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

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| **Respondent:** | Early Learning Ventures |

**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** 
   1. Describe your experience providing Child Care Information Management Systems (CCIMS) for other states or similar clients.
      1. Please describe your presence in Indiana, if applicable.
   2. 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).

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| 1.a. We currently provide CCIMS software to clients across 14 states. These clients range from individual child care home and center providers (licensed), to partnerships with various State-level shared service ECE network organizations, to state-specific departments. We currently work with over 600 individual child care providers that fall into these various categories. We are a preferred CCIMS vendor in the State of Louisiana.  1.a.i. We do have a presence in Indiana, working with the Early Childhood Alliance in Fort Wayne.  1.b. We have extensive experience working with all the different provider types you list, as we have current clients in each respective category. This experience includes, but is not limited to, SLAs and contracts, implementation, training, and technical support. |

1. **Core Functions and Services** 
   1. Describe how your proposed operations meets or exceeds 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.
      1. Enrollment Support
      2. Attendance Tracking
         1. Please describe your fraud prevention functions.
      3. Billing and Invoicing
      4. 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.
      5. Reporting Dashboards
      6. Document Management
      7. Child Portfolio
      8. Mobile Solution
   2. 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).

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| 2.a. Our services provided are the same across all client sites. Access is determined based on user permissions needed, and is dependent on how the client site(s) are setup in our Alliance CORE CCIMS. Individual child care providers and users present at just the individual site will only have access to the individual child care site (1 provider) under their user account. For client sites setup as multi-site networks (shared service alliances, provider hubs, etc.), we can assign a single user account (to as many users as are needed) that will allow that user to access all individual provider accounts under the user’s network to perform the work that is needed. In short, we can setup varying levels of system access, depending on the client need.  2.a.i. We have an online enrollment feature that allows child care providers to send out an online enrollment application to families. The unique online enrollment link for an individual child care provider can also be mass emailed out to as many families at once, as is needed, or can be placed on a child care provider’s website to promote organic enrollment. Parents complete the application and submit it back to the child care provider to review and approve. Once approved, all of the parent/child’s information entered into the online enrollment application is automatically entered into our system in the appropriate location. If a child care provider ever needs a parent to update their information, they can send out an update request for the parent to edit their information accordingly. This feature results in a huge time-savings for the child care provider, as it drastically reduces the need for manual data entry. We also have Parent Wait List and reporting features that allow child care providers to manage their wait list.  2.a.ii Our CCIMS has a full complement of attendance tracking features, including a kiosk option via any kind of device (parents/authorized pickups enter a security code to check children in/out), Mobile touchless option (via QR Code scan on Mobile Apps), and a manual option (provider staff manually enter in attendance times). All of these attendance tracking features come with corresponding reporting capabilities.  2.a.ii.1 Fraud prevention services include unique security codes tied to each parent/authorized pickup, identifying who the individual is checking children in/out, unique QR Code for each provider that recycles/updates at the start of every day, and specific user permissions only allowing certain provider staff to manually check children in/out (if needed). Please also reference our Security Framework document for additional details.  2.a.iii. Our billing and invoicing features include sending electronic invoices to parents tied to each specific bill period, manual (parent/provider generated) and automatic electronic payment ability (allowing for multiple payment methods and payees for each account), billing ledger tracking, attendance-based billing, recurring/one-time charges/credits, multiple billing cycle options, payment plan options, and third party billing options tied to additional funding sources. All of these features come with corresponding reporting capabilities.  2.a.iv. Our CCIMS has multiple parent engagement features, including instant two-way communication (individual, multiple, entire classroom, or entire center) between parent and provider (via Mobile apps), instant and daily classroom reporting events (via Mobile apps), and various reporting features (both Mobile (Parent App) and Web (Parent Portal)), such as absence reporting. Parents also have the ability to update certain information on their own via the Parent App and/or Parent Portal.  2.a.iv.1. Every parent has their own unique security code to log into either their Parent App or Parent Portal account, and no two accounts can be the same. Our instant two-way communication feature ensures individual communication only between a single parent and the provider staff individual(s) being communicated with. (If the parent is part of a group message and they respond, their response will be private, and no one else will be able to see it except the provider staff individual(s) being communicated with.) Parents always have the ability to edit points of contact and their contact information.  2.a.v. Every child care provider using our CCIMS has access to their own unique Provider Dashboard, which shows real-time enrollment, real-time attendance, real-time staff to child ratios in classrooms, Iron Triangle metrics (including potential and uncollected revenue), various parent/child/provider/staff alerts, and much more.  2.a.vi. Our CCIMS has a robust Documents’ Store function, allowing for electronic management of any and all documents tied to provider, parent, child, and staff. Our system can be customized to accommodate State-specific documents needing to be tracked.  2.a.vii. Our CCIMS has the following features: Parent Correspondence Log, Child Development Notes, Mobile Daily Reporting events (photos, lessons, kudos, etc.) that can include anything provider staff would like to report out to parents about their child on, Child Screenings, and more.  2.a.viii. Our CCIMS offers both a Web and Mobile solution to families and providers.  2.b. Our CCIMS currently has interfaces/integrations with the following systems: Quickbooks Online (QBO), LegUp Enrollment Concierge (sharing enrollment availability, wait list management, and online tour booking), Payroc (third party payment processing company integration), and the State of Colorado’s Child Care Subsidy system (ATS) (not applicable to Indiana, but the possibility to create such an integration with the State of Indiana is there). Our CCIMS features are all designed to save child care providers, networks, and families time with administrative tasks. Individual user access and ability is based on need, and is determined by the child care provider themselves, or the network they are a part of (whoever the managing entity is). This could mean single or multi-site access (for any given user account), with the ability to update/manage data accordingly, based on need. |

1. **Project Management**
   1. Overall Approach and Project Methodology
      1. 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.
   2. Implementation
      1. 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.
      2. 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.
      3. Risk and Issue Management
         1. Describe your company’s risk / issue management processes.

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| 3.a.i. The Early Learning Ventures’ Team recognizes that every child care provider is different with various unique needs. To this end, we customize the client support approach for each child care provider (going off of an ideal onboarding/implementation process we’ve created) to meet their needs and goals. We focus specifically on client support to ensure every child care provider and/or child care provider network is comfortable using our CCIMS to meet their daily operational and administrative needs. All of our clients, regardless of onboarding status or level of use post-onboarding, always have access to our overall Team for any support needs they have.  3.b.i. Please reference our attached ELV Onboarding-Implementation Process document. This is created based on all items our Team would want to train on, and is customized after the first initial introduction meeting with any given child care provider for their specific needs/goals. Our Team works regularly with the child care provider or provider network, having weekly meetings (if not more frequent) to cover the different onboarding/implementation processes that are covered. We essentially move at the pace the provider or provider network is comfortable with.  3.b.ii.1. We have a full Client Support Team that provides support and technical assistance pre-implementation, during implementation, and post-implementation. Each child care provider (or provider network) will be assigned a dedicated Client Support Specialist for their implementation, but will always have access to the rest of the Team for support, if their dedicated person is unavailable (for whatever reason), so continuity of support is always there. We communicate with child care providers (and provider networks) via email, phone, and various online meeting platforms, so our support team is never more than a click or call away. We keep all child care providers regularly informed of where they’re at in their implementation process via these various communications’ options.  3.b.iii. Our Team addresses all potential risks/issues in real-time with each individual client. All issues are either resolved within 48 business hours, or, at the very least, the issue resolution is communicated to the client if the issue will take longer to resolve. Our Team will always respond to issues and resolve them in a timely manner. Anything needing to be moved up the ladder for resolution is done so quickly, so clients can rest assured their feedback is heard and acted upon. |

1. **Customer Support** 
   1. Training, Onboarding, and Ongoing Support
      1. 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.

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| 4.a.i. ELV prides itself on our customer support offerings to all our clients. We offer 1-on-1 training, small group training, large group training, training on site (if travel costs are covered), and Knowledge Base support documents/videos.  4.a.i.1. Please reference our attached ELV Onboarding-Implementation Process document. Our Client Support Team is readily available to support child care providers and provider networks via phone, email, and online meeting platforms. Our Client Support Team is available Monday – Friday, from 8:00am – 8:00pm (EST).  4.a.i.2. Our Team continues to provide ongoing support post-implementation whenever a client needs support. We have a Client Support Call Center and centralized support email that providers can always reach out to if they have any questions or run into any issues. These continued sticking/touch points support and promote provider retention and sustainable business practices when it comes to using a CCIMS. |

1. **Recommended Functions and Services** 
   1. 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.
      1. 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.
      2. Provider Financial Data and Analysis
      3. 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.
      4. 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.
      5. Other Innovative Functions and Services
         1. Please describe any additional functions or services you are able to offer out-of-the-box, if applicable.

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| 5.a.i.1. Our CCIMS allows for child allergy and medical information to be entered in by the child care provider.  5.a.i.2. We do currently have functionality that allows for management of CACFP data (meal and menu building that’s CACFP/USDA compliant, Electronic Record of Meals, Food Program reporting/tracking, income eligibility requirements, reporting out meals served to parents, and more).  5.a.ii. We have various provider level accounting features allowing for evaluation of business sustainability (API with Quickbooks Online (QBO), Iron Triangle metrics, revenue review, tuition management, tax write-off information, and more).  5.a.iii.1. We have some HR functionality current present in our CCIMS (track and calculate staff hours, track staff time off, track staff professional development, health checks, and other requirements, reporting to assist with payroll services, and more). We would be willing and able to customize our HR offerings more, based on State needs.  5.a.iv.1. Our CCIMS is currently offered in both English and Spanish (both Web and Mobile platforms; provider and parent facing)  5.a.iv.2. The language capabilities for our CCIMS were achieved by obtaining direct translation services (not Google Translate) and then hardcoded/integrated into our various platforms (Web and Mobile).  5.a.v. We want to again highlight our robust, customized Client Support offerings to all of our clients. One innovative function of our CCIMS is that we always have the capability to customize our system to suit our clients’ needs. Our system also has the ability to assist with State Licensing support, in that State Licensing officials can use our CCIMS to do a preliminary Licensing check on any child care provider using our system before their actual visit. This helps limit the items they need to check on, and shortens the length of the Licensing visit itself, saving both them and the provider time. |

1. **Data Standards and Interoperability**
   1. As described in Section 3.5, please describe your commitment to allow data exchange from your system to the State.
   2. Describe any experience working with State API compatibility.

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| 6.a. ELV is committed to crafting technological capacity to share relevant data with the State of Indiana via an API. We will coordinate/work with any State agency and system needed to make this possible. (Our system is API compatible.)  6.b. Our CCIMS currently has an API with the Colorado Department of Human Services to pass child care subsidy attendance data from our Alliance CORE system to the State’s system (ATS). This API has been in existence for almost 5 years, so we are very familiar and ready for this requirement. |

1. **Vendor/Provider Contract Structure**
   1. 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.
   2. 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.

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| 7.a. Currently, Early Learning Ventures has provider contract policies that we have implemented and follow in 14 different states. Every individual child care provider has their own agreement that they sign with us. They receive monthly invoices that shows them what their monthly service fee is, and whether or not it’s being funded (paid for) by an outside revenue stream they’re receiving. After the State-funded 2-year period expires, we’ll offer an option to move to a paid platform resource, allowing individual child care providers (or child care networks) access to ELV services and resources. Our Alliance CORE system allows multiple sites to access and manage the billing process in one location, or for a provider hub.  7.b. The beauty of ELV’s strategic model, beyond the initial two-year period, is that we offer lifelong business sustainability through partnership and automation of back-office, administrative support via 1-on-1 consultation, implementation, and technical support. By providing immediate access to a live Client Support Specialist, we have a hands-on approach to quickly resolving any client issues that arise. ELV offers quarterly meetings between all our National partners. We utilize these meetings to identify and build upon the gaps that exist within our network and the National ECE scope. These continuous efforts ensure that utilization of our CCIMS services are fully utilized to the greatest benefit of each individual child care provider or provider network. |

1. **Service Level Agreements (SLAs)**
   1. Provide details and describe SLA for network availability.
   2. Provide details and describe SLAs for incident response. Include how incidents will be handled and communicated to the State.

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| 8.a. Utilizing our server-hosting company (Codero), we are able to quickly respond and resolve most network availability issues within 24 hours (or less).  8.b. Incident response is outlined in our Disaster Recovery Plan (attached). When ELV is notified of an outage that affects the State of Indiana, our Product Manager or backup will notify all State level connections of the outage. |

1. **Security**
   1. 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.

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| 9.a. Our third party server-hosting company (Codero) ensures all data is encrypted. Customer privacy, retention of State-owned data, network security, and disaster recovery are all part of question 8.a. above. Details are outlined in our System Security Framework and Disaster Recovery Plan documents (attached). |