webinars and boot camps for additional training. Brightwheel users can attend these sessions live or watch the recordings at their convenience. Some examples of recent sessions include:

- *How to successfully onboard staff on to brightwheel*
- *How to create lesson plans in brightwheel*
- *How to simplify your parent teacher conferences*

You can access our library of webinars by visiting: <https://mybrightwheel.com/webinars/>.

Lastly, our customer support team is available Monday-Friday 8am-5pm CST. We offer live chat and phone support to program administrators during business hours, with typical response times under 1 minute and resolution time of 30 minutes. We also provide non-live email support for admins with response times of 2 hours and resolution times of 1 business day.

For guardians (parents) with children that attend a program leveraging brightwheel, we offer non-live email support with a response time of 4 hours and resolution time of 1 business day. Our overall customer satisfaction (CSAT) scores for admins is 97%+, which represents the % of customers that rated their conversation a 4 or 5 on a 5 point scale with 5 being the highest.

Brightwheel also offers speedy access to our Support Specialists, right from your brightwheel account via our chat feature. While logged into a brightwheel account, you can click the brightwheel logo at the screen's lower-right and create a message to start a Live Chat, or to send your message to the brightwheel Support team if outside Live Chat hours.

Support will not stop post implementation. Once the recruitment and onboarding phases are completed, each individual provider will be assigned an engagement specialist. This engagement specialist will regularly and proactively check-in with each individual program via NPS surveys, webinars, new feature release sessions, requested training and specialist check-ins. Brightwheel will also provide continuous education on the new product releases to ensure providers feel confident in navigating the tool. Lastly, providers and families can always access our support team at any time for immediate support through our live chat feature.

Here are some key data points & testimonials:

- Saving time using Brightwheel:
 - *Estimated 20 hours saved, per month, per employee*
- Maximizing their revenue collection with automation:
 - *>75% of Brightwheel customers adopt billing within 30 days*
- Increase family communication & happiness
- 100% report no time lost, 80% save 1-5 hrs a week
- 100% of families are more satisfied with their program



5. Recommended Functions and Services

a. Describe if your proposed operations meets the recommended functions and services as described in Section 3.4. If you do not currently offer those services, please specify if you would be willing to customize your system to adopt these components and if so, how and in what timeframe. For each subsection listed below, please fill out the associated Table 2: Recommended Functions and Services included in Attachment L. In the yellow field below, please enter a supplementary narrative explaining your responses to the associated table in Attachment L. If any of your offerings differ by provider type, please describe the differences. Please describe any difference in services between child care providers and multi-site networks, if applicable (e.g., ability to perform services for all sites with one account, ability to conduct key functionalities by site or across all sites, etc.). For the following items, be sure to address the specific questions as part of your function-by-function description.

i. Nutrition Services

1. Please describe your system's current nutrition functions.
2. Please describe if you currently have functionalities to manage CACFP or would be willing to develop software, and if so, what the plan and timing for implementation would be.

ii. Provider Financial Data and Analysis

iii. Human Resources

1. If you currently offer or are planning to offer human resources features, including payroll services, please describe if this function is embedded in your system or if it is offered through a subcontractor.

iv. Platform Language Capabilities

1. If your system includes language capabilities, please list the languages your platform is available in, and for what components. Specifically, describe what languages are available for family-facing components and provider-facing components. If your platform does not currently offer Spanish, please explain if you plan to adopt language capabilities. If so, please describe how, and in what timeframe.
2. Please describe how your language capabilities are achieved. If you do not have language capabilities other than English as part of your platform, please describe if you plan to make them available.

v. Other Innovative Functions and Services

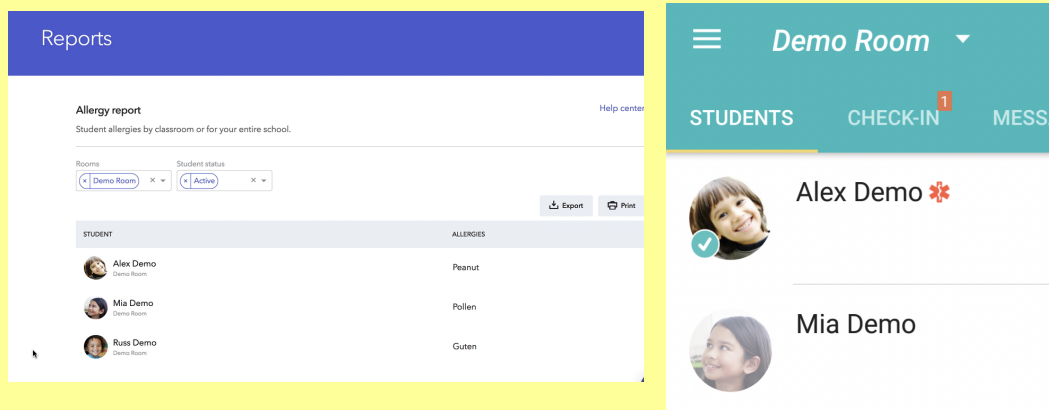
1. Please describe any additional functions or services you are able to offer out-of-the-box, if applicable.

1. Nutrition Services

Allergy Information

In the Health Section of the student's profile, family members and admins are able to add information like medications and allergies. This creates a red allergy badge on the students photo in the brightwheel application. The badges allow you to quickly spot which students have allergies, so you don't have to click into each child's profile to see if they have any sort of allergy. The allergy icons will appear on the home screen, and when selecting students for a food activity.

Administrators can also pull an allergy report. This will quickly pull allergy information across your entire program.

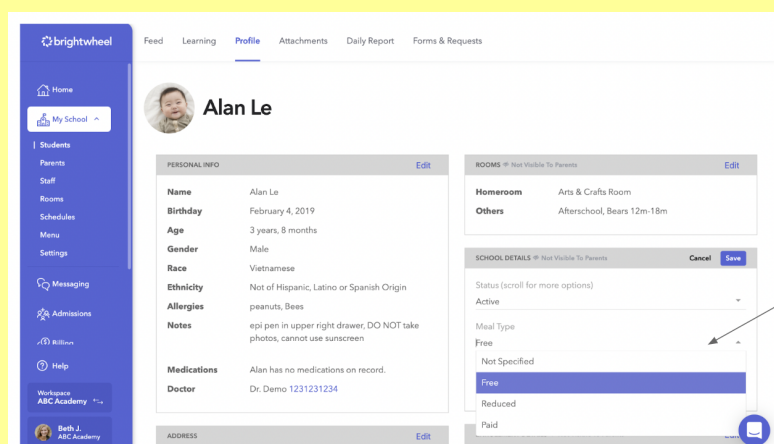


CACFP Functionality

Brightwheel has a comprehensive CACFP tool including menu creation, meal tracking, report generation and eligibility.

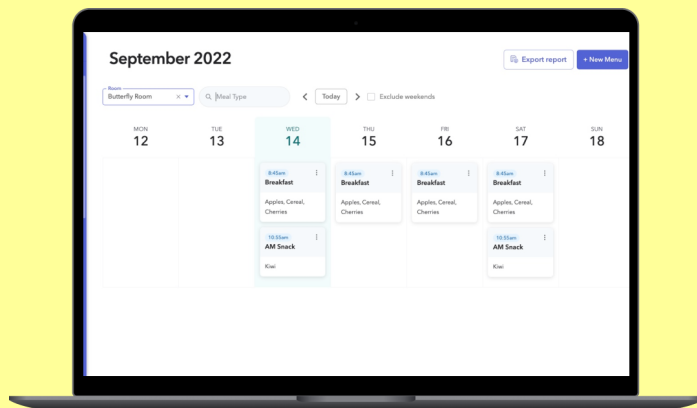
Eligibility Level

The School Details panel in a student's profile allows the school to input information for internal use specific to each student, such as: Student Status, Schedule, Time In/Out, Gender, Meal Type, and Student ID. For meal type, the choices are Free, Reduced, Paid or not specified. This is important for CACFP reporting. See photo below.



Menu Planning

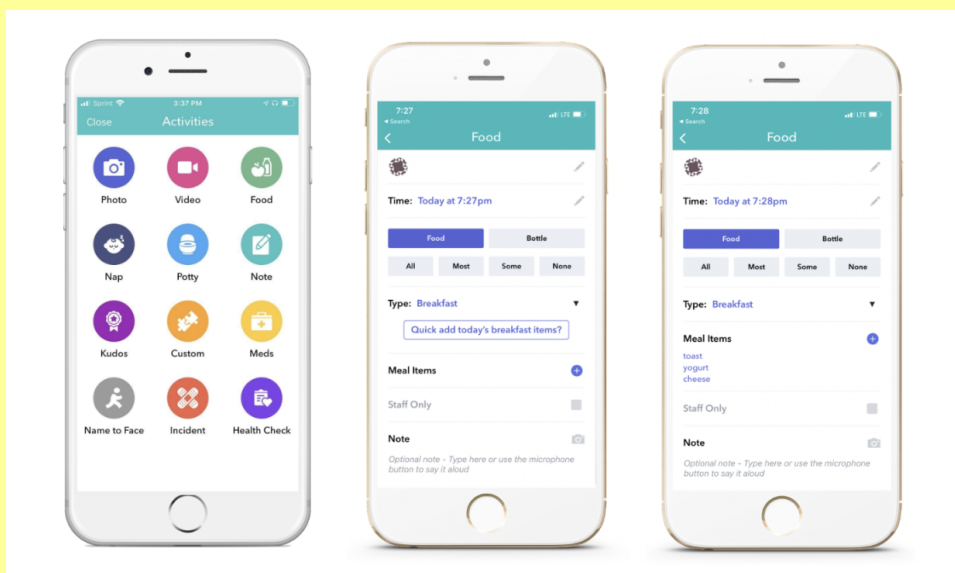
Brightwheel's menu planning feature helps administrators create a detailed food menu for each room or program. Distinct menus can be created for each meal across every room and can be easily duplicated to quickly populate weekly or monthly menus. Administrators can assign food items to the menu and organize these items based on CACFP food categories and serving sizes. Menus can be easily exported as a CSV or PDF to facilitate compliance reporting.



brightwheel		Blue Bird Preschool		Weekly Menu		12/1/2021
Dates		10/1/2020 - 10/1/2021		Room		All Rooms
		Monday	Tuesday	Wednesday	Thursday	Friday
Breakfast	1 c. Lowfat Milk	1 c. Lowfat Milk	1 c. Lowfat Milk	1 c. Lowfat Milk	1 c. Lowfat Milk	1 c. Lowfat Milk
	1/2 c. Scrambled Eggs	1/2 c. Diced Peaches	1 c. Life Cereal	1 c. Yogurt	1 1/2 oz. Pancakes	1 1/2 oz. Pancakes
AM Snack	1/2 c. Applesauce	1 each WG Toast	1 each Kiwi	1/2 c. Strawberries	1/2 c. Applesauce	1/2 c. Applesauce
	Water	Water	Water	Water	Water	Water
Lunch	3/4 c. Lowfat Milk	3/4 c. Lowfat Milk	3/4 c. Lowfat Milk	3/4 c. Lowfat Milk	3/4 c. Lowfat Milk	3/4 c. Lowfat Milk
	1 1/2 oz. Mac & Cheese	1 1/2 oz. Baked Ham	1 1/2 oz. Herbed Chicken	3/8 c. Black Bean Soup	1 1/2 oz. Hamburger	1 1/2 oz. Hamburger
PM Snack	1/4 c. Tossed Salad	1/4 c. Sweet Potato	1/2 c. Green Beans	1/2 c. Spinach Salad	1/4 c. Mixed Veggies	1/4 c. Mixed Veggies
	1/4 c. Orange Slices	1/4 c. Steamed Broccoli	1/4 c. Mixed Berries	1/2 c. Mandarin Oranges	1/4 c. Cantaloupe	1/4 c. Cantaloupe
Dinner	1 c. Apple Juice	1 c. Apple Juice	1 c. Apple Juice	1 c. Apple Juice	1 c. Apple Juice	1 c. Apple Juice
	3 oz. pretzel	3 oz. pretzel	3 oz. pretzel	3 oz. pretzel	3 oz. pretzel	3 oz. pretzel
Late Snack						

Documenting Meals Served

Providers can use the food tracking activity to record the point of service. Teachers and admins can easily select one, many or all students and record a food activity. It will automatically timestamp at the point of services. In addition, programs can click, "Quick add today's menu items" and it will automatically pull the items from the menu you have created in brightwheel.



CACFP Reports

The brightwheel meal reporting tool can be leveraged to collect necessary data to ensure a school or center is in compliance with the Child and Adult Care Food Program. When a provider is ready to share this information, they can go to the reporting section in the brightwheel tool and select the meal report. When a meal report is run, the data tracked in the mobile application is compared with the student's food program qualification status and attendance. This allows meal reports to include student attendance data, qualification status, meals served and food details. Brightwheel has also recently hired team members who have previously worked on Child and Adult Care Food Program tooling to join our team to ensure long term compliance.

CACFP-Report-2022-10-21 13_29_43 UTC (3)

First Name	Last Name	Student ID	Room	Date	Time in	Time out	Time Checked In	Attendance	Student Type	Breakfast	AM Snack	Lunch	PM Snack	Dinner	Late Snack	Not Specified	Total Meals
Alice	Porter		Elephant	02/02/2022	04:59:47 PM	02/02/2022 07:00:00 PM	02:00:13	Yes	Free	1	1	1	1	1	1	0	6
Jeremiah	Jones		Bear	02/15/2022	02:30:56 PM	02/15/2022 06:00:00 PM	03:29:04	Yes	Paid	1	1	1	1	1	1	0	6
Kim	Stimson		Bear	02/15/2022	02:30:56 PM	02/15/2022 08:00:00 PM	05:29:04	Yes	Free	1	1	1	1	1	1	0	6
Bahara	Shihab		Bear	02/15/2022	02:30:56 PM	02/15/2022 07:09:00 PM	04:38:04	Yes	Free	1	1	1	1	1	1	0	6
Mia	Callahan		Bear	02/15/2022	02:30:56 PM	02/15/2022 07:00:00 PM	04:29:04	Yes	Paid	1	1	1	1	1	1	0	6
Quincy	Monroe		Bear	02/15/2022	02:30:56 PM	02/15/2022 09:00:00 PM	06:29:04	Yes	Reduced	1	1	1	1	1	1	0	6
Elizabeth	Haas		Bear	02/15/2022	02:30:56 PM	02/15/2022 06:00:00 PM	03:29:04	Yes	Reduced	1	1	1	1	1	1	0	6
Bahara	Shihab		Bear	02/16/2022	09:32:25 AM	02/16/2022 10:00:00 AM	00:27:35	Yes	Reduced	1	1	1	1	1	1	0	6
Jeremiah	Jones		Bear	02/16/2022	09:32:25 AM	02/16/2022 01:28:00 PM	03:55:35	Yes	Reduced	1	1	1	1	1	1	0	6
Kim	Stimson		Bear	02/16/2022	09:32:25 AM	N/A	00:00:00	Yes	Reduced	1	1	1	1	1	1	0	6
Elizabeth	Haas		Bear	02/16/2022	09:32:25 AM	02/16/2022 06:00:00 PM	08:27:35	Yes	Reduced	1	1	1	1	1	1	0	6
Quincy	Monroe		Bear	02/17/2022	09:32:25 AM	02/17/2022 01:11:00 PM	03:38:35	Yes	Reduced	1	1	1	1	1	1	0	6
Alice	Porter		Elephant	02/17/2022	11:47:24 AM	02/17/2022 11:48:12 AM	00:00:48	Yes	Reduced	1	1	1	1	1	1	0	6
Alice	Porter		Elephant	02/17/2022	11:47:24 AM	02/17/2022 11:48:23 AM	00:00:08	Yes	Reduced	1	1	1	1	1	1	0	6
Alice	Porter		Giraffe	02/17/2022	11:47:49 AM	02/17/2022 11:48:08 AM	00:00:18	Yes	Reduced	1	1	1	1	1	1	0	6
Alice	Porter		Giraffe	02/17/2022	11:48:23 AM	N/A	00:00:00	Yes	Reduced	1	1	1	1	1	1	0	6
Bahara	Shihab		Bear	02/23/2022	11:04:02 AM	02/23/2022 05:04:22 PM	06:00:19	Yes	Reduced	1	1	1	1	1	1	0	6
Bahara	Shihab		Bear	02/23/2022	11:06:30 AM	N/A	00:00:00	Yes	Reduced	1	1	1	1	1	1	0	6
Kim	Stimson		Bear	02/23/2022	11:04:05 AM	02/23/2022 05:04:45 PM	06:00:39	Yes	Reduced	1	1	1	1	1	1	0	6
Elizabeth	Haas		Bear	02/23/2022	11:05:00 AM	02/23/2022 02:05:05 PM	03:00:04	Yes	Reduced	1	1	1	1	1	1	0	6
Jeremiah	Jones		Bear	02/23/2022	N/A	N/A	00:00:00	No	Reduced	0	0	0	0	0	0	0	0

Room
Select Student's Status
08/06/2017
11/30/2018
Apply

08/06/2017 - 11/30/2018
Export Summary
Export Records

TOTAL ATTENDANCE DAYS		51
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STUDENT TYPE	# OF STUDENTS	% OF TOTAL
Free	0	0.00%
Reduced	0	0.00%
Paid	1	4.17%
Not Specified	23	95.83%
Total	24	100.00%

MEAL TYPE	MEALS SERVED
Breakfast	7
AM Snack	24
Lunch	54
PM Snack	25
Dinner	0
Late Snack	0
Not Specified	2

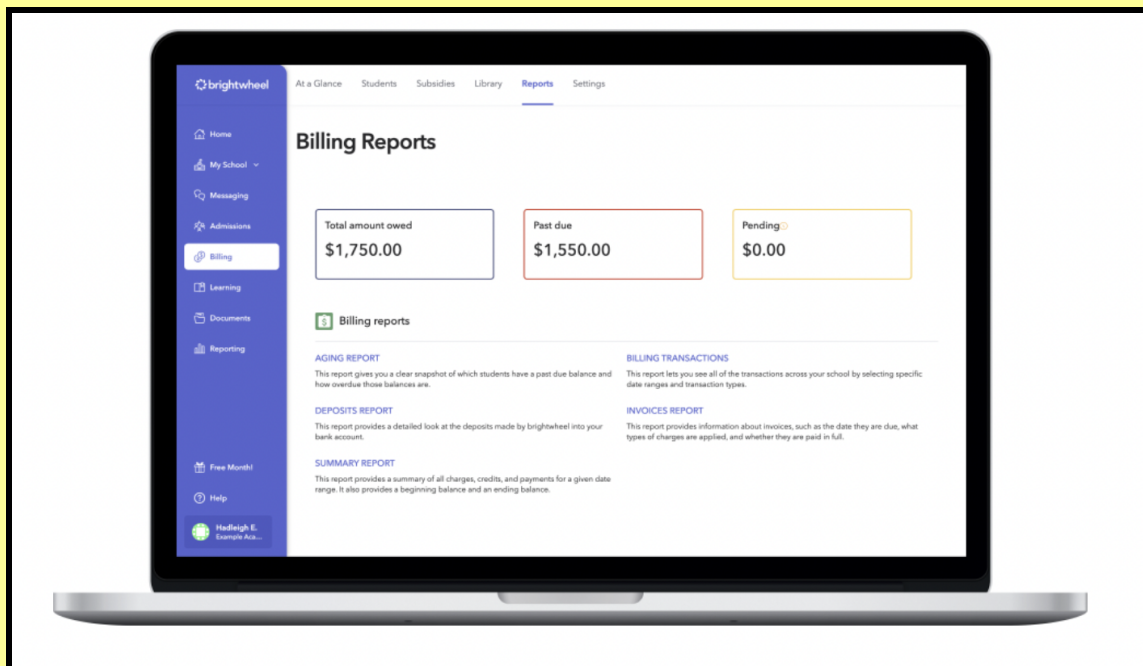
2. Provider Financial Data and Analysis

Brightwheel has robust reporting and tracking capabilities built into our billing platform. This allows providers to use brightwheel to streamline their accounting process.

Billing Reports: Tuition/Income Collected & Balances Due

Brightwheel billing allows providers to create billing plans to capture tuition and income collected and balances due. With brightwheel billing, administrators have more access to reports & data than ever before. Report examples include:

- **Aging** - run a report by Student, Classroom, or Status that tracks past due payments.
- **Deposits Report** - all deposits made to your bank account.
- **Billing Transactions** - detailed billing transactions report or a high-level summary for taxes.
- **Billing Summary** - high-level view of all the charges, credits, and payments a center has accrued over a given date range.
- **Invoice Report** - all invoices that have been posted across students, and which have been paid.



Quickbooks Compatibility

Brightwheel's latest billing platform is compatible with Quickbooks Online. Using brightwheel reports, admins can easily transfer billing transaction data from brightwheel to Quickbooks Online, in order to complete their accounting processes. Admins looking to replicate brightwheel billing data in Quickbooks can transfer student invoice or payment / credit transactions by simply running the Charges or Payments & Credits reports, downloading the CSV files, and uploading those files into Quickbooks — no need to manipulate the data first, before importing. This is a huge time saver.

Offline Payment Features

Any payment that is submitted and processed outside of brightwheel can be recorded as an offline payment and applied toward a student's invoice or balance, including:

- cash payments
- check payments
- subsidy or agency payments
- payments processed through a third-party tool, such as Venmo, Zelle, or PayPal
- any payment submitted, processed, or collected outside of brightwheel

When recording an offline payment, administrators can opt to send an emailed receipt to parents. This allows providers to understand all tuition collected not just what was billing through the brightwheel platform.

3. Human Resources

Track and Calculate Staff Hours Worked

Tracking staff members' check-in/out records in brightwheel is a great way to keep track of employees' hours for payroll. Staff can sign in to their program in the morning the same way that families check-in their children. Each individual staff member receives their own four digit code so administrators can see exactly when they are on site and working. From there, with the Timecards Report, administrators can report on an individuals' in/out records for any desired date range. The timecards are organized by date, so all the individual check-in and check-out events for a single day will be grouped together. This will allow admins to more easily see daily total hours for their staff and get a clearer picture of breaks and room changes. Lastly, staff can view timecards on the mobile app to quickly identify discrepancies and raise them to admins.

Payroll Report

The Payroll Report will generate the total number of regular hours and overtime hours a staff member has worked in a specific date range. By default when navigating to the payroll report, all staff members will be listed with the total regular hours and overtime hours they have worked from their very first shift to the most recent. Administrators have the option to filter this report as needed. Administrators can also use the payroll report to calculate overtime hours worked by staff. The calculations are based on the program's week start day which defaults to Sunday but can be easily changed at any time in school settings.

Brightwheel is in the process of building actual payroll within brightwheel. This is one of our main focuses for 2023 and is already being scoped by our team. We hope this will be ready for implementation in a few months.

Staff Scheduling: Sicks Days & PTO

A crucial part of managing any early childhood education program is scheduling – both understanding how many students will be in attendance in any given classroom each day and ensuring that staff members are scheduled appropriately given student schedules and capacity. The student and staff scheduling feature enables an administrator to enter custom repeatable schedules for each individual student and staff member at the program by room. This helps ensure proper staffing to maintain each room's target ratio.

The schedules page is visible to all staff members on the web and mobile app but can only be modified by administrators. The Daily view will display each shift record in addition to student-to-staff ratios. Only students with an 'Active' Enrollment Status will appear on the Schedules tab. Student absences, Staff PTO time, and Staff Sick time will be displayed on the Schedules tab for that day or week in a dark grey block.

	4 Sunday	5 Monday	6 Tuesday	7 Wednesday	8 Thursday	9 Friday	10 Saturday
Staff scheduled this week							
Daily staff count	--	4	2	3	2	4	--
Beth Jones 30 hours		Preschool Room 7:00am-12:00pm Infant Room 1:00pm-6:00pm		Preschool Room 7:00am-12:00pm Infant Room 1:00pm-6:00pm		Infant Room 7:00am-12:00pm Infant Room 1:00pm-6:00pm	
Janet Smith 44 hours		Toddler Room 7:00am-12:00pm	Toddler Room 7:00am-12:00pm After-school Room 2:00pm-8:00pm	Toddler Room 2:00pm-8:00pm	Preschool Room 9:00am-4:00pm After-school Room 2:00pm-8:00pm	Preschool Room 2:00pm-8:00pm	
Jennifer Lee 32 hours		Preschool Room 6:30am-2:30pm	Infant Room 6:30am-2:30pm		Infant Room 6:30am-2:30pm	Infant Room 6:30am-2:30pm	
Kiko Yamatoshi 39 hours		Infant Room 7:00am-8:00pm		Infant Room 7:00am-8:00pm		Infant Room 7:00am-8:00pm	
Students scheduled this week							
Daily students count	--	2	1	2	1	2	--
Alan Le		Infant Room 8:15am-7:30pm Infant Room 10:45am-8:15pm	Infant Room 8:15am-7:30pm Infant Room 10:45am-8:15pm	Infant Room 11:00am-4:00pm	Infant Room 8:15am-7:30pm Infant Room 10:45am-8:15pm	Infant Room 8:15am-7:30pm Infant Room 10:45am-8:15pm	
Addie Wilson		Preschool Room 8:00am-3:00pm		Preschool Room 8:00am-3:00pm		Preschool Room 8:00am-3:00pm	



Staff Documentation and Files

Staff Profiles in brightwheel allow school administrators and managers to keep track of all the important information regarding their staff and employment records. Two critical sections of the staff profile are Certifications and Professional Development Hours.

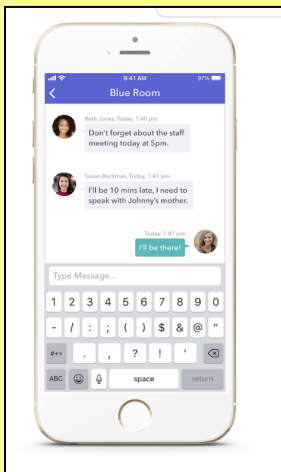
- **Staff Certifications:** The certifications section of the staff profile provides administrators and managers a centralized location to keep track of a staff member's official education. The following information can be logged in here:
 - **Degree:** Choose from GED/High School Diploma, Associate, Bachelor's, Master's degree, Ph.D/EdD/other doctorate degrees, and Other.

- **Certification:** Add in any certification(s) the staff member may hold.
- **Early Childhood Education Credits:** Add any ECE credit hours that this staff member has earned (numeral only field).
- **Infant Toddler Credits:** Add earned infant toddler credit hours here (numeral only field).
- **Notes:** Type any additional information regarding the staff member's formal education.
- **Professional Development:**
 - The professional development hours section of the staff profile is the perfect place to log any trainings, courses, or any other educational accomplishments that the staff member has attended (whether earned internally or through a third party).
 - Administrators may want to keep a copy of the certificate of completion or certification that they have logged in either of these sections of the staff profile. The Attachments section is a great place to store these in a centralized location.

Staff Health Checks can be used by administrators to track the health of each staff member upon arrival or use it throughout the day to proactively monitor staff health. Health checks can be logged for individual staff members or multiple if there are minimal variations in temperature.

Staff Communication

Brightwheel understands the importance of communicating with staff effectively. The messaging feature on the web and within the app acts as a centralized communication hub for staff and administrators. This helps to reduce the number of platforms used for communication and enables staff and administrators to easily share updates or coordinate with classroom staff instantly. This feature provides convenient one-on-one communication between administrators and staff, but also group staff messages where administrators can send group messages based on staff room assignments.



4. Platform Language Capability

Brightwheel is currently in the process of scoping the complete translation of the platform. This will include both the provider and parent application. We will be hand translating the platform to ensure the translation is accurate and not relying on any third party translation tools like Google Translate. The first language we will be releasing is Spanish.

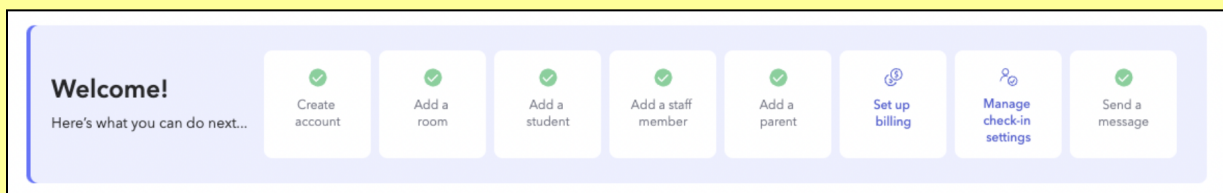
Today, the **messaging feature can be navigated in all languages and characters**. This allows families and providers to communicate back and forth in their first language. Families and providers are also able to upload and share documents in multiple languages.

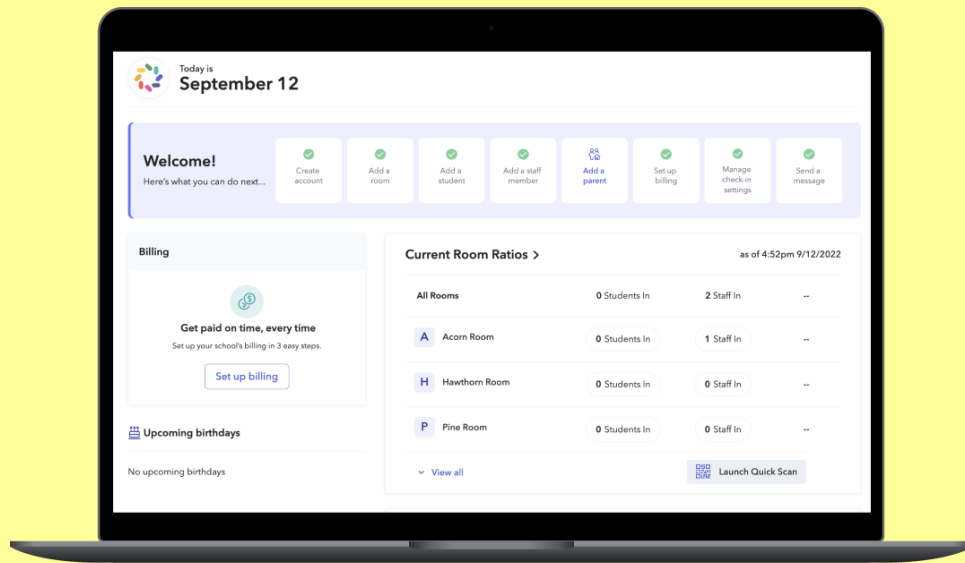
In addition, we provide live customized onboarding sessions and resources in Spanish to support the adoption of the brightwheel platform. This ensures that programs are receiving the support they need to utilize the tool in their first language. Lastly, the brightwheel platform is built mostly with large icons and images allowing it to be more easily used by providers and families who do not speak English. In fact, brightwheel is used today across the globe by many programs and countries that do not speak English.

5. Other Innovative Functions and Services

Brightwheel Self-Serve Onboarding Flow

Brightwheel has launched a new self-serve onboarding flow within the platform that auto-populates when a new account is created. This becomes an interactive guide for teachers and administrators to get trained on how to use the system. Across the top of the homepage, providers will see a "Welcome" banner with various icons referencing vital steps to take when onboarding with brightwheel. The onboarding checklist covers all the basic tasks needed to get your program successfully leveraging brightwheel, and each checklist item a provider clicks on will direct them to the proper place in the product to perform the task. In addition, the onboarding flow populates three "demo children" and encourages providers to test features with these students without the risk of entering any information incorrectly. Since the release of this feature, brightwheel has seen a drastic change in the time it takes for a provider to complete onboarding and hit activation with a majority of programs (74%) fully utilizing the entire platform within the first 90 days.





Roster Upload Feature

The speed to which a program adds students and families to their brightwheel account is critical to a successful long term implementation. We learned early on that the transition of information from pen/paper or another technology system was one of the most difficult hurdles to overcome. Therefore, we built the Roster Upload functionality in brightwheel. This is a major product differentiator from other CCMS vendors in the space.

Through the roster upload tool, we accept rosters in many formats (CSV, XLSX, PDF, and doc), and we even have a template to use if needed. Once providers have exported their roster from another system or taken a photo, they can easily upload it to your brightwheel account on the web. They can also upload additional fields including but not limited to:

- *first_name - Student's first name.
- *last_name - Student's last name.
- birthdate - Student's date of birth, formatted as M/D/YYYY.
- gender - At this time, our system is limited to "male", "female", or "other".
- race - This field allows for any combination of the following entries - if selecting more than use, separate with a semicolon: American Indian or Alaska Native, Black or African American, White, Chinese, Filipino, Asian Indian, Vietnamese, Korean, Japanese, Other Asian, Middle Eastern or North African, Native Hawaiian, Samoan, Chamorro, Other Pacific Islander, Some Other Race
- ethnicity - Please enter either Hispanic, Latino or Spanish Origin OR Not of Hispanic, Latino or Spanish Origin
- allergies - Enter all student allergies here. If there is a valid entry, allergy badges will appear on student profiles.

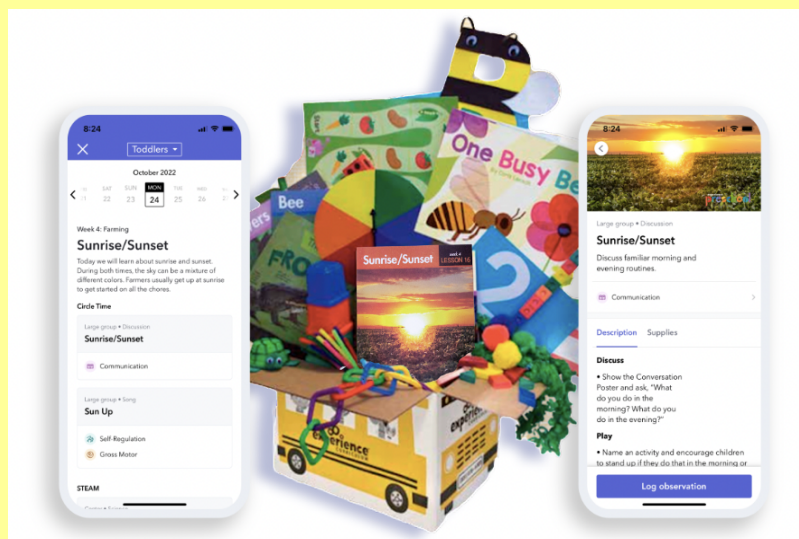
- notes - Notes are a great way to document special needs or any other useful information about this student or family. This is a free-form field.
- medications - This is a free-form field; enter any medications necessary here.
- doctor_name - Doctor's full name.
- doctor_phone - Doctor's phone number.

Brightwheel also can support the downloading of information from other systems and take the same steps to ensure the information is transferred into the new system by the time the program attends their first onboarding session. This service and feature directly correlates to why brightwheel has such high activation and long term implementation rates.

Integrated Online Curriculum

Brightwheel has a strategic partnership with Experience Early Learning which allows their curriculum to automatically populate into the brightwheel platform. This digital curriculum works alongside materials and resources that can be sent to a provider's house or center on a monthly basis. Brightwheel Learning with Experience Curriculum offers a unique hybrid learning option to equip teachers both online and offline to engage children and their families through meaningful play experiences. By selecting the hybrid option, educators can customize digital lesson planning tools, individualize family engagement resources and authentically assess learning to inform how they use the hands-on materials. Each month, the teacher receives a curated collection of multi-sensory, theme-connected materials to bring the digital daily lesson plan to life and invite children to create and explore ideas through hands-on discovery. Whether a teacher is new or a seasoned professional, Brightwheel Learning with Experience Curriculum is easy to implement and offers a comprehensive early learning and family engagement program.

In addition, Experience Early Learning is aligned with Indiana State Standards. Here is a [link to the alignment documentation](#) for review.



Custom Report Builder

Brightwheel's powerful Custom Report builder allows administrators to pull data from different areas within the brightwheel platform and the flexibility to organize that data in a way that best meets the needs of their program.

In addition, the custom report builder is an invaluable tool for multi-site programs and large networks. Using the Custom Report Builder, our partners are able to pull data populated within brightwheel across multiple programs. This gives them the flexibility to organize data in a way that best meets the needs of your organization's reporting goals. This data is real-time and updates regularly.

The Report Builder is a flexible tool that can meet a wide variety of reporting needs. There are several parameters that can be applied to help hone down the results that will populate within a custom report.

The following are examples:

- **Dimensions:** descriptive information stored within brightwheel, i.e. names, labels, categories and fields
- **Metrics:** numerical values calculated from information logged within brightwheel. Student counts and Room counts are examples of Metrics.
- **Date Range:** the date range for which results will be populated
- **Filters:** apply more granular filters for which results are included in the report (E.g. filtering to only show students with a status equal to "Active" vs. "Waitlist")
- Each parameter has a drop-down menu of different data points that can be selected to add to the report. Multiple dimensions and metrics can be included within a single report.

Here are some examples of reports that can be pulled by networks or alliances:

Number of Students by Student Status

- Understanding enrollment numbers
- Understanding waitlist numbers across multiple locations
- Key to supply & demand

The screenshot shows the Brightwheel Report Builder interface. On the left is a sidebar with navigation links: Home, Locations, Reporting (selected), All reports, and Report builder. Below this is a 'Workspace Organization' section with a user profile for 'Lex L. Super admin'. The main area is titled 'Report builder' and contains several configuration sections: 'Data set' (Students & families), 'Parameters' (Data Field: Location, Student Status), 'Metric' (Count of Students), 'Time' (empty), and 'Filter' (Student status: Does Not Equal, None, Duplicate, Graduated). At the top right are 'Export' and 'Save report' buttons. Below the configuration is a table with columns: Location, Active, Applied, Toured, Prospect, and Waitlist. The table contains data for seven locations: Ann Arbor - Main St., Ann Arbor - State St., Northville Twp., Novi - downtown, Novi - six mile, Plymouth - Merrimen, and Ypsilanti.

Location	Active	Applied	Toured	Prospect	Waitlist
Ann Arbor - Main St.	123	25	3	1	13
Ann Arbor - State St.	115	27	5	2	15
Northville Twp.	75	10	0	0	16
Novi - downtown	77	11	0	0	7
Novi - six mile	25	10	2	1	19
Plymouth - Merrimen	110	13	4	2	24
Ypsilanti	15	6	1	2	4

Total Student Attendance Days per Month

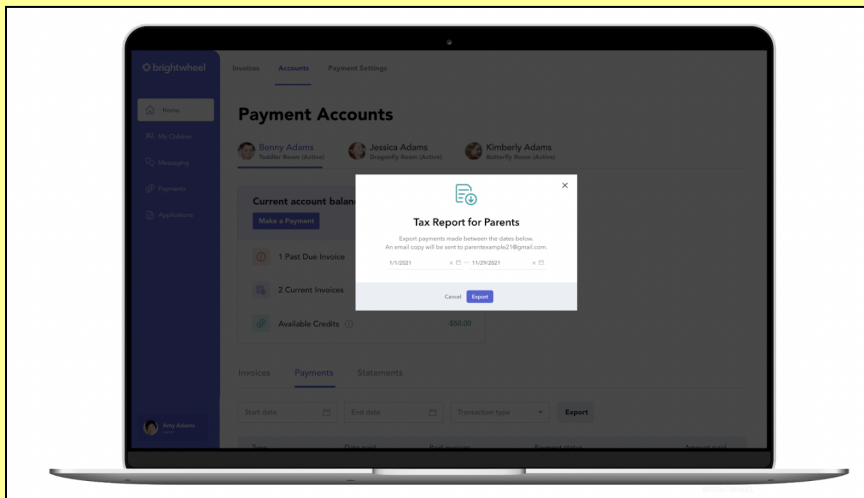
- Understanding attendance rates monthly across locations

The screenshot shows the Brightwheel Report Builder interface for a different report. The sidebar is the same. The main area is titled 'Report builder'. The configuration sections are: 'Data set' (Students & families), 'Parameters' (Data Field: Location), 'Metric' (Attendance count), 'Time' (Attendance date: for This year by Month), and 'Filter' (Student status: Equals, Active, Prospect, None). At the top right are 'Export' and 'Save report' buttons. Below the configuration is a table with columns: Location, January, February, March, April, and May. The table contains data for the same seven locations as the first report.

Location	January	February	March	April	May
Ann Arbor - Main St.	75	62	70	71	69
Ann Arbor - State St.	14	22	18	20	19
Northville Twp.	22	35	36	40	39
Novi - downtown	22	35	36	40	39
Novi - six mile	58	52	55	59	51
Plymouth - Merrimen	23	35	36	27	21
Ypsilanti	15	21	18	19	15

Tax Report for Parents

Tax Reports automatically generate in brightwheel. Families are able to easily download their own report within customizable date ranges. This makes tax reporting seamless for providers, parents and administrators.



6. Data Standards and Interoperability

- a. As described in Section 3.5, please describe your commitment to allow data exchange from your system to the State.
- b. Describe any experience working with State API compatibility.

- a. Brightwheel is committed to allowing data exchange from our system to the State. We look forward to the opportunity to work together to scope the needs and requirements of this partnership.
- b. Brightwheel's most relevant experience to the requested work in the data standards and interoperability section is through our partnership with the State of Iowa. Through this relationship, we are building two custom integrations into state systems. We recently completed our API integration with their state subsidy system KinderTrack which allows child care providers in Iowa to submit their time and attendance directly through the brightwheel platform. In addition, we have started scoping the work to create an API integration into their operational data store which will transfer data from brightwheel to their new state system. Through our work with the operational data store in Iowa, we will be able to provide learnings, guidance and valuable insight when it is time to begin the work in Indiana.

In addition, brightwheel currently has an active API with KinderSystems. This allows us to share time and attendance data with any state using the KinderSystems software. Today our child care management users in New York State and Missouri are able to

share their data via this API. We are also in the process of beta testing access in Louisiana.

Brightwheel also partners with many large nationwide enterprise organizations (that we keep nameless for confidentiality). Through these partnerships, we share data on a scheduled cadence using Amazon Web Services as the interface for the API. In short, we have a lot of experience and believe we would be strong partners in this work.

7. Vendor/Provider Contract Structure

- a. Please describe how you will establish your own contracts or agreements with child care providers or networks that choose to utilize your services. Describe the process you plan to follow, as well as how billing and invoicing would work to collect payments directly from providers after the initial State-funded 2-year period. Be sure to include how billing and invoicing would differ for stand-alone child care providers and multi-site networks, including how administrative teams for child care provider networks that operate multiple sites can access and manage the billing process for all sites in one place.
- b. As described in Section 5, please describe how you plan to promote continuous utilization of your CCIMS services for your childcare providers and networks beyond the initial 2-year period.

Contracting Process

Brightwheel has extensive experience creating individual agreements with child care providers as this is the standard process for the majority of our customer base. We plan to alter our standard partnership agreement to reflect specifics of this state relationship including duration of partnership and discounted pricing.

There are two ways that a provider can establish a formal agreement with brightwheel. First, when a provider creates an account on brightwheel, the system prompts them to agree to terms within their brightwheel account before they go to set their password. We will ensure programs in Indiana will be prompted to agree to terms discussed in this request for proposal.

Alternatively, for those that prefer a physical agreement, brightwheel has partnership agreements we use for all of our offline payers and larger networks that we can replicate and send for signature. These agreements are already being used today by organizations in Indiana.

Program Transition

Once the two year state funded opportunity is complete, brightwheel will guide programs through the transition to self-payment. In fact, we support this transition today when grant funding expires for many of our non-profit partners. Thirty days prior to the end of the contract, each individual program's engagement specialist will reach out to start discussing the transition. We will review the benefits they have gained from using brightwheel and provide rationale and

data points for continuing with the software. It is important to note that the transition will be seamless and no data or information will be lost - in fact, the program won't even notice a difference.

Once programs agree to remain on brightwheel, they are able to easily go to the "Subscriptions" tab within their brightwheel account and add a payment method. This can be a credit card, debit card or bank account. The system will then automatically withdraw the total amount on a monthly basis. We find that giving programs the opportunity to pay monthly is critical to their ability to use the software long term.

Brightwheel also has the option for programs to purchase annual subscriptions and mail a check directly to the brightwheel PO. Box. Our subscriptions team is well equipped on coaching providers through the payment experience that makes the most sense for their program.

We plan to build in an additional 30 day free transition period to give programs the time to make that switch to self-payment. We are more concerned with making it seamless and stressless and are willing to give a grace period to accommodate.

For multi-site center organizations or shared service alliances that support multiple programs, we are able to invoice an organization for the cost of all of the programs under their organizational umbrella. They will be billed offline annually or if they prefer to pay monthly, it is also possible for a program to do so for multiple locations within the subscriptions tab. This is common and something we do for tens of thousands of programs and organizations already.

Continued Usage of CCMS

Brightwheel is well-equipped to support programs with continued usage of CCMS after the contract expires. As programs are onboarding onto brightwheel, they will meet a wide range of individuals from onboarders to billing and engagement specialists. We have coached our customer facing teams through asking the right questions and leaning into relationships to build long term partnerships with child care programs and networks including understanding the nuances of their daily operations and how brightwheel can support their program long term.

Brightwheel also focuses on data and metrics with our customers. We also use testimonials to show what value they could see if they continue to use the platform and what they are at risk to lose. Here are some examples of the metrics we share:

- Programs report saving up to 1 hr per day, **per staff member**
- 80% of programs report between 1-5 hrs saved
- Costs are significantly reduced - no paper, consolidating systems, ink
- Staff Retention Increased
- Parents are happy and they refer other parents
- Fees are collected in full and on time

Overall, brightwheel has an industry low churn rate. This means once programs are activated on brightwheel the number that leave the platform is less than 1%. This speaks to the strength of our platform and the immediate value it brings to programs.

8. Service Level Agreements (SLAs)

- a. Provide details and describe SLA for network availability.
- b. Provide details and describe SLAs for incident response. Include how incidents will be handled and communicated to the State.

Network Availability

Brightwheel targets **99.99% uptime**. In addition to uptime, we track our product responsiveness and latency 24x7. There is almost no downtime or unavailability throughout the year (including weekends and holidays). We also track response time and target that **98% of requests complete in under 300ms**. Brightwheel also has the largest in-house engineering team in the industry. As a result, if we ever run into a network availability issue in the future we are well-equipped to provide an immediate solution. Today our support team provides less than 60 seconds (on average less than 30 seconds) response times and 30 minute resolution times with a customer satisfaction score of 97%.

We follow the same incident response plan named Attachment #1 below (pg. 53) if we have any issues with Network Availability.

Incident Response

The brightwheel team is trained based on our Brightwheel Incident Response Plan (Reference Attachment #1 below, pg. 53). As always, we try to minimize the frequency of outages and their impact on our customers but we are prepared to handle them when they arise. Customers can view our status at any time by visiting: <https://brightwheel.statuspage.io/>. In addition, customers can subscribe to this page which will automatically send an email when an incident is reported.

The engineering team has automated monitoring and alerting in place which will automatically page the on-call engineer if any issues are detected. Our systems are set to alert as soon as possible. The on-call engineer will immediately investigate and then initiate an incident, if appropriate. The engineer will also notify the on-call communications manager.

The on-call communications manager is responsible for providing customers with notification of any major outages within a few minutes. From there, they will continue to update our status regularly until the issue is resolved. This will deploy our support team to be available to support programs immediately.

With regards to alerting the State, the communications manager will immediately notify the Government Account Manager. The Government Account Manager will contact the main point

of contact on the partnership as quickly as possible via both phone and email. From there, the government account manager will monitor and provide updates until there is a deployed solution.

9. Security

a. Please describe your overall security plan for this project including (but not limited to) protection of customer privacy, retention of State-owned data, network security, and disaster recovery.

Brightwheel is committed to keeping your data secure. Our in-house engineering team maintains and monitors all production data and infrastructure, and employs the latest technology and encryption methods to keep your data safe. We do not sell any personal information to third parties, and your personal data is only used in accordance with our [Privacy Policy](#). The system leverages database and application level constraints and runs periodic scans of the data to detect drift. These are in place to ensure data integrity.

All data stored on brightwheel application servers and databases is encrypted at rest. All data in transit is encrypted using 256-bit TLS encryption. All brightwheel software is under continuous review. Brightwheel also undergoes periodic third-party security audits to ensure the safety of our application and infrastructure. Security penetration testing is part of our internal code review process and we employ third-party pen-testing first to ensure our security.

Brightwheel offers a multi-tenant software solution that is deployed as a distributed containerized application. The system is deployed using Elastic Kubernetes Service (EKS) on Amazon Web Services (AWS) cloud infrastructure. All data is stored on redundant scalable storage devices provided by AWS. The software runs behind a web application firewall within a logically isolated section of AWS known as a Virtual Private Cloud (VPC). Additional network security is provided by a Network Access Control Layer (NACL), private subnets, and restricted security groups. Additional application and data security is provided by Role Based Access Controls (RBAC), SSL encryption in transit, and transactional data encryption at rest.

For disaster recovery, the persistent data is captured in two forms - a S3 Bucket and a RDS Database on Amazon Web Services. Both the S3 Bucket and RDS database are inherently highly available and distributed across multiple data centers. Each of these databases are also configured with regular backups and replication. Therefore, it can be rapidly provisioned on a new compute cluster whose configuration is captured in code.

Brightwheel's technology alone differentiates itself from the competitors in this space. Brightwheel has developed a native mobile applications for iOS, Android, and web - built on AWS for in a cloud-based environment. Each application is built from the ground up on fully owned and internally developed source code that is native to each platform (Swift for iOS, and Kotlin for Android). Unlike others in the industry, we do not develop on web (HTML) technology that is then put into a wrapper in order to render a mobile application. Our applications are native making them measurably more responsive and more secure. They are also more intuitive and easier to use because we align with the design standards of each platform (rather than rely

on a common web-based design); the iOS and Android apps each use the information architecture and design behavior as recommended by Apple and Google. In addition to the mobile applications, we have a robust web application, similarly built from the ground up using the latest web technologies (via ReactJS). All platforms are always in sync real-time. Brightwheel is the only child care management system on the market with two factor authentication.

Brightwheel maintains an industry-best 99.99% uptime. In addition to uptime, we track our product responsiveness and latency 24x7. By monitoring all applications, data, and infrastructure, we are committed to keeping all data safe. Brightwheel is the only child care management system on the market with two factor authentication. This makes it the most secure option for families and providers.

Attachment #1: Referencing Question 8 a./b.



Office of Early
Childhood and Out
of School Learning



Brightwheel SLA Plan:

<p style="text-align: center;"><u>On Call Engineer</u></p> <p>The engineering team has a set of automated monitoring and alerting features in place which will automatically page the on-call engineer if any issues are detected. The on-call engineer will immediately investigate and then initiate an incident, if appropriate.</p> <p>Responsibilities:</p> <ul style="list-style-type: none">• Immediately swarm and attack the issue• Main goal is to identify & solve issue• Notify the communications manager with the issue	<p style="text-align: center;"><u>Communications Manager</u></p> <p>The communications manager is on call to receive the incident update from the engineer. They will be responsible for monitoring the page and effectively developing a communication strategy for our users.</p> <p>Responsibilities:</p> <ul style="list-style-type: none">• Monitor regular updates from engineer• Develop individual communications plans for each incident• This document acts as a single source of truth for the related incident
<p style="text-align: center;"><u>Government Account Manager</u></p> <p>The account manager is responsible for all communications with you as the agency. As soon as our internal team is made aware of an issue, the account manager will keep you informed.</p> <p>Responsibilities:</p> <ul style="list-style-type: none">• Effectively communicate with State• Keep agency apprised of all updates and changes	<p style="text-align: center;"><u>VIP Support Team</u></p> <p>Support team is responsible for yielding all inbound communication concerns from users and families. They will follow communications playbooks to ensure all information is shared accurately with the team.</p> <p>Responsibilities:</p> <ul style="list-style-type: none">• Monitor questions for existing users via live chat and email• Ensure responses are made in a timely manner