

**SCHOOL BOARD OF BREVARD COUNTY, FLORIDA**

**BOARD AGENDA ITEM – May 24, 2022**

**DEPARTMENT/SCHOOL INITIATED AGREEMENT**

**22-441-A-WH – Online Facilities Rental Storefront**

<input type="checkbox"/> (BW) Bids Waived	<input checked="" type="checkbox"/> (A) Agreement
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**REQUESTOR:** Employee Benefits & Risk Management      **Legal Review Required:**  Yes    No  
**Standard Template Used with No Changes:**  Yes    No  
**Standard Template Type:** N/A

VENDOR NAME	AMOUNT AWARDED	REQUIRED PRODUCTS/SERVICES
Facilitron, Inc.	Variable – Revenue Generating	Online Facilities Rental Storefront

<input type="checkbox"/> <b>Contract Renewal</b>	<b>New Contract Amount</b>	Variable
<input type="checkbox"/> <b>Recurring Contract</b>	<b>Previous Contract Amount</b>	N/A
<input checked="" type="checkbox"/> <b>New Contract</b>	<b>Variance</b>	N/A

**PRICE INCREASE / DECREASE EXPLANATION:** N/A

**DISCUSSION:**

Facility scheduling and reservation is currently a manual process and is very time consuming for the schools and for Risk Management. Risk Management at times may not always be aware of who is using District facilities at any given time which can potentially expose the District to unnecessary risks.

Facilitron is a web-based facility management software system that allows the School Board to manage and track facility use. Schools and community members can go online to search for available facilities, check rates, and make payments. This web-based management software will also manage any invoicing or other recurring payments. Risk Management believes the partnership with Facilitron will relieve school administration and the risk management team of the current manual rental process and streamline facility rentals. Administrative Procedure (ap7510) has been updated to reflect the approved agreement with Facilitron.

A vendor-provided agreement has been used and approved by Legal Services on January 27, 2022.

**CONTRACT TERM:**

The initial contract term shall commence May 25, 2022 and continue until May 24, 2023. Thereafter, this agreement shall continue on a month-to-month basis unless terminated by either party.

**RECOMMENDATION:**

It is the recommendation of Beth Thedy, Ed.D., Deputy Superintendent/Chief Human Resources Officer and Antonia Scipio, Director of Employee Benefits and Risk Management to approve the attached agreement with Facilitron, Inc.

**AUTHORITY FOR ACTION:**

Florida Administrative Code 6A-1.012

**PROCUREMENT & DISTRIBUTION SERVICES  
2700 JUDGE FRAN JAMIESON WAY  
VIERA, FL 32940-6601**

**Brevard Public Schools and Facilitron, Inc.  
Online Facilities Rental Storefront Agreement**

This Online Facilities Rental Storefront Agreement (this "Agreement") is made and entered into as of May 10, 2022 (the "Effective Date"), by and between The School Board of Brevard County, Florida (the "Client"), and Facilitron, Inc., a Delaware corporation (the Company"). The Client and the Company may be referred to herein individually as a "Party" and collectively as the "Parties".

**W I T N E S S E T H**

A. WHEREAS, the Company is the operator of an Internet website that provides its customers with a web storefront for the presentation and rental of facilities; and

B. WHEREAS, the Client desires to present and rent its facilities on a web storefront hosted by the Company ("the "Client Facilities Rental Storefront") upon the terms and subject to the conditions set forth herein;

NOW, THEREFORE, in consideration of the mutual promises contained herein and other good and valuable consideration, the receipt and adequacy of which is hereby acknowledged, the Parties agree as follows:

**A G R E E M E N T**

1. **Definitions.** As used in this Agreement, the following terms, when capitalized, shall have the following meanings:

- (a) **"Company Site"** shall mean the Company's website maintained at [www.facilitron.com](http://www.facilitron.com) and any successor or supplemental locations.
- (b) **"Client Site"** shall mean Client's website maintained at: [www.brevardschools.org](http://www.brevardschools.org) and any successor or supplemental locations.
- (c) **"End Users"** shall mean individuals or outside group representatives as well as any employee, contractor or agent of Client who uses the Online Facilities Rental Storefront to rent Client Facilities.
- (d) **"Client Facilities"** shall mean the facilities that the Client intends to rent.
- (e) **"Online Facilities Rental Storefront"** shall mean the website and e-commerce platform on the Company Site provided to Client by the Company for the purpose of renting Client Facilities to End-Users ([www.facilitron.com/bps32940](http://www.facilitron.com/bps32940) and any successor or supplemental locations).
- (f) **"Services"** shall mean the act of setting up and populating Online Facilities Rental Storefront and Client Facilities for presentation and rental, providing additional offerings facilitating rental transactions, such as liability insurance, taking rental orders, processing of payments and disbursements, and providing customer support.
- (g) **"Transaction"** as used in the Exhibit "A" herein shall mean the total of each reservation that an End-User makes by using the Online Facilities Rental Storefront. For example, if a

reservation is made that includes twenty (20) uses of a Client Facility, the "Transaction" will be the total costs associated with all twenty (20) uses.

## 2. Grant of Rights.

(a) Grant of Rights to Company. The Client hereby grants Company the non-exclusive right to present and rent Client Facilities to End-Users in accordance with the provisions of this Agreement during the Term.

(b) Appointment of the Company as Limited Payment Collection Agent for the Client. The Client hereby appoints Company as the Client's limited payment collection agent solely for the purpose of accepting rental and service payments from End Users. The Client agrees that payment made by an End User through Company, shall be considered the same as a payment made directly to the Client, and the Client will make the facilities and services available to the End User in the agreed-upon manner as if the Client has received the fees. The Client agrees that Company may, in accordance with the cancellation policy selected by the Client (i) permit the End User to cancel the booking and (ii) refund (via Company) to the End User that portion of the fees specified in the applicable cancellation policy. The Client understands that Company accepts payments from End Users as the Client's limited payment collection agent and that Company's obligation to pay the Client is subject to and conditioned upon successful receipt of the associated payments from End Users. In accepting appointment as the limited authorized agent of the Client, the Company assumes no liability for any acts or omissions of the Client.

(c) Pricing and Payment Terms. The Client shall determine the pricing for its facilities rental, application, equipment usage, custodial and other associated services provided by the Client (the "Client Fee"). **The Client agrees to pay the Company a commission of 10% of the total Client Fee amount per Transaction which shall be deducted from the client's payment.** Notwithstanding the foregoing, in no event shall the aggregate fees to be charged to End Users exceed those limits set forth in Florida law or Client's board policies. Company shall remit all collected Client Fee payments for completed rentals minus any applicable commission and any End User refunds by a check to the Client on a monthly basis, and such funds must be sent by Company to Client by the 20<sup>th</sup> day of the following month.

(d) Audit. Upon at least ten (10) calendar days prior written demand to Company, the Client shall have the right, at its own cost and expense, to audit Company's books, records, and accounts for the sole purpose of verifying payments reported under Section 2(c). Company shall provide all such relevant books, records, and accounts to Client upon such demand. If Client (through its certified public accountant or other appropriate auditor) concludes that additional amounts were owed during the audited period, the Company shall pay such additional amounts within thirty (30) calendar days of the date the Client delivers to Company such accounting firm's written report so concluding. The fees charged by such accounting firm shall be paid by the Client; provided, however, if the audit discloses that the payments payable by Company for such period are more than thirty percent (30%) of the amounts actually paid for such period, then the Company shall pay the reasonable fees and expenses charged by such accounting firm in addition to any additional amounts owed.

## 3. Scope of Services.

Company shall be responsible for (a) designing and hosting facility rental websites equipped with rental application and payment processing for each facility, (b) maintaining the websites and calendar to ensure that the sites are functional and usable, (c) providing PCI compliant payment processing, (d) providing account management and customer service personnel as are reasonably necessary to perform, maintain and manage the Services, (e) coordinating all administrative functions associated with the Services, and (f) conducting any other operations reasonably necessary to perform the Services. Company shall comply with all industry standards, any Client rules and regulations concerning the use of Client Facilities, Client's reasonable requests, and all applicable law.

4. Client Obligations.

(a) Solely for purposes of conducting the Services, Client shall use commercially reasonable efforts to assist Company in performing the Services by providing access to its staff, facilities, and updated rental availability data in a timely manner.

(b) The Client shall use commercially reasonable efforts to provide on its website and other communications, at its discretion, instructions, links, and other information to promote the Services therein.

5. No Transfer of Intellectual Property Rights. The Client and the Company acknowledge and agree that no transfer of any proprietary technology, inventions, developments, improvements, art, ideas, art form, or the like, including, but not limited to patents, patent applications, trademarks, copyrights or trade secrets (collectively, "Intellectual Property"), is intended in connection with this Agreement. Each Party's ownership interest in any Intellectual Property owned or licensed by such Party as of the date of this Agreement or acquired by it during the Term of this Agreement is not, and shall not be affected by the terms of this Agreement.

6. Trademarks; Client Marks and Company Marks.

(a) Subject to the terms and conditions of this Agreement, the Client grants Company a nonexclusive, non-transferable, revocable license to use the Client's trademarks ("Client Marks") solely on the Online Facilities Rental Storefront and in connection with any promotions, marketing and press releases relating to the Services contemplated under this Agreement. The Client Marks are, and shall remain, the sole property of Client. Upon termination of this Agreement or of the herein granted license for any reason, the Company shall promptly discontinue use of the Client Marks.

(b) Subject to the terms and conditions of this Agreement, Company grants Client a nonexclusive, non-transferable, revocable license to use the Company's trademarks and servicemarks (the "Company Marks") in connection with marketing rental of the Client Facilities and any related services. The Company Marks are, and shall remain, the sole property of the Company. Client recognizes the Company's title to the Company Marks. Client shall use commercially reasonable efforts not to do or suffer to be done any act or thing which will in any way impair the rights of the Company and to the Company Marks. It is understood that Client shall not acquire and shall not claim any title to the Company Marks adverse to the Company by virtue of the license granted herein, it being the intention of the Parties that use of the Company

Marks by Client shall at all times inure to the benefit of the Company. Upon termination of this Agreement or of the herein granted license for any reason, Client agrees to promptly discontinue use of the Company Marks except that historical records may remain and be subject to internet access and/or public records requests.

7. Privacy Policy.

Company shall ensure that any collection, use of or disclosure of any individual, aggregate and/or personally-identifiable customer data and information about the End Users by Company complies with all applicable laws and regulations, including, but not limited to the Children's Online Privacy Protection Act of 1998 (15 U.S.C. §§ 6501, et seq.), the Family Educational Rights and Privacy Act of 1974 (20 U.S.C. §§ 1232g, et seq.) and related regulations, relevant State law, and with Client's privacy policy and the Company's privacy policy (the "Privacy Policy"). Company shall post throughout the Term of this Agreement, on at least the main page of the Online Facilities Rental Storefront, a copy or link to the Privacy Policy. The Privacy Policy must be prominently published on the web page and provide adequate notice, disclosure and choice to users regarding Company's collection, use and disclosure of user information. Company shall ensure that the Privacy Policy does not create any liability to Client for the use of any customer or user data by either Party in any manner.

8. Confidentiality.

(a) Confidential Information. For purposes of this Agreement, "Confidential Information" shall mean any information disclosed by a Party hereto (the "Disclosing Party") to the other Party ("Recipient"), either directly or indirectly, in writing or by inspection of tangible objects (including without limitation documents, prototypes, samples, plant and equipment), which is designated as "Confidential," "Proprietary" or would reasonably be regarded as being of a confidential nature or, if disclosed orally, is identified as confidential or proprietary at the time of its disclosure to the Recipient or would reasonably be regarded as being of a confidential nature; provided, however, that any information relating to financial, product and business plans and strategies shall be deemed to be Confidential Information whether or not so designated. Notwithstanding the foregoing, Confidential Information shall not include any information which (i) was publicly known and available in the public domain prior to the time of disclosure to the Recipient by the Disclosing Party; (ii) becomes publicly known and available in the public domain after disclosure to the Recipient by the Disclosing Party through no action or inaction of Recipient; (iii) Recipient is able to demonstrate by documentary evidence that the Confidential Information was lawfully in the possession of Recipient at the time of disclosure by the Disclosing Party; (iv) is independently developed by Recipient, provided Recipient can show by documentary evidence that such development was accomplished by or for Recipient without any use or beneficial reference to any Confidential Information of the Disclosing Party; (v) is disclosed pursuant to legal, judicial or administrative proceeding or as otherwise required by law, provided that (A) Recipient gives reasonable prior notice to the Disclosing Party to allow it to seek a protective or similar order preventing or restricting the disclosure of such information, and (B) such information shall be deemed not to be Confidential Information only to the extent that such disclosure is compelled by such proceeding or law and only for the purpose of

complying with such proceeding or law; or (vi) has been approved in writing for disclosure by the Disclosing Party.

(b) **Duty to Hold in Confidence.** Each Recipient agrees that, to the extent permitted by law, it will preserve in strict confidence and secure against accidental loss any Confidential Information disclosed by the Disclosing Party to Recipient. In preserving the Disclosing Party's Confidential Information, Recipient will use the same standard of care it would use to secure and safeguard its own Confidential Information of similar importance, but in no event less than reasonable care. Any permitted reproduction of the Disclosing Party's Confidential Information shall contain all confidential or proprietary legends that appear on the original.

(c) **Permitted Disclosures.** To the extent permitted by law, Recipient shall permit access to the Disclosing Party's Confidential Information solely to its employees, agents and contractors who have a need to know such information for purposes of the Recipient's performance of the Agreement. Except as permitted by law or in the exercise of the rights granted under this Agreement, Recipient shall not disclose or transfer any Confidential Information to any third party, without the specific prior written approval of the Disclosing Party.

(d) **Obligation to Return Confidential Information.** Recipient acknowledges that the Disclosing Party retains ownership of all Confidential Information disclosed or made available to Recipient. Accordingly, upon any termination, cancellation or expiration of this Agreement, or upon the Disclosing Party's request for any reason (other than in violation of this Agreement), Recipient shall return promptly to the Disclosing Party the originals and all copies (without retention of any copy) of any written documents, tools, materials or other tangible items provided by the Disclosing Party to the Recipient containing or embodying Confidential Information.

## 9. Representations and Warranties.

(a) **Client Representations and Warranties.** Client represents and warrants to the Company as of the Effective Date that:

(i) **Authority.** Client has power and authority to execute and deliver this Agreement and to perform its obligations hereunder, and has by all necessary action authorized the execution and delivery of this Agreement and the performance of its obligations hereunder.

(ii) **No Conflicts.** The execution, delivery and performance by Client of this Agreement and each other agreement, document, or instrument now or hereafter executed and delivered by Client pursuant thereto or in connection herewith will not: (A) conflict with or violate any provision of any law, rule, regulation, authorization or judgment of any governmental authority having applicability to Client or its actions; or (B) to the best knowledge of Client, materially conflict with or result in any breach of, or constitute a default under, any note, security agreement, commitment, contract or other agreement, instrument or undertaking to which Client is a party or by which any of its property is bound.

(b) **Company Representations and Warranties.** The Company represents and warrants to Client as of the Effective Date that:

(i) **Corporate Authority.** The Company is a corporation duly organized, validly existing, and in good standing under the laws of the jurisdiction of its incorporation, has

the corporate power and authority to execute and deliver this Agreement and to perform its obligations hereunder, and has by all necessary corporate action authorized the execution and delivery of this Agreement and the performance of its obligations hereunder.

(ii) No Conflicts. The execution, delivery and performance by the Company of this Agreement and each other agreement, document, or instrument now or hereafter executed and delivered by the Company pursuant thereto or in connection herewith will not: (A) conflict with or violate the articles of incorporation or bylaws of the Company or any provision of any law, rule, regulation, authorization or judgment of any governmental authority having applicability to the Company or its actions; or (B) to the best knowledge of the Company, materially conflict with or result in any breach of, or constitute a default under, any note, security agreement, commitment, contract or other agreement, instrument or undertaking to which the Company is a party or by which any of its property is bound.

(iii) Binding Obligation. When executed and delivered by the Company and Client, this Agreement will be valid and legally binding obligation of the Company in accordance with its terms, subject to bankruptcy, reorganization, insolvency, moratorium and similar laws and to general principles of equity which are within the discretion of courts of applicable jurisdiction.

(iv) Confidentiality Agreements. The Company has and will maintain with all the Company employees, agents, and consultants, written agreements sufficient to enable the Company to perform its obligations hereunder with confidentiality terms at least as restrictive as those provided for the Parties under this Agreement.

(v) Non-infringement. The Company represents and warrants that the Company Site and the Online Facilities Rental Storefront do not knowingly infringe any Intellectual Property Rights of any third party.

#### 10. Termination.

(a) Term. The initial term of this Agreement shall be **twelve (12)** months from the Effective Date (the "Term"). Company will be the provider of Client Facilities Rental Storefronts for the Term, unless terminated early per Paragraph 10(b). Thereafter, this Agreement shall continue on a month-to-month basis unless terminated by either Party as set forth in Paragraph 10(c).

(b) Termination for Breach. In the event of a material breach of this Agreement by a Party (the "Breaching Party"), expressly including Company's failure to abide by the payment and reporting terms as set forth in the Agreement, this Agreement may be terminated by the non-breaching Party, effective upon delivery of written notice to the Breaching Party, unless within seven (7) business days after receiving written notice of such breach from the non-breaching Party the Breaching Party cures such breach (or agrees with the non-breaching Party on a plan to cure such breach, which agreement shall not be unreasonably withheld, conditioned or delayed by the non-breaching Party).

(c) Other Termination. Following the Term the Client or Company may terminate this Agreement at any time for any reason without cause. Written notice by the Client shall be sufficient to stop further performance of services by the Company. In the event of early termination, the Company shall be paid for satisfactory work performed to the date of





Telephone: (321) 633-1000

If to the Company:

Chief Executive Officer  
Facilitron, Inc.  
PO Box 1935  
Los Gatos, CA 95031-1935  
Telephone: 800-272-2962

Notice delivered by hand shall be deemed to have been received by the addressee on the date delivered. Notice given by registered or certified mail, return receipt requested, shall be deemed to have been received by the addressee on the date marked on the receipt. Notice given electronically or by confirmed facsimile shall be deemed to have been received by the addressee on the business day following the day on which it was sent.

(f) Entire Agreement. This Agreement and the Exhibits hereto are the complete agreement of the Parties relating to the subject matter hereof. This Agreement supersedes and governs any other prior or collateral agreements with respect to the subject matter hereof. Any amendment to this Agreement or any modification of any term of this Agreement must be in writing and be executed by an authorized officer of each Party.

(g) Governing Law, Dispute Resolution and Exclusive Venue. This Agreement shall be governed by and construed under the laws of the State of Florida, without reference to conflict of laws principles. The parties waive any objection to exclusive jurisdiction and venue in the state and federal courts located in Brevard County, Florida.

(h) Severability. The illegality or unenforceability of the whole or any part of the provisions of this Agreement will not affect the continued operation of the remaining provisions of this Agreement.

(i) Waiver. The failure of either Party at any time to insist upon strict performance of any of the terms and conditions contained in this Agreement will not be deemed a waiver of its right at any time thereafter to insist upon strict performance.

(j) Independent Contractors. The relationship of the Parties established by this Agreement is that of independent contractors, and nothing contained in this Agreement shall be construed to (i) give either Party the power to direct and control the day-to-day activities of the other, (ii) constitute the Parties as partners, joint venturers, co-owners or otherwise as participants in a joint or common undertaking, or (iii) allow either Party to create or assume any obligation on behalf of the other Party for any purpose whatsoever.

(k) Force Majeure. Neither Party to this Agreement shall be held responsible for any failure or delay in performance under this Agreement where such performance is rendered impracticable by any act of war, compliance with laws, governmental acts or regulations, fire, flood, other natural disaster, epidemic, strikes and other causes similar to those listed, in each case where failure to perform is beyond the control, and not caused by the negligence of the non-performing Party ("Force Majeure").

(l) No Third Party Beneficiaries. Unless otherwise expressly provided, no provision of this Agreement are intended or shall be construed to confer upon or give to any person or entity other than the Parties any rights, remedies or other benefits under or by reason of this Agreement.

12. E-Verify. Under Fla. Stat., effective July 1, 2020, Contractor shall use the U.S. Agency of Homeland Security's E-Verify system, <https://e-verify.uscis.gov/emp>, to verify the employment eligibility of all employees hired during the term of this Agreement. Contractor shall also require all subcontractors performing work under this Agreement to use the E-Verify system for any employees they may hire during the term of this Agreement. Contractor must provide evidence of compliance with 448.095, Fla. Stat by January 1, 2021. Evidence may consist of, but is not limited to, providing notice of Contractor's E-Verify number. Failure to comply with this provision is a material breach of the Agreement, and BPS may choose to terminate the Agreement at its sole discretion. Contractor may be liable for all costs associated with BPS securing the same services, inclusive, but not limited to, higher costs for the same services and rebidding costs (if necessary).

13. **PUBLIC RECORDS.**

**IF THE COMPANY HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE BPS CUSTODIAN OF PUBLIC RECORDS AT (321) 633-1000 ext. 11453, [recordsrequest@brevardschools.org](mailto:recordsrequest@brevardschools.org), BREVARD COUNTY PUBLIC SCHOOLS, RECORDS MANAGEMENT, 2700 Judge Fran Jamieson Way, Viera, Florida 32940.**

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed by their representatives thereunto duly authorized as of the date first written above.

"CLIENT"

The School Board of Brevard County, FL

By: \_\_\_\_\_

Name: Misty Belford

Title: Board Chair

Date: \_\_\_\_\_

"COMPANY"

Facilitron, Inc.

By:  \_\_\_\_\_

Name: Mike Kapul

Title: President

Date: March 4, 2022

## Facilitron Statement of Work

Facilitron's contract is a year to year annual agreement with a 30-day notice period to cancel the agreement. All data gathered and stored in the Facilitron platform can be exported should the agreement be cancelled or terminated. The platform is scalable for the current client population and for our extrapolated growth for the next estimated three years.

The Client can report any bugs or issues with the platform directly to their designated Account Manager. The Account Manager will work directly with the appropriate Facilitron team to alert them of the issue and arrange to have the issue resolved or updated as necessary. Any support needs can be directed to the Account Manager by email or phone, or can be sent directly to the Facilitron Support team at [support@facilitron.com](mailto:support@facilitron.com) or by calling us at 800-272-2962.

Facilitron has a unique business model that includes complete account setup, unlimited training, a dedicated Account Manager to assist with the day-to-day workload, 24/7 customer support, and consulting services.

There are no additional fees to include users to the Facilitron platform. Facilitron is able to set up accounts for any users that the client deems necessary for no additional cost.

Facilitron will dedicate Account Management and Customer Support staff to support the client for the entire duration of the contract. The client will have access to the support by phone, email, live-chat or by visiting our support site:

[www.support.facilitron.com](http://www.support.facilitron.com)

The Account Manager will have an ongoing relationship with the client, including regular meetings and interactions with administrative staff to help assist in the day-to-day management of the Facilitron platform. The Account Manager will help to maintain the program and work to include other Facilitron teams for any maintenance updates or additional support that is needed.

Facilitron is a cloud based multi-tier application. The multi-tier infrastructure consists of the client, the application server and the database server. The application and database servers are hosted by Microsoft Azure Platform as a Service. Our platform as a service based model is also backed up to the Amazon Web Services (AWS) infrastructure. Microsoft strives for 100% uptime and provides historical metrics and notification services regarding issues. Additional information can be found [here](#).

Targeted initial response time for severity 1, 2, and 3 level support calls:

Severity 1: Response time within 10 minutes.

Severity 2: Response time within 1 hour.

Severity 3: Response time within 2 hours.

## Facilitron Implementation Overview

Facilitron has extensive experience implementing, training and supporting our Facility Management Platform. Facilitron will work with the client to ensure a seamless transition onto the Facilitron platform, including: account creation and configuration, training, support and ongoing management.

To illustrate Facilitron's expertise and experience in implementation, the Core Implementation phase has been completed in 100% of the school districts of 250 or less schools in less than one month. Second Stage Implementation (staff training, etc) typically goes at the pace at which the client is most comfortable, based on ease of arranging logistics of training schedules.

Facilitron's implementation process is structured as follows:

- I. Core Implementation
  - A. Initial project assessment/planning/artifacts gathering (Core implementation starts)
  - B. Photos and inventory of client facilities
  - C. System configuration & QA
  - D. Initial validation and system update
  - E. Existing/current data migration
  - F. Secondary validation and system update (Core implementation completes)
- II. Second Stage Implementation
  - A. Staff training, including core administrative staff, core site staff and support staff such as head custodians, security officers/Police Department staff, etc.
  - B. Go live

### Project Approach

Facilitron's onboarding process is broken down into three main phases: discovery and configuration, review and training, and ongoing support

#### ***Discovery and Configuration***

During the Core Implementation, Facilitron will conduct an initial project assessment, gather all necessary materials from the client to begin account configuration, and take photos and inventory of campus facilities. Facilitron will then run QA and validation with staff and make any necessary changes. Facilitron will also migrate existing/current data into the platform.

#### ***Review and Training***

During the second stage of implementation, Facilitron will train all staff, including administrative and support staff, such as head custodians, security officers, etc. After training is complete, the system will go live to the community to request facilities.

#### ***Ongoing Support***

Post "Go-live", the client's dedicated Facilitron Account Management and Customer Support teams start to work with staff in developing the facility management program.

The Account Manager works with staff to streamline operations by providing assistance in permits management and facilitating support staff collaboration.

They also provide suggestions for best practices and policy updates to help develop a mature program.

The Customer Support team works with renter groups requesting facility space to manage their accounts, including payment submission, verification of certificate of insurance (COI), verification of non-profit status, any conflict resolution, and other lease/permit related help.

## **Roles and Responsibilities**

There are three (3) types of roles involved in the implementation and ongoing management of the Facilitron platform that will be working directly with the client. Below is a breakdown of each role and their responsibilities over the course of the contract.

- **Project Manager (PM):** The Project Manager will oversee the entire implementation of the Facilitron platform and will be responsible for reporting on the progress, change management, scope change, issue escalation, and the overall progress of the project.
- **Implementation Specialist:** Facilitron's Implementation Specialist is the second in command of the implementation project. The Implementation Specialist handles the photography, account configuration, data ingestion and the relevant QA work.
- **Account Manager:** The Account Manager will work directly with the Project Manager in establishing relationships, communication channels, escalation paths, and conducting training. Post Implementation, the dedicated Account Manager will become the primary point of contact for client staff.

The client will be required to provide Facilitron with access to campuses/sites for photos, all facility management data (including rental fees, service rates, existing permits and internal schedules, site maps, work orders, preventative maintenance schedules, etc.), approval workflows, and a full list of users to be uploaded into the system. Facilitron will be responsible for the complete implementation and account configuration, site photos, data migration, training, and ongoing support.

## **Implementation Timeline**

It typically takes 4 to 6 weeks to complete implementation depending on the number of campuses. The following is the general timeline for an implementation project. The exact timeline can be determined based on the client's needs during the project initiation.

### **1. Week 1**

1. Project Initiation: (1-2 hours)
2. Photographs of facilities: (2 days)
3. Account configuration starts
4. Renter/permit & schedule data exported or transcribed for import.

### **2. Week 2**

1. Initial account configuration completes
2. Renter data ingestion/import completes
3. Permit & schedule data ingestion/import completes

4. Site Demo with client System Administrators: this is a 1-2 hour meeting to demo the client's sites, review workflows across departments, and gather feedback on any configuration updates.
- 3. Week 3**
1. Permit & schedule review with client System Administrators: this is roughly a one hour daily review depending on the System Administrator's availability and configuration and data complexities. During this time, Facilitron's dedicated project manager will review all data imported in the system for inaccuracies and provide continuous training for the key administrative staff.
  2. Account configuration and permit update: any remaining configuration or data updates will be uncovered throughout this week.
- 4. Week 4 - 6**
1. Training for the various groups including site administrators, head custodians and other support staff.
  2. Review and update go-live communication as needed.
  3. Go live

## Reporting Capabilities

Facilitron offers a variety of custom reporting to track bookings, revenue, utilization, renter organizations, and a complete executive summary. All reports in Facilitron are able to be exported to Excel, CSV, and PDF, as well as printed or emailed. Reports can also be filtered for any date/time range. Reports include:

**Revenue Bookings:** Provides a performance overview by site that compares the actual cost recovery with Board Policy based on approved, pending, declined and cancelled reservations.

**Rental Revenue:** A detailed overview of the fees collected, filtered by facility use fees, equipment fees, and additional services. This report can be an overview by site, each individual facility, or even by individual reservations.

**List of Renters:** An overview of each renter organization utilizing client facilities, segmented by the total number of approved and declined reservations, the total amount paid or declined, and all necessary contact information for each organization and user, including group type (i.e. non-profit or commercial). This report allows the client to ensure equity among all renter groups as well as being able to track any problem renters that have been flagged in the system.

**Utilization:** Comprehensive analysis of total facility usage (by hours), filtered by internal staff use, community group use, facility type, campus site, or across the entire organization. If Facilitron conducts a Cost Analysis for the client, the direct cost to operate the facility compared with the total amount paid will also be listed in this report to better understand the cost recovery delta.

Facilitron also provides clients with KPIs that help to provide insight into the efficacy of current policies and practices. These KPIs provide insight into the client's facility use program and help to identify trends to make updates in real-time.

**Executive Summary:** On a quarterly basis, the client's dedicated Facilitron Account Manager will review this data to help draw insights, advise on policy updates, and share best practices.

**Bookings Summary:** The Booking Summary consists of four KPIs that help clients better understand their approval percentages, number of days pending for rental requests, and the demand for use of their facilities. Each of these reports is segmented by campus to better understand how each individual site is addressing facility use requests.

**Rental Revenue Summary:** The Rental Revenue Summary allows clients to analyze renter demographics, revenue generated for each site, and revenue by external groups utilizing their facilities. This report can help to reveal where a majority of rental revenue is being generated and assist with revealing outdated policies.

**Utilization Summary:** The Utilization Summary provides clients with a better understanding of their most used facilities, the number of internal vs. external hours of usage, and equity across external groups in the hours of use as compared to the amount paid for facility rental.

**Operational Cost Analysis:** Facilitron can conduct an Operational Cost Analysis to help the client understand the cost to operate their facilities on a per-hour basis. Facilitron bases this analysis on the client's actual costs, including utilities and staffing, and combining metrics like square footage and amortization.