Education Technology Joint Powers Authority

RFP No. 21/22-01
Facilities and Resource Management
PROPOSAL DEADLINE: October 8, 2021, 12:00pm

Contact: Michelle Bennett, Purchasing Dept.
Education Technology JPA
5050 Barranca Parkway, Irvine, California 92604
Telephone: (949) 936-5022 Fax (949) 936-5219
Email: edtechjpa@iusd.org

All dates subject to change at the sole discretion of Ed Tech JPA. Please continue to check our website throughout the proposal and selection periods for updates.

https://edtechjpa.iusd.org/procurement/open-procurements

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Write out all answers using the Proposal Form in Attachment 1. Additional material may be submitted with the proposal as appendices. No brochures, marketing materials, or internal company documentation will be considered when scoring Proposals. Cross-references to the Proposal Form in additional materials will not be considered responsive. Any additional descriptive material that is used in support of any information in Vendor's proposal must be clearly identified.

MASTER AGREEMENT & PURCHASE AGREEMENT CONFIRMATION

Upon notification of selection and Board Approval by a Participant, the undersigned hereby promises and agrees to furnish all articles or services within the dates specified, in the manner and form and at the prices herein stated in strict accordance with the advertisement, specifications, proposals and general conditions all which are made a part of the Purchase Agreement.

Name under which business is conducted

Facilitron, Inc.

Business Street Address	City	State Zip Code
485 Alberto Way, Suite 220	Los Gatos	CA 95032

Telephone Number:

800-272-2962

IF SOLE OWNER, sign here:
I sign as sole owner of the business named above.

Signature	Date
Name	Title

IF PARTNERSHIP, sign here:
The undersigned certify that we are partners in the business named above and that we sign this purchase agreement with full authority so to do. (One (1) or more partners sign)

Signature	Date
Name	Title

Signature	Date
Name	Title

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 IF CORPORATION, sign here:

The undersigned certify that they sign this purchase agreement with full and proper authorization so to do.

Signature	Date
	October 5, 2021

Corporation Legal Name
Facilitron

Name	Title
Jeff Benjamin	CEO

Incorporated under the laws of the State of

Delaware

EDUCATION TECHNOLOGY
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ACKNOWLEDGEMENT OF AMENDMENTS TO RFP

VENDOR HEREBY ACKNOWLEDGES RECEIPT OF ANY AND ALL AMENDMENTS TO THE RFP.

If Vendor has no knowledge of any amendments to the RFP having been issued to, or received by, Vendor, please check the following box: X

Amendments

Amendment No	Date Published	Date Received

Signature	Date
Kristina Kirkland	October 5, 2021

Vendor Legal Name	
Facilitron, Inc.	

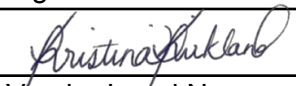| Name	Title
Kristina Kirkland	Director of Marketing

VENDOR REPRESENTATION AND CERTIFICATION

The undersigned hereby acknowledges and affirms that:

• He/she is a duly authorized agent of the Vendor with the authority to submit a Proposal on behalf of the Vendor (corporate or other authorization confirmation may be requested prior to final contract execution).

• He/she has read the complete RFP documents and all amendments issued pursuant thereto.

• The Proposal complies with State conflict of interest laws. The Vendor certifies that no employee of its firm has discussed, or compared the Proposal with any other Vendor or District employee, and has not colluded with any other Vendor or District employee.

• If the Vendor's Proposal is accepted by Ed Tech JPA, the Vendor will enter into a Master Agreement with Participants to provide the Services, Systems and Equipment described by the Proposal on the terms mutually acceptable to Participants and the Vendor.

• Ed Tech JPA reserves the right to reject any or all proposals.

I hereby certify that I am submitting the attached Proposal on behalf of

Facilitron

I understand that, by virtue of executing and returning this required response form with the Proposal, I further certify, that the Vendor understands and does not dispute any of the contents of the proposal requirements (except as may be noted in the response).

Signature	Date
Kristina Kirkland	October 5, 2021

Vendor Legal Name
Facilitron, Inc.

Name	Title
Kristina Kirkland	Director of Marketing

NOTE: If Joint Venture, each member of the joint venture must provide a completed certificate form.

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NONCOLLUSION DECLARATION

TO BE EXECUTED BY VENDOR AND SUBMITTED WITH PROPOSAL
(Public Contract Code section 7106) The undersigned declares:
I am the

CEO

(title) of

Facilitron

(Vendor), the party making the foregoing proposal.

The proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The proposal is genuine and not collusive or sham. The Vendor has not directly or indirectly induced or solicited any other vendor to put in a false or sham proposal. The Vendor has not directly or indirectly colluded, conspired, connived, or agreed with any vendor or anyone else to put in a sham proposal, or to refrain from submitting a proposal. The Vendor has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Vendor or any other vendor, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other vendor. All statements contained in the proposal are true. The Vendor has not, directly or indirectly, submitted its proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, proposal depository, or to any member or agent thereof, to effectuate a collusive or sham proposal, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a Vendor that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the Vendor.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed as follows.

Signature	Date
	October 5, 2021

Vendor Legal Name
Facilitron, Inc.

Name	Title
Jeff Benjamin	CEO

City	State
Los Gatos	CA

CERTIFICATION OF PRIMARY PARTICIPANT REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS

The

CEO

(Principal) of

Facilitron

(Vendor Name)

Certifies to the best of its knowledge and belief that it and its principals:
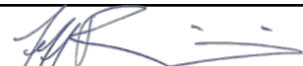
1.   Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency;

2.   Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) transaction or contract under a public transaction; violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

3.   Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state, or local), with commission of any of the offenses enumerated in paragraph (2) of this certification; and

4.   Have not within a three-year period preceding this proposal had one (1) or more public transactions (federal, state or local) terminated for cause or default.

If unable to certify to any of the statements in this certification, the participant shall attach an expiration to this certification.

I HEREBY CERTIFY AND AFFIRM THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTAND THAT THE PROVISIONS OF 31 U.S.C. SECTIONS 3801 ET SEQ. ARE APPLICABLE THERETO.

Signature	Date
	October 5, 2021

Vendor Legal Name
Facilitron, Inc.

Name	Title
Jeff Benjamin	CEO

EDUCATION TECHNOLOGY
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CERTIFICATION OF RESTRICTIONS ON LOBBYING

I hereby certify on behalf of

Facilitron

(name of offeror) that

Facilitron

(Firm name) meets the following qualifications:

1.   No Federal appropriated funds have been paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer of employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

2.   If any funds, other than Federal appropriated funds, have been paid or will be paid to any person for influencing or attempting to Influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit the attached, Standard Form-LLL, "Disclosure of Lobbying Activities", in accordance with its instructions.

3.   The undersigned shall require that the language of this certification be included in all subcontracts, and that all subcontractors shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance is placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to civil penalty of not less than $10,000 and not more than $100,000 for each such failure.

Signature	Date
	October 5, 2021

Vendor Legal Name
Facilitron, Inc.

Name	Title
Jeff Benjamin	CEO

WORKERS' COMPENSATION CERTIFICATE
Labor Code Section 3700.

"Every employer except the state shall secure the payment of compensation in one or more of the following ways:

a.   By being insured against liability to pay compensation in one or more insurers duly authorized to write compensation insurance in this state.

b.   By securing from the Director of Industrial Relations a certificate of consent to self-insure either as an individual employer or as one employer in a group of employers, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his or her employees.

c.   For any county, city, city and county, municipal corporation, public DISTRICT, public agency or any political subdivision of the state, including each member of a pooling arrangement under a joint exercise of powers agreement (but not the state itself), by securing from the Director of Industrial Relations a certificate of consent to self-insure against workers' compensation claims, which certificate may be given upon furnishing proof satisfactory to the director of ability to administer workers' compensation claims properly, and to pay workers' compensation claims that may become due to its employees. On or before March 31, 1979, a political subdivision of the state which, on December 31, 1978, was uninsured for its liability to pay compensation, shall file a properly completed and executed application for a certificate of consent to self-insure against workers' compensation claims. The certificate shall be issued and be subject to the provisions of Section 3702."

I am aware of the provisions of Labor Code Section 3700 which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

Signature	Date
	October 5, 2021

Vendor Legal Name	
Facilitron, Inc.	

Name	Title
Jeff Benjamin	CEO

(In accordance with Article 5 [commencing at Section 1860], Chapter 1, Part 7, Division 2 of the Labor Code, the above certificate must be signed and filed with the awarding body prior to performing any work under the contract.)

DRUG FREE WORKPLACE CERTIFICATION

This Drug-Free Workplace Certification is required pursuant to Government Code §8350, et seq., the Drug-Free Workplace Act of 1990. The Drug-Free Workplace Act of 1990 requires that every person or organization awarded a contract for the procurement of any property or services from any State agency must certify that it will provide a drug-free workplace by doing certain specified acts. In addition, the Act provides that each contract awarded by a State agency may be subject to suspension of payments or termination of the contract and the Vendor may be subject to debarment from future contacting, if the state agency determines that specified acts have occurred.

Pursuant to Government Code §8355, every person or organization awarded a contract from a State agency shall certify that it will provide a drug-free workplace by doing all of the following:
a.   Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in the person's or organization's workplace and specifying actions which will be taken against employees for violations of the prohibition;
b.   Establishing a drug-free awareness program to inform employees about all of the following:
i.   The dangers of drug abuse in the workplace;
ii.   The person's or organization's policy of maintaining a drug-free workplace;
iii.   The availability of drug counseling, rehabilitation and employee-assistance programs;
iv.   The penalties that may be imposed upon employees for drug abuse violations;
c.   Requiring that each employee engaged in the performance of the contract be given a copy of the statement required by subdivision (a) and that, as a condition of employment on the contract, the employee agrees to abide by the terms of the statement.

I the undersigned, agree to fulfill the terms and requirements of Government Code §8355 listed above and will publish a statement notifying employees concerning (a) the prohibition of controlled substance at the workplace, (b) establishing a drug-free awareness program, and (c) requiring that each employee engaged in the performance of the contract be given a copy of statement required by §8355 (a) and requiring that the employee agree to abide by the terms of that statement.

I also understand that if the Participant determines that I have either (a) made false certification herein, or (b) violated this certification by failing to carry out the requirements of §8355, that the contract awarded herein is subject to suspension of payments, termination, or both. I further understand that, should I violate the terms of the Drug-Free Workplace Act of 1990, I may be subject to debarment in accordance with the requirements of §8350, et seq.

I acknowledge that I am aware of the provisions of Government Code §8350, et seq. and hereby certify that I will adhere to the requirements of the Drug-Free Workplace Act of 1990.

Signature	Date
	October 5, 2021

Vendor Legal Name
Facilitron, Inc.

Name	Title
Jeff Benjamin	CEO

TOBACCO USE POLICY

In the interest of public health, Participant provides a tobacco-free environment. Smoking or the use of any tobacco products are prohibited in buildings and vehicles, and on any property owned, leased or contracted for, by the Participant. Failure to abide with this requirement could result in the termination of this contract.

I acknowledge that I am aware of Tobacco Use Policy and hereby certify that I and my employees will adhere to the requirements of the policy.

Signature	Date
	October 5, 201

Vendor Legal Name
Facilitron, Inc.

Name	Title
Jeff Benjamin	CEO

NOTICE TO VENDORS REGARDING CRIMINAL RECORDS CHECK
(EDUCATION CODE §45125.1)

Education Code §45125.1 provides that if the employees of any entity that has a contract with a school DISTRICT may have any contact with pupils, those employees shall submit or have submitted their fingerprints in a manner authorized by the Department of Justice together with a fee determined by the Department of Justice to be sufficient to reimburse the Department for its costs incurred in processing the application.

The Department of Justice shall ascertain whether the individual whose fingerprints were submitted to it has been arrested or convicted of any crime insofar as that fact can be ascertained from information available to the Department. When the Department of Justice ascertains that an individual whose fingerprints were submitted to it has a pending criminal proceeding for a violent felony listed in Penal Code §1192.7(c) or has been convicted of such a felony, the Department shall notify the employer designated by the individual of the criminal information pertaining to the individual. The notification shall be delivered by telephone and shall be confirmed in writing and delivered to the employer by first-class mail.

The contract shall not permit an employee to come in contact with pupils until the Department of Justice has ascertained that the employee has not been convicted of a violent or serious felony. The Vendor shall certify in writing to the Board of Trustees of the school DISTRICT that none of its employees who may come in contact with pupils have been convicted of a violent or serious felony.

Penal Code §667.5(c) lists the following "violent" felonies: murder; voluntary manslaughter; mayhem; rape; sodomy by force; oral copulation by force; lewd acts on a child under the age of 14 years; any felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant inflicts great bodily injury on another; any robbery perpetrated in an inhabited dwelling; arson; penetration of a person's genital or anal openings by foreign or unknown objects against the victim's will; attempted murder; explosion or attempt to explode or ignite a destructive device or explosive with the intent to commit murder; kidnapping; continuous sexual abuse of a child; and carjacking.

Penal Code §1192.7 lists the following : "serious" felonies: murder; voluntary manslaughter; mayhem; rape; sodomy by force; oral copulation by force; a lewd or lascivious act on a child under the age of 14 years; any felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant personally inflicts great bodily injury on another, or in which the defendant personally uses a firearm; attempted murder; assault with intent to commit rape or robbery; assault with a deadly weapon on a peace officer; assault by a life prisoner on a non-inmate; assault with a deadly weapon by an inmate; arson; exploding a destructive device with intent to injure or to murder, or explosion causing great bodily injury or mayhem; burglary of an inhabited dwelling; robbery or bank robbery; kidnapping; holding of a hostage by a person confined in a state prison; attempt to commit a felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant personally uses a dangerous or deadly weapon; selling or furnishing specified controlled substances to a minor; penetration of genital or anal openings by foreign objects against the victim's will; grand theft involving a firearm; carjacking; and a conspiracy to commit specified controlled substances offenses.

CRIMINAL RECORDS CHECK CERTIFICATION BY VENDOR
(AB 1610, 1612 and 2102)

To the Board of Trustees of Participant:

I,

Jeff Benjamin

(name)
certify that:

Facilitron

(Name of Vendor)

1.   has carefully read and understands the Notice to Vendors Regarding Criminal Record Checks (Education Code §45125.1) required by the passage of AB 1610, 1612 and 2102.

2.   Due to the nature of the work it will be performing for the Participant,

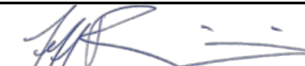| Facilitron |
|---|

(Name of Vendor)
employees may have contact with students of the DISTRICT.

3.   None of the employees who will be performing the work have been convicted of a violent or serious felony as defined in the Notice and in Penal Code §1192.7 and this determination was made by a fingerprint check through the Department of Justice.

I declare under penalty of perjury that the foregoing is true and correct.

Signature	Date
	October 5, 2021

Vendor Legal Name
Facilitron, Inc.

Name	Title
Jeff Benjamin	CEO

City	State
Los Gatos	CA

DISCLOSURE OF PROPOSAL

X I hereby agree to the posting of this **full Proposal** and supporting documents on a password protected website available only to active Ed Tech JPA Members.

OR

I agree to the posting of a **redacted Proposal** and supporting documents on a password protected website available only to active Ed Tech JPA Members.

Signature	Date
	October 5, 2021

Vendor Legal Name	
Facilitron, Inc.	

Name	Title
Jeff Benjamin	CEO

Facilitron W-9 attached on next page.

Form **W-9**

(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer
Identification Number and Certification

▶ Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give Form to the requester. Do not send to the IRS.

Print or type.
See **Specific Instructions** on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

Requester's name and address (optional)

6 City, state, and ZIP code

7 List account number(s) here (optional)

Part I   Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN,* later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

☐☐☐ – ☐☐ – ☐☐☐☐

or

Employer identification number

☐☐ – ☐☐☐☐☐☐☐

Part II   Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and

2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and

3. I am a U.S. citizen or other U.S. person (defined below); and

4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here

Signature of U.S. person ▶

Date ▶ **May 13, 2020**

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9.*

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

• Form 1099-INT (interest earned or paid)

• Form 1099-DIV (dividends, including those from stocks or mutual funds)

• Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)

• Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)

• Form 1099-S (proceeds from real estate transactions)

• Form 1099-K (merchant card and third party network transactions)

• Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)

• Form 1099-C (canceled debt)

• Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, *later.*

Cat. No. 10231X

Form **W-9** (Rev. 10-2018)

Insurance Requirements Acknowledgement

These are the Insurance Requirements for Vendors providing services or supplies to Ed Tech JPA, and its Founding Members and Associate Members. By submitting a proposal, you verify that you comply with and agree to be bound by these requirements. If any additional Contract documents are executed, the actual Insurance Requirements may include additional provisions as deemed appropriate by Ed Tech JPA and the Participant. All insurers must be duly licensed and admitted by the State of California.

Mandatory Requirements (unless Participant reduces or excludes coverage requirements)
1.   Commercial General Liability insurance for bodily injury and property damage, including accidental death in the combined single limit of not less than $1,000,000 per occurrence ($2,000,000 aggregate) and $3,000,000 Excess/Umbrella Liability.

Minimum Limits (If required by Participant)
1.   Workers' Compensation and Employer's Liability insurance in the amount of not less than $1,000,000 per occurrence.

2.   Professional Liability insurance in an amount of not less than $1,000,000 per occurrence ($2,000,000 aggregate). If Professional Liability policy is made on a claims-made basis, the vendor/consultant must purchase and maintain an extending reporting period (tail coverage) for one year.

Any insurance proceeds in excess of the specified limits and coverage required, which are applicable to a given loss, shall be available to Ed Tech JPA or Participant, as applicable. No representation is made that the minimum Insurance requirements of this agreement are sufficient to cover the indemnity or other obligations of the Vendor under this RFP, Master Agreement and Purchase Agreements with Associate Members.

Optional Insurance
Cyber Risk insurance to cover both tangible and intangible property risk of the system and data, as well as third party liability for breaches of security is encouraged, but not required by EdTech JPA. Desired coverage includes: i. Security and privacy liability, including privacy breach response costs, regulatory fines and penalties; ii. Media liability, including infringement of copyright, trademark and trade dress (intellectual property by appearance of product, design, or packaging); iii. Cyber extortion; and iv. Privacy. Suggested limits of not less than $2,000,000 per occurrence, or sufficiently broad to respond to the duties and obligations as is undertaken by the Vendor in this RFP, Master Agreement and Purchase Agreements with Associate Members. The Policy should include, or be endorsed to include, property damage liability coverage for damage to, alteration of, loss of, or destruction of electronic data and/or information "property" of the Agency in the care, custody, or control of the Vendor.

Additional Insured Endorsement Language
"[Participant Name], its Board of Trustees, officers, agents, employees, and volunteers are named as additionally insured on this policy pursuant to written contract, agreement, or memorandum of understanding. Such insurance as is afforded by this policy shall be primary, and any insurance carried by District shall be excess and noncontributory."

Additional Insured Endorsements are required to accompany Certificates of Insurance. Certificate of Insurance shall provide thirty (30) day prior written notice of cancellation.

Additional Required Documents

Certificates of Insurance must be accompanied by a list of all excluded coverages under the general liability and excess/umbrella liability policies. The exclusion policy document section must be provided to Participants. The general liability and excess/umbrella liability documents must list the corresponding policy numbers referenced on the Certificate of Insurance.

Individual Associate Member Requirements

Individual Associate Members may have different/additional requirements than the minimum insurance requirements specified herein. Vendor agrees to maintain insurance that meets the requirements of individual Associate Members.

I hereby agree to the insurance requirements specified herein.

Signature	Date
	October 5, 2021

Vendor Legal Name
Facilitron, Inc.

Name	Title
Jeff Benjamin	CEO

Minimum Price Guarantee Acknowledgment

To prevent underpricing and protect seller Margin, Vendor's pricing shall be subject to a Minimum Price Guarantee (MPG), whereby, Vendor shall agree not to sell directly, or through a reseller, to Ed Tech JPA's Eligible Entities (regardless of whether the Eligible Entity is an Associate Member of the Ed Tech JPA), including all California public school districts, county offices of education, and community college districts, and any other public agency in California whose procurement rules, whether internal rules or rules enacted pursuant to statute, allow them to purchase goods or services through a procurement vehicle such as Ed Tech JPA, the Products(s) subject to the Master Agreement at a price lower than the price offered pursuant to the RFP and the Master Agreement.

During the period of delivery under a contract resulting from this RFP, if the price of an item decreases, Ed Tech JPA Participants shall receive a corresponding decrease in prices on the balance of the deliveries for as long as the lower prices are in effect. Vendor agrees to amend the Master Agreement to reflect the decreased pricing. At no time shall the prices charged to Ed Tech JPA Participants exceed the prices under which the RFP was awarded. Ed Tech JPA Participants shall be given the benefit of any lower prices which may, for comparable quality and delivery, be given by the Vendor to any other school district or any other state, county, municipal or local government agency in a California County for the product(s) listed in the RFP.

I hereby agree to the Minimum Price Guarantee specified herein.

Signature	Date
	October 5, 2021
Vendor Legal Name	
Facilitron, Inc.	
Name	Title
Jeff Benjamin	CEO

Administrative Fee Acknowledgment

VENDOR agrees to pay ED TECH JPA an administrative fee (the "Administrative Fee") calculated as four percent (4%) of the gross invoiced amount of any Participant agreement with VENDOR based on an award under the RFP and all revenue derived directly from any Participant Agreement, including any Additional Services, and agreement extensions or renewals. Vendors whose gross sales exceed two million dollars ($2,000,000.00) may be eligible to pay a discounted Administrative Fee. Computations of the Administrative Fee shall exclude state, local, or federal taxes levied on invoiced amounts. The Administrative Fee must be included when determining the pricing offered. The Administrative Fee is not negotiable and shall not be added as a separate line item on an invoice. The Administrative Fee is not refundable to Participants or Vendors under any circumstances.

I hereby agree to the Administrative Fee specified herein.

Signature	Date
	October 5, 2021

Vendor Legal Name	
Facilitron, Inc.	

Name	Title
Jeff Benjamin	CEO

Rules Acknowledgement

I hereby agree to the Rules specified in Section 6.0 of this RFP.

Signature	Date
	October 5, 2021

Vendor Legal Name	
Facilitron, Inc.	

Name	Title
Jeff Benjamin	CEO

Appendix C: Pricing Form

Detail all costs associated with the proposed Solution, including, but not limited to, complete delivery, the implementation, installation, configuration, software licensing, maintenance, ongoing support, repairs, parts, recommended professional services, taxes and surcharges, and costs of optional services and products. Describe any assumptions made impacting the cost proposal, and any limitations (e.g., professional service hours, number of initial distribution groups) that apply to the listed costs. Costs not identified by the Vendor shall be borne by the Vendor and will not alter the requirements identified in this solicitation.

· One Time Costs
· Annual Recurring Costs
· Optional Services/Solutions and Costs

One-Time Costs: Expand the following table as required to provide pricing for the proposed Solution to meet the requirements specified in this RFP.

Vendor Name:

One-Time Costs			
Item	**Description**	**Unit Cost** *(Indicate Flat Cost or Per Student, Staff, User, etc.)*	**Estimated Total Cost**
Implementation	*Including but not limited to: Data Integration, Transition from Existing Systems, Project Management, Professional Services, Configuration Support, User/Permissions Setup Training (Core IT Staff, District Trainers and Teachers)*	Included	$0
Training	*Including but not limited to: Training Services(Core IT Staff, District Trainers and Teachers), Training Documentation (Electronic and Editable per RFP)*	Included	$0
Other	*Annual Operational Cost Analysis*	Included	$0
Total One-Time Costs:			$0

Annual Recurring Costs: Expand the following tables as required to provide pricing for the proposed system to meet the requirements specified in this RFP. Include Software Upgrade Costs and Maintenance Support and Assurance. Explain any escalation or price change for each year if pricing for each year is not identical. Provide the hourly rate for services not covered by warranty or service contracts. If pricing is different based on quantity of licenses purchased, or any other factor(s), please provide pricing for Tier 1 and Tier 2, along with specifications to qualify for each Tier. If inadequate specifications are made Participants may select which Tier they belong in, to the best of their knowledge.

Tier 1 Annual Recurring Costs			
Specify number of licenses and any additional requirements to qualify for Tier 1 Pricing:		Unlimited users **Scheduling and Reservation Platform ONLY**	
Item	**Examples of Included Items**	**Unit Cost** *(Indicate Flat Cost or Per Student, Staff, User, etc.)*	**Estimated Total Cost** *(Years 1-5)*
Solution	*Including but not limited to: Software, Licensing, training materials and release notes.*	**Included**	*Year 1: $0* *Year 2: $0* *Year 3: $0* *Year 4: $0* *Year 5: $0* *TOTAL:* $0
Maintenance and Support		**Included**	*Year 1: $0* *Year 2: $0* *Year 3: $0* *Year 4: $0* *Year 5: $0* *TOTAL:* $0
Upgrade & Update Costs	*Including but not limited to: Updated training materials and release notes.*	**Included**	*Year 1: $0* *Year 2: $0* *Year 3: $0* *Year 4: $0* *Year 5: $0* *TOTAL:* $0

Transaction Fees/ Customer Revenue	*Describe any fees collected on Customer-generated revenue from the solution (e.g., percentage or flat fee charged based on revenue from a resource reservation by an outside group). Note whether fees are per transaction or a percentage of the total amount charged.*	Service Fee on Facility Rentals with $	*10%*
Other	*Dedicated Account Manager: Assist district/site admins with day-to-day operations, provide additional training and support, additional customization or feature updates, quarterly business reviews (QBRs) with executive leadership*	Included	*Year 1: $0* *Year 2: $0* *Year 3: $0* *Year 4: $0* *Year 5: $0* *TOTAL: $0*
Total Annual Recurring Costs			*Year 1: $0* *Year 2: $0* *Year 3: $0* *Year 4: $0* *Year 5: $0* *TOTAL: $0*

Tier 2 Annual Recurring Costs			
Specify number of licenses and any additional requirements to qualify for Tier 2 Pricing:		**Unlimited users** <u>**Scheduling and Reservation AND Works Platforms**</u>	
Item	**Examples of Included Items**	**Unit Cost** *(Indicate Flat Cost or Per Student, Staff, User, etc.)*	**Estimated Total Cost** *(Years 1-5)*
Solution	*Including but not limited to: Software, Licensing, training materials and release notes.*	**Included**	*Year 1: $0* *Year 2: $0* *Year 3: $0* *Year 4: $0* *Year 5: $0* *TOTAL: $0*

Maintenance and Support		**Included**	*Year 1: $0* *Year 2: $0* *Year 3: $0* *Year 4: $0* *Year 5: $0* *TOTAL:* **$0**
Upgrade & Update Costs	*Including but not limited to: Updated training materials and release notes.*	**Included**	*Year 1: $0* *Year 2: $0* *Year 3: $0* *Year 4: $0* *Year 5: $0* *TOTAL:* **$0**
Transaction Fees/ Customer Revenue	*Describe any fees collected on Customer-generated revenue from the solution (e.g., percentage or flat fee charged based on revenue from a resource reservation by an outside group). Note whether fees are per transaction or a percentage of the total amount charged.*	**Service Fee on Facility Rentals with $**	*14%*
Other	*Dedicated Account Manager: Assist district/site admins with day-to-day operations, provide additional training and support, additional customization or feature updates, quarterly business reviews (QBRs) with executive leadership*	**Included**	*Year 1: $0* *Year 2: $0* *Year 3: $0* *Year 4: $0* *Year 5: $0* *TOTAL:* **$0**
Total Annual Recurring Costs			*Year 1: $0* *Year 2: $0* *Year 3: $0* *Year 4: $0* *Year 5: $0* *TOTAL:* **$0**

Optional Services and Costs: Expand the following table as required to provide pricing for the proposed Solution to meet the requirements specified in this RFP. All costs for functionality in the proposal must be listed in the Optional Services/Solutions if not identified in the previous pricing forms. Costs not identified by the Vendor shall be borne by the Vendor and will not alter the requirements identified in this solicitation.

Optional Services/Solutions and Costs

Item	Description *(Check box if required to meet minimum requirements of this RFP)*	Dependent Requirements *(If required to meet requirements in this RFP, list requirements that are dependent on the Optional Services/Costs OR Future development efforts)*	Unit Cost *(Indicate Flat Cost or Per Student, Staff, User, etc.)*	Estimated Total Cost *(Years 1-5)*
Attendee Management	**Allows event managers to establish a record of visitors to campus facilities through registration, checkin and post-event reporting** ☐ **Required to Meet Requirements**	**Must be using Facilitron's Scheduling & Reservation Platform**	**__X__Recurring** ____One-Time	*Year 1: $0* *Year 2: $0* *Year 3: $0* *Year 4: $0* *Year 5: $0* *TOTAL: $0* __X__Recurring ____One-Time
BAS	**Control BACnet devices automatically with approved reservation requests** ☐ **Required to Meet Requirements**	**Currently in Beta testing, price TBD**	____Recurring ____One-Time	*Year 1: TBD* *Year 2: TBD* *Year 3: TBD* *Year 4: TBD* *Year 5: TBD* *TOTAL: TBD* ____Recurring ____One-Time
	☐ **Required to Meet Requirements**		____Recurring ____One-Time	*Year 1:* *Year 2:* *Year 3:* *Year 4:* *Year 5:* *TOTAL:* ____Recurring ____One-Time

Appendix D: Supplementary Materials

Supplemental Materials
- ● Sample Reports
- ● Training Materials

Additional Resources that Support the Proposal
- ● Resumes of Key Staff

Northside High School

California

January 1, 2019 - January 31, 2019

facilitron

UTILIZATION REPORT

FACILITY TYPE	HOURS	CHARGES	DIRECT COST
Auditorium	133h 35m	$ 0.00	$ 19,671.48
Classroom (30 and Under)	160h 0m	$ 853.32	$ 2,691.20
Classroom - Large (31+)	6h 0m	$ 0.00	$ 100.92
Dance Studio	180h 0m	$ 0.00	$ 3,622.60
Football Field	197h 30m	$ 3,708.00	$ 40,951.63
Gym (Main) - with bleachers	222h 10m	$ 0.00	$ 28,271.60
Gym (Small)	156h 5m	$ 0.00	$ 20,042.67
Large Lecture Hall	259h 50m	$ 427.00	$ 14,373.94
Library	9h 0m	$ 0.00	$ 371.07
Meeting/Conference Room	110h 55m	$ 560.00	$ 4,181.24
Music Room	72h 0m	$ 0.00	$ 1,355.76
Pool	90h 0m	$ 10,431.00	$ 49,651.31
Soccer Field	113h 45m	$ 637.00	$ 11,043.99
Tennis Courts	24h 0m	$ 0.00	$ 681.84
Theater	8h 0m	$ 0.00	$ 1,178.08
Weight Room	45h 30m	$ 0.00	$ 937.30
TOTAL	**1788H 19M**	**$16,616.32**	**$198,126.63**
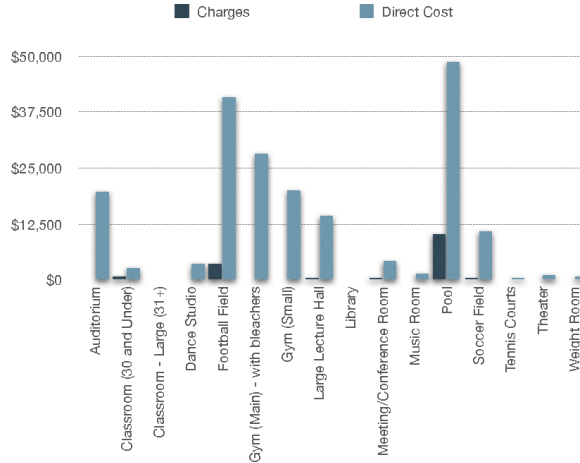
FACILITY	FACILITY TYPE	RENTER	RATE CATEGORY	HOURS	CHARGES	DIRECT COST
Auditorium (Room F110)	Auditorium	Northside High School Andrew Campbell	District Rate (internal)	13h 55m	$0.00	$85.90
Auditorium (Room F110)	Auditorium	Northside High School Vivian Rhone-Lay	District Rate (internal)	3192h 0m	$0.00	$19,585.58

Northside School District

facilitron

California

January 1, 2019 - January 31, 2019

RENTAL REVENUE

FACILITY OWNER	RENT	EQUIPMENT	SERVICES	COMMISSIONS & FEES	SUBMITTED TO OWNER
Ridge Elementary School	$ 190.00	$ 0.00	$ 5,963.50	$ (396.27)	$ 5,757.23
Northside High School	$ 1,650.00	$ 0.00	$ 1,680.00	$ (308.00)	$ 3,022.00
Brooks High School	$ 90.00	$ 0.00	$ 1,100.00	$ (141.70)	$ 1,048.30
Lakeview Elementary School	$ 0.00	$ 0.00	$ 167.00	$ (20.04)	$ 146.96
Basin Creek Middle School	$ 4,640.00	$ 0.00	$ 1,280.00	$ (355.20)	$ 5,564.80
Clarke High School	$ 75.00	$ 0.00	$ 3,744.00	$ (233.64)	$ 3,585.36
Laurel Elementary School	$ 80.00	$ 0.00	$ 232.00	$ (31.20)	$ 280.80
Oak Park School	$ 0.00	$ 0.00	$ 2,654.00	$ (260.78)	$ 2,393.22
Brand Park Middle School	$ 40.00	$ 0.00	$ 174.00	$ (25.68)	$ 188.32
Fruitdale Elementary School	$ 80.00	$ 0.00	$ 0.00	$ (9.60)	$ 70.40
Barton High School	$ 1,004.00	$ 0.00	$ 174.00	$ (138.36)	$ 1,039.64
Independence Elementary School	$ 140.00	$ 0.00	$ 232.00	$ (38.40)	$ 333.60
Brookside Middle School	$ 930.00	$ 0.00	$ 1,798.00	$ (168.16)	$ 2,559.84
Valley Center High School	$ 770.00	$ 0.00	$ 18,966.00	$ (1,289.16)	$ 18,446.84
Bay Haven Middle School	$ 80.00	$ 0.00	$ 232.00	$ (31.20)	$ 280.80
TOTAL	**$ 9,769.00**	**$ 0.00**	**$ 38,396.50**	**$ (3,447.39)**	**$ 44,718.11**

FACILITY OWNER	RENT	EQUIPMENT	SERVICES	COMMISSIONS & FEES	SUBMITTED TO OWNER
Ridge Elementary School	Room 210- Classroom $40.00 Media Center $30.00 PE Covered Area $120.00 Room 138- Classroom $0.00	$ 0.00	Electricity $4,763.50 Custodial Staff $1,200.00	$ (396.27)	$ 5,757.23

Northside School District

facilitron

California

OPERATING COSTS

CURRENT COSTS	BUILDING COSTS	POOL COSTS	STADIUM COSTS	GRASS FIELDS COSTS	HARDTOP COSTS
Utilities	$ 3,386,789	$ 193,530	$ 241,913	$ 967,654	$ 48,382
Maintenance & Repairs	$ 3,144,683	$ 99,966	$ 61,250	$ 245,000	$ 12,250
Custodial Services	$ 8,213,280	$ 231,458	$ 189,642	$ 758,568	$ 37,928
Security	$ 346,731	$ 19,813	$ 24,766	$ 99,066	$ 4,953
Total Operating Costs	$ 15,091,483	$ 544,767	$ 517,571	$ 2,070,288	$ 103,513
Program Costs	$ 360,500	$ 20,600	$ 25,750	$ 103,000	$ 5,150
Annual Capital Replacement Costs	$ 48,944,441	$ 531,330	$ 294,713	$ 15,903,870	$ 4,538,216
Total Facility Costs	$ 64,396,424	$ 1,096,697	$ 838,034	$ 18,077,158	$ 4,646,879
ANNUAL COST/SQUARE FOOT	$17.10	$30.96	$1.59	$1.38	$0.85

COST OF OWNERSHIP	SQUARE FOOTAGE	UNIT	DATA TYPE	DATA SOURCE
Total Building Gross Square Footage	3,764,957	GSF	Actual	School district
Total Pool Square Footage	35,422	GSF	Actual	School district
Total Stadium Square Footage	527,080	GSF	Estimate	School district
Total Grass Field Square Footage	13,084,644	GSF	Estimate	School district
Total Hardtop Square Footage	5,445,859	GSF	Estimate	School district
Current-Year Replace (Indoor)	650	$/GSF	Estimate	Commercial Construction Index
Current-Year Replace (Pool)	300	$/GSF	Estimate	Commercial Construction Index

COST OF OWNERSHIP	SQUARE FOOTAGE	UNIT	DATA TYPE	DATA SOURCE
Current-Year Replace (Stadium)	25	$/GSF	Estimate	Commercial Construction Index
Current-Year Replace (Grass Field)	10	$/GSF	Estimate	Commercial Construction Index
Current-Year Replace (Hardtop)	10	$/GSF	Estimate	Commercial Construction Index
Depreciation Schedule (Indoor)	50	years	Policy	School district
Depreciation Schedule (Pool)	20	years	Policy	School district
Depreciation Schedule (Stadium)	12	years	Policy	School district
Depreciation Schedule (Grass Field)	12	years	Policy	School district
Depreciation Schedule (Hardtop)	12	years	Policy	School district
Total Usable Hours per Year	2,000	hours	Policy	School district
TOTAL				

COST PER HOUR

CURRENT COSTS	AVG SQ/FT	ACTUAL COST/ HR	CURRENT COST/HR
High School Gym	15,000	$ 128.28	$ 50.00
Elementary/Middle School Gym	10,000	$ 85.52	$ 25.00
Theater	20,000	$ 171.04	$ 100.00
Football Stadium	160,000	$ 127.20	$ 80.00
Practice Field	70,000	$ 48.35	$ 5.00
Pool	10,000	$ 154.80	$ 25.00
Multi-Purpose Room	6,000	$ 51.31	$ 12.00
Library	3,500	$ 29.93	$ 10.00

— Actual Cost/HR — Current Cost/HR

EDUCATION TECHNOLOGY
JOINT POWERS AUTHORITY

facilitron

Renter Solutions   Admin Solutions   Work Order Solutions   Support Home   Contact Support

How can we help you today?

Enter your search term...

Enter your search term here...

Search
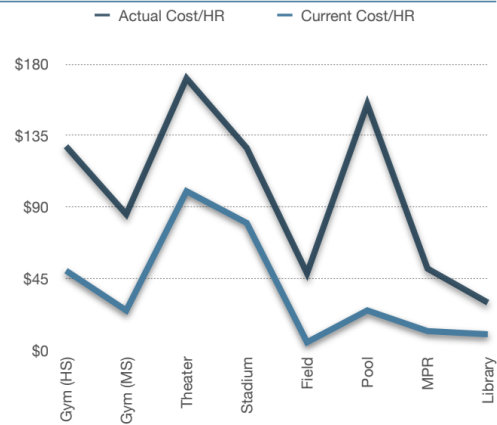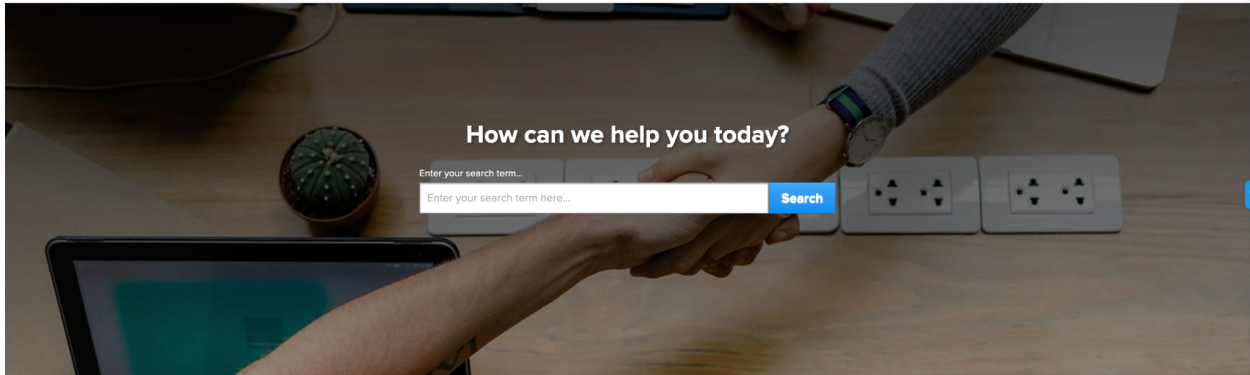
Knowledge base

Renter Solutions

Getting Started for Renters (10)

Requirements For Making A Rental Request

Am I Requesting On Behalf Of An Individual Or An ...

Account Types for Renters

Signing Up / Creating An Account

Making and Managing Reservation Requests (19)

[Video] Making Reservation Requests

How To Search For Facilities

Requesting A Particular School or District

Requesting Multiple Dates Or Facilities

facilitron®   Facility Management Software for Educational Institutions and Municipalities

Attendee Management for District Admins

Review incoming events and approve the reservation. All updates and changes need to be made prior to activating Attendee Management for a reservation.

Once the reservation has been approved, you will be able to create an event using Attendee Management. By clicking "Create Event" you may select parameters for capacity limits, surveys or health screenings, and waitlists. Capacity limits allow you to dictate the total number of attendees, as well as the maximum number of people registered in one party (1 requires contact information for every individual, <1 requires contact information for only one individual in that party)

Kerry Newlin

HEAD OF OPERATIONS

As the Head of Operations, Kerry oversees the entire Implementation, Account Management, Customer Support and PMO teams.   She works to prioritize new contracts with the appropriate Facilitron staff. This ensures the regionalization and resource management for all new and existing Facilitron partners and prospective clients. Kerry also works with the internal teams to optimize and implement LEAN strategies for better work productivity.

BACKGROUND

Kerry hails from a process and audit rich background. Before joining Facilitron, she had a 20+ year career with IBM Global Business Services as a Delivery Project Executive with the concentration on large focus semiconductor and storage companies. While the majority of her career was spent in Executive Account Management, she started her career as an SAP and middleware software engineer. In 2015, Kerry was awarded the prestigious Best of IBM designation. This is only given to 500 IBM employees. She was able to spend a week with the President and Chairman of the Board, Ginni Rometty and IBM's SLT, where she gained valuable experience and insight to strategic corporate management. She also got to meet Desmond Tutu! Kerry thought she was done with the corporate world and would be a stay-at-home mom, but when she saw what Facilitron was doing and how it could help districts gain insight into their operations and help facilitate site rentals, she knew this was something she wanted to be a part of. Kerry's background in software and financial operations supplements the foundational software and adds to the level of service excellence Facilitron provides.

EDUCATION AND CERTIFICATION

BS Business Administration - California State University, Chico

- Concentration in Accounting
- Concentration in Management Information Systems
- Minor in Computer Science

JOB EXPERIENCE

- Head of Operations at Facilitron, Inc
- Software Engineer, Project Manager, Program Manager, Business Area Manager, Delivery Project Executive at IBM Global Business Services
- Software Consultant at SAP America

ABOUT KERRY

Kerry is the mother of three children. She is an avid skier, runner, yogi, SUP and surfer. She is very involved with her children's school's Home and School Clubs and in Los Gatos youth sports.

FACILITRON STATS

At Facilitron for 1.5 years

Introduced LEAN and SDLC methodologies to the operational teams

Oversees Team of 15

OTHER ROLES

Strategy and Business Development

Technical Operations
(BAS, Cost Analysis and BI)

Trade Shows

Client Executive Reviews

Jared Wagman

DIRECTOR OF PRODUCT

As the Director of Product, Jared will oversee the entire implementation and account configuration, as well as any specific product customization or development. Jared will work directly with the development team to ensure a smooth rollout of any additional features or functionality needed by the district.

BACKGROUND

Despite a background and educational path heading towards a career in physical therapy, Jared Wagman saw his destiny side-tracked when Facilitron recruited him to head their newly formed implementation team in 2015. The combination of entrepreneurial pursuit and a passion for project management proved to be too much of a lure and so Jared put other endeavors aside and joined Facilitron. The transition was easy since Jared was familiar with his new Facilitron colleagues having met many of them while still in college and working as a "fan photographer" at Turner Field with the Atlanta Braves. Jared quickly rose to leadership and his affinity towards project management was a perfect fit for a technology company with an operational demands. Thanks to Jared, operations has become one of Facilitron's specialties and now onboarding school districts with over 250 schools in just weeks is routine. Jared now leads an entire team of project managers who travel across the country and work along with our teams in Los Gatos, California and Athens, Georgia to bring on thousands of public spaces to the platform each week.

EDUCATION AND CERTIFICATION

Bachelor of Science - Georgia State University, Atlanta, GA
Certified ScrumMaster (CSM) - Scrum Alliance

JOB EXPERIENCE

- Director of Product at Facilitron
- Director of Implementation at Facilitron
- National Account Manager at AXS
- Director of Operations at Brand Affinity Technologies (BAT)
- Regional Manager of Operations at Printroom.com
- Atlanta Operations Manager at Baseline SportsMedia Inc

ABOUT JARED

Jared is a father of two, competitive triathlete, and a dedicated member of the Facilitron Team. Since he joined the team, Jared has worked to oversee the implementation of over 250 district accounts with more than 5,000 schools. Jared played an integral role in the integration and implementation of Facilitron's Scheduling & Reservation and Maintenance Management Systems.

FACILITRON STATS

At Facilitron for 4 years

Implemented 250 District Accounts

Oversees Team of 11

OTHER ROLES

Product Roadmap Planning

Product Demos

Attends Trade Shows

Jennifer Ford

DIRECTOR OF ACCOUNTS

Jenn assists with managing the Account Management team and oversees some of Facilitron's largest accounts. The Account Management team will be responsible for assisting with the day to day operations of the facility use program, in addition to helping analyze revenue and utilization data, and advise on best practices and policy updates based on the data being tracked on the Facilitron platform.

BACKGROUND

Cultivating strong relationships and leading others in Education has always been a passion of Facilitron Director of Accounts Jenn Ford's career path. After receiving a BA in English and French from UCLA, she landed a job as a bicycle tour guide in France, where she led guests with varying backgrounds and educated them on French culture. Jenn demonstrated her leadership and entrepreneurial skills when she and her husband founded Route du Jour bike Tours. She also spent five years in Public Relations, and later received her Masters in Education and teaching credential. Jenn, played soccer and lacrosse while at UCLA, is married and a mother of two beautiful children who teach her every day to enjoy every moment. Jenn's life experiences have shaped her into a natural leader as a Director of Accounts at Facilitron, where she demonstrates her knowledge and business savviness.

EDUCATION AND CERTIFICATION

Master of Education - National University, San Jose, CA

CLAD Single-Subject Teaching Credential - National University

Bachelor of Arts - UCLA, Los Angeles, CA

JOB EXPERIENCE

- Taught Physical Education - R.J. Middle School, Los Gatos, CA
- Taught English Language Learners and Special Needs Students
- Coached Recreational and Competitive Girls Soccer
- Public Relations Executive - The Hoffman Agency, San Jose, CA
- Bike Tour Owner and Guide - Route Du Jour, Los Gatos CA

ABOUT JENN

Jenn is a mother of two, former teacher and a dedicated account manager on the Facilitron Team. With more than 3 years on the team, Jenn has worked to develop some of our first accounts into mature facility use programs by helping districts make data-driven decisions to update board policies and recover operational costs.

FACILITRON STATS

At Facilitron for 3.5 years

Managing 20 Accounts

Oversees Team of 8

OTHER ROLES

Assists w/ Managing AMs

Product Demos

Attends Trade Shows

Appendix E: Standard Student Data Privacy Agreement (CA-NDPA Standard)

Please complete and sign the CA-NDPA, including Exhibit E, so Ed Tech JPA Members can agree to the same terms.

Ed Tech JPA

and

FACILITRON

This Student Data Privacy Agreement ("DPA") is entered into on   (the "Effective Date") and
is entered into by and between: Education Technology Joint Powers Authority (the **"Local Education
Agency"** or **"LEA")**, located at 5050 Barranca Parkway, Irvine, CA 92604, and Facilitron (the **"Provider")**,
located at 485 Alberto Way, Suite 220, Los Gatos CA 95032.

WHEREAS, the Provider is providing educational or digital services to LEA.

WHEREAS, the Provider and LEA recognize the need to protect personally identifiable student
information and other regulated data exchanged between them as required by applicable laws and
regulations, such as the Family Educational Rights and Privacy Act **("FERPA")** at 20 U.S.C. § 1232g (34
CFR Part 99); the Children's Online Privacy Protection Act ("COPPA") at 15 U.S.C. § 6501-6506 (16 CFR
Part 312), applicable state privacy laws and regulations and

WHEREAS, the Provider and LEA desire to enter into this DPA for the purpose of establishing their
respective obligations and duties in order to comply with applicable laws and regulations.

NOW THEREFORE, for good and valuable consideration, LEA and Provider agree as follows:

1.   A description of the Services to be provided, the categories of Student Data that may be
provided by LEA to Provider, and other information specific to this DPA are contained in the
Standard Clauses hereto.

2.   **Special Provisions. *Check if Required***

_____ X   If checked, the Supplemental State Terms and attached hereto as **Exhibit "G"** are
hereby incorporated by reference into this DPA in their entirety.

_____ X If Checked, the Provider, has signed **Exhibit "E"** to the Standard Clauses, otherwise known as
General Offer of Privacy Terms.

3.   In the event of a conflict between the SDPC Standard Clauses, the State or Special
Provisions will control. In the event there is conflict between the terms of the DPA and any other
writing, including, but not limited to the Service Agreement and Provider Terms of Service or Privacy
Policy the terms of this DPA shall control.

4.   This DPA shall stay in effect for five (5) years. Exhibit E will expire five (5) years from the date
the original DPA was signed.

5.   The services to be provided by Provider to LEA pursuant to this DPA are detailed in **Exhibit "A"**
(the **"Services").**

6.   **Notices.** All notices or other communication required or permitted to be given hereunder may be
given via e-mail transmission, or first-class mail, sent to the designated representatives below.

The designated representative for the LEA for this DPA is:

Name:_ Michelle Bennett_____Title:Procurement Specialist

Address: 5050 Barranca Parkway, Irvine, CA 92604

Phone:_ 949-936-5022_____Email: edtechjpa@iusd.org

The designated representative for the Provider for this DPA is:

Name:_____Title:

Address:

Phone:_____Email:

IN WITNESS WHEREOF, LEA and Provider execute this DPA as of the Effective Date.

LEA: Education Technology Joint Powers Authority
By:_____Date:

Printed Name:___Brianne Ford_____Title/Position:__President

PROVIDER:
By:_____Date: October 5, 2021

Printed Name:___Jeff Benjamin_____Title/Position: CEO

Facilitron does not store any student data.

STANDARD CLAUSES
Version 3.0

ARTICLE I: PURPOSE AND SCOPE

1. **Purpose of DPA.** The purpose of this DPA is to describe the duties and responsibilities to protect Student Data including compliance with all applicable federal, state, and local privacy laws, rules, and regulations, all as may be amended from time to time. In performing these services, the Provider shall be considered a School Official with a legitimate educational interest, and performing services otherwise provided by the LEA. Provider shall be under the direct control and supervision of the LEA, with respect to its use of Student Data

2. **Student Data to Be Provided.** In order to perform the Services described above, LEA shall provide Student Data as identified in the Schedule of Data, attached hereto as **Exhibit "B"**.

3. **DPA Definitions.** The definition of terms used in this DPA is found in **Exhibit "C".** In the event of a conflict, definitions used in this DPA shall prevail over terms used in any other writing, including, but not limited to the Service Agreement, Terms of Service, Privacy Policies etc.

ARTICLE II: DATA OWNERSHIP AND AUTHORIZED ACCESS

1. **Student Data Property of LEA.** All Student Data transmitted to the Provider pursuant to the Service Agreement is and will continue to be the property of and under the control of the LEA. The Provider further acknowledges and agrees that all copies of such Student Data transmitted to the Provider, including any modifications or additions or any portion thereof from any source, are subject to the provisions of this DPA in the same manner as the original Student Data. The Parties agree that as between them, all rights, including all intellectual property rights in and to Student Data contemplated per the Service Agreement, shall remain the exclusive property of the LEA. For the purposes of FERPA, the Provider shall be considered a School Official, under the control and direction of the LEA as it pertains to the use of Student Data, notwithstanding the above.

2. **Parent Access.** To the extent required by law the LEA shall establish reasonable procedures by which a parent, legal guardian, or eligible student may review Education Records and/or Student Data correct erroneous information, and procedures for the transfer of student-generated content to a personal account, consistent with the functionality of services. Provider shall respond in a reasonably timely manner (and no later than forty-five (45) days from the date of the request or pursuant to the time frame required under state law for an LEA to respond to a parent or student, whichever is sooner) to the LEA's request for Student Data in a student's records held by the Provider to view or correct as necessary. In the event that a parent of a student or other individual contacts the Provider to review any of the Student Data accessed pursuant to the Services, the Provider shall refer the parent or individual to the LEA, who will follow the necessary and proper procedures regarding the requested information.

3. **Separate Account.** If Student-Generated Content is stored or maintained by the Provider, Provider shall, at the request of the LEA, transfer, or provide a mechanism for the LEA to transfer, said Student Generated Content to a separate account created by the student.

4. **Law Enforcement Requests.** Should law enforcement or other government entities {"Requesting Party(ies)") contact Provider with a request for Student Data held by the Provider pursuant to the Services, the Provider shall notify the LEA in advance of a compelled disclosure to the Requesting Party, unless lawfully directed by the Requesting Party not to inform the LEA of the request.

5. **Subprocessors.** Provider shall enter into written agreements with all Subprocessors performing functions for the Provider in order for the Provider to provide the Services pursuant to the Service Agreement, whereby the Subprocessors agree to protect Student Data in a manner no less stringent than the terms of this DPA.

ARTICLE III: DUTIES OF LEA

1. **Provide Data in Compliance with Applicable Laws.** LEA shall provide Student Data for the purposes of obtaining the Services in compliance with all applicable federal, state, and local privacy laws, rules, and regulations, all as may be amended from time to time.

2. **Annual Notification of Rights.** If the LEA has a policy of disclosing Education Records and/or Student Data under FERPA {34 CFR § 99.31{a}{l)), LEA shall include a specification of criteria for determining who constitutes a School Official and what constitutes a legitimate educational interest in its annual notification of rights.

3. **Reasonable Precautions.** LEA shall take reasonable precautions to secure usernames, passwords, and any other means of gaining access to the services and hosted Student Data.

4. **Unauthorized Access Notification.** LEA shall notify Provider promptly of any known unauthorized access. LEA will assist Provider in any efforts by Provider to investigate and respond to any unauthorized access.

ARTICLE IV: DUTIES OF PROVIDER

1. **Privacy Compliance.** The Provider shall comply with all applicable federal, state, and local laws, rules, and regulations pertaining to Student Data privacy and security, all as may be amended from time to time.

2. **Authorized Use.** The Student Data shared pursuant to the Service Agreement, including persistent unique identifiers, shall be used for no purpose other than the Services outlined in Exhibit A and/or stated in the Service Agreement and/or otherwise authorized under the statutes referred to herein this DPA.

3. **Provider Employee Obligation.** Provider shall require all of Provider's employees and agents who have access to Student Data to comply with all applicable provisions of this DPA with respect to the Student Data shared under the Service Agreement. Provider agrees to require and maintain an appropriate confidentiality agreement from each employee or agent with access to Student Data pursuant to the Service Agreement.

4. **No Disclosure.** Provider acknowledges and agrees that it shall not make any re-disclosure of any Student Data or any portion thereof, including without limitation, user content or other non-public information and/or Personally Identifiable Information contained in the Student Data other than as directed or permitted in writing by the LEA or this DPA. This prohibition against disclosure shall not apply to aggregate summaries of De-Identified information, Student Data disclosed pursuant to a lawfully issued subpoena or other legal process, or to Subprocessors performing services on behalf of the Provider pursuant to this DPA. Provider will not Sell Student Data to any third party.

5. **De-Identified Data:** Provider agrees not to attempt to re-identify de-identified Student Data. De-Identified Data may be used by the Provider for those purposes allowed under FERPA and the following purposes:

(1) assisting the LEA or other governmental agencies in conducting research and other studies; and (2) research and development of the Provider's educational sites, services, or applications, and to demonstrate the effectiveness of the Services; and (3) for adaptive learning purpose and for customized student learning. Provider's use of De-Identified Data shall survive termination of this DPA or any request by LEA to return or destroy Student Data. Except for Subprocessors, Provider agrees not to transfer de identified Student Data to any party unless (a) that party agrees in writing not to attempt re-identification, and (b) prior written notice has been given to the LEA who has provided prior written consent for such transfer. Prior to publishing any document that names the LEA explicitly or indirectly, the Provider shall obtain the LEA's written approval of the manner in which de-identified data is presented.

6. **Disposition of Data.** Upon written request from the LEA, Provider shall dispose of or provide a mechanism for the LEA to transfer Student Data obtained under the Service Agreement, within sixty (60) days of the date of said request and according to a schedule and procedure as the Parties may reasonably agree. Upon termination of this DPA, if no written request from the LEA is received, Provider shall dispose of all Student Data after providing the LEA with reasonable prior notice. The duty to dispose of Student Data shall not extend to Student Data that had been De-Identified or placed in a separate student account pursuant to Article II section 3. The LEA may employ a "Directive for Disposition of Data" form, a copy of which is attached hereto as **Exhibit "D".** If the LEA and Provider employ Exhibit "D," no further written request or notice is required on the part of either party prior to the disposition of Student Data described in Exhibit "D".

7. **Advertising Limitations.** Provider is prohibited from using, disclosing, or selling Student Data to (a) inform, influence, or enable Targeted Advertising; or (b) develop a profile of a student, family member/guardian or group, for any purpose other than providing the Service to LEA. This section does not prohibit Provider from using Student Data (i) for adaptive learning or customized student learning (including generating personalized learning recommendations); or (ii) to make product recommendations to teachers or LEA employees; or (iii) to notify account holders about new education product updates, features, or services or from otherwise using Student Data as permitted in this DPA and its accompanying exhibits.

ARTICLE V: DATA PROVISIONS

1. **Data Storage.** Where required by applicable law, Student Data shall be stored within the United States. Upon request of the LEA, Provider will provide a list of the locations where Student Data is stored.

2. **Audits.** No more than once a year, or following unauthorized access, upon receipt of a written request from the LEA with at least ten (10) business days' notice and upon the execution of an appropriate confidentiality agreement, the Provider will allow the LEA to audit the security and privacy measures that are in place to ensure protection of Student Data or any portion thereof as it pertains to the delivery of services to the LEA The Provider will cooperate reasonably with the LEA and any local, state, or federal agency with oversight authority or jurisdiction in connection with any audit or investigation of the Provider and/or delivery of Services to students and/or LEA, and shall provide reasonable access to the Provider's facilities, staff, agents and LEA's Student Data and all records pertaining to the Provider, LEA and delivery of Services to the LEA. Failure to reasonably cooperate shall be deemed a material breach of the DPA.

3. **Data Security.** The Provider agrees to utilize administrative, physical, and technical safeguards designed to protect Student Data from unauthorized access, disclosure, acquisition, destruction, use, or modification. The Provider shall adhere to any applicable law relating to data security. The Provider shall implement an adequate Cybersecurity Framework based on one of the nationally recognized standards set forth set forth in **Exhibit "F".** Exclusions, variations, or exemptions to the identified Cybersecurity Framework must be detailed in an attachment to **Exhibit "F".** Additionally, Provider may choose to further detail its security programs and measures that augment or are in addition to the Cybersecurity Framework in **Exhibit "F".** Provider shall provide, in the Standard Schedule to the DPA, contact information of an employee who LEA may contact if there are any data security concerns or questions.

4. **Data Breach.** In the event of an unauthorized release, disclosure or acquisition of Student Data that compromises the security, confidentiality or integrity of the Student Data maintained by the Provider the Provider shall provide notification to LEA within seventy-two (72) hours of confirmation of the incident, unless notification within this time limit would disrupt investigation of the incident by law enforcement. In such an event, notification shall be made within a reasonable time after the incident. Provider shall follow the following process:

(1) The security breach notification described above shall include, at a minimum, the following information to the extent known by the Provider and as it becomes available:

    i.   The name and contact information of the reporting LEA subject to this section.

    ii.   A list of the types of personal information that were or are reasonably believed to have been the subject of a breach.

    iii.   If the information is possible to determine at the time the notice is provided, then either (1)   the date of the breach, (2) the estimated date of the breach, or (3) the date range within which the breach occurred. The notification shall also include the date of the notice.

    iv.   Whether the notification was delayed as a result of a law enforcement investigation, if that information is possible to determine at the time the notice is provided; and

    v.   A general description of the breach incident, if that information is possible to determine at the time the notice is provided.

(2) Provider agrees to adhere to all federal and state requirements with respect to a data breach related to the Student Data, including, when appropriate or required, the required responsibilities and procedures for notification and mitigation of any such data breach.

(3) Provider further acknowledges and agrees to have a written incident response plan that reflects best practices and is consistent with industry standards and federal and state law for responding to a data breach, breach of security, privacy incident or unauthorized acquisition or use of Student Data or any portion thereof, including Personally Identifiable Information and agrees to provide LEA, upon request, with a summary of said written incident response plan.

(4) LEA shall provide notice and facts surrounding the breach to the affected students, parents or guardians.

(5) In the event of a breach originating from LEA's use of the Service, Provider shall cooperate with LEA to the extent necessary to expeditiously secure Student Data.

ARTICLE VI: GENERAL OFFER OF TERMS

Provider may, by signing the attached form of "General Offer of Privacy Terms" (General Offer, attached hereto as **Exhibit "E"**. be bound by the terms of **Exhibit "E"** to any other LEA who signs the acceptance on said Exhibit. The form is limited by the terms and conditions described therein.

ARTICLE VII: MISCELLANEOUS

1. **Termination.** In the event that either Party seeks to terminate this DPA, they may do so by mutual written consent so long as the Service Agreement has lapsed or has been terminated. Either party may terminate this DPA and any service agreement or contract if the other party breaches any terms of this DPA.

2. **Effect of Termination Survival.** If the Service Agreement is terminated, the Provider shall destroy all of LEA's Student Data pursuant to Article IV, section 6.

3. **Priority of Agreements.** This DPA shall govern the treatment of Student Data in order to comply with the privacy protections, including those found in FERPA and all applicable privacy statutes identified in this DPA. In the event there is conflict between the terms of the DPA and the Service Agreement, Terms of Service, Privacy Policies, or with any other bid/RFP, license agreement, or writing, the terms of this DPA shall apply and take precedence. In the event of a conflict between Exhibit H, the SDPC Standard Clauses, and/or the Supplemental State Terms, Exhibit H will control, followed by the Supplemental State Terms. Except as described in this paragraph herein, all other provisions of the Service Agreement shall remain in effect.

4. **Entire Agreement.** This DPA and the Service Agreement constitute the entire agreement of the Parties relating to the subject matter hereof and supersedes all prior communications, representations, or agreements, oral or written, by the Parties relating thereto. This DPA may be amended and the observance of any provision of this DPA may be waived (either generally or in any particular instance and either retroactively or prospectively) only with the signed written consent of both Parties. Neither failure nor delay on the part of any Party in exercising any right, power, or privilege hereunder shall operate as a waiver of such right, nor shall any single or partial exercise of any such right, power, or privilege preclude any further exercise thereof or the exercise of any other right, power, or privilege.

5. **Severability.** Any provision of this DPA that is prohibited or unenforceable in any jurisdiction shall, as to such jurisdiction, be ineffective to the extent of such prohibition or unenforceability without invalidating the remaining provisions of this DPA, and any such prohibition or unenforceability in any jurisdiction shall not invalidate or render unenforceable such provision in any other jurisdiction. Notwithstanding the foregoing, if such provision could be more narrowly drawn so as not to be prohibited or unenforceable in such jurisdiction while, at the same time, maintaining the intent of the Parties, it shall, as to such jurisdiction, be so narrowly drawn without invalidating the remaining provisions of this DPA or affecting the validity or enforceability of such provision in any other jurisdiction.

6. **Governing Law; Venue and Jurisdiction**. THIS DPA WILL BE GOVERNED BY AND CONSTRUED IN ACCORDANCE WITH THE LAWS OF THE STATE OF THE LEA, WITHOUT REGARD TO CONFLICTS OF LAW PRINCIPLES. EACH PARTY CONSENTS AND SUBMITS TO THE SOLE AND EXCLUSIVE JURISDICTION TO THE STATE AND FEDERAL COURTS FOR THE COUNTY OF THE LEA FOR ANY DISPUTE ARISING OUT OF OR RELATING TO THIS DPA OR THE TRANSACTIONS CONTEMPLATED HEREBY.

7. **Successors Bound.** This DPA is and shall be binding upon the respective successors in interest to Provider in the event of a merger, acquisition, consolidation or other business reorganization or sale of all or substantially all of the assets of such business In the event that the Provider sells, merges, or otherwise disposes of its business to a successor during the term of this DPA, the Provider shall provide written notice to the LEA no later than sixty (60) days after the closing date of sale, merger, or disposal. Such notice shall include a written, signed assurance that the successor will assume the obligations of the DPA and any obligations with respect to Student Data within the Service Agreement. The LEA has the authority to terminate the DPA if it disapproves of the successor to whom the Provider is selling, merging, or otherwise disposing of its business.

8. **Authority.** Each party represents that it is authorized to bind to the terms of this DPA, including confidentiality and destruction of Student Data and any portion thereof contained therein, all related or associated institutions, individuals, employees or contractors who may have access to the Student Data and/or any portion thereof.

9. **Waiver.** No delay or omission by either party to exercise any right hereunder shall be construed as a waiver of any such right and both parties reserve the right to exercise any such right from time to time, as often as may be deemed expedient.

EXHIBIT "A"

DESCRIPTION OF SERVICES

[INSERT DETAILED DESCRIPTION OF PRODUCTS AND SERVICES HERE.
IF MORE THAN ONE PRODUCT (RESOURCE) OR SERVICE IS INCLUDED, LIST EACH PRODUCT (RESOURCE) HERE]

EDUCATION TECHNOLOGY
JOINT POWERS AUTHORITY

<u>**EXHIBIT "B"**</u>
SCHEDULE OF DATA

Category of Data	Elements	Check if Used by Your System		
Application Technology Meta Data	IP Addresses of users, Use of cookies, etc.			
	Other application technology meta data- Please specify:			
Application Use Statistics	Meta data on user interaction with application			
Assessment	Standardized test scores			
	Observation data			
	Other assessment data-Please specify:			
Attendance	Student school (daily) attendance data			
	Student class attendance data			
Communications	Online communications captured (emails, blog entries)			
Conduct	Conduct or behavioral data			
Demographics	Date of Birth			
	Place of Birth			
	Gender			

	Ethnicity or race		☐	
	Language information (native, or primary language spoken by student)			
	Other demographic information-Please specify:			
Enrollment	Student school enrollment			
	Student grade level			
	Homeroom			
	Guidance counselor			
	Specific curriculum programs			
	Year of graduation			
	Other enrollment information-Please specify:			
Parent/Guardian Contact Information	Address			
	Email			
	Phone			

Parent/Guardian ID	Parent ID number (created to link parents to students)			
Parent / Guardian Name	First and/or Last			
Schedule	Student scheduled courses			

	Teacher names			
Special Indicator	English language learner information			
	Low income status			
	Medical alerts/ health data			
	Student disability information		☐	
	Specialized education services (IEP or 504)			
	Living situations (homeless/foster care)			
	Other indicator information-Please specify:			
Student Contact Information	Address			
	Email			
	Phone			
Student Identifiers	Local (School district) ID number			
	State ID number			
	Provider/App assigned student ID number			
	Student app username			
	Student app passwords			
Student Name	First and/or Last			

Student In App Performance	Program/application performance (typing program-student types 60 wpm, reading program-student reads below grade level)			
Student Program Membership	Academic or extracurricular activities a student may belong to or participate in			
Student Survey Responses	Student responses to surveys or questionnaires			
Student work	Student generated content; writing, pictures, etc.			
	Other student work data -Please specify:			
Transcript	Student course grades			
	Student course data			
	Student course grades/ performance scores			

	Other transcript data - Please specify:			
Transportation	Student bus assignment			
	Student pick up and/or drop off location			
	Student bus card ID number			
	Other transportation data - Please specify:			

Other	Please list each additional data element used, stored, or collected by your application:			
None	No Student Data collected at this time. Provider will immediately notify LEA if this designation is no longer applicable .			

EXHIBIT *"C:'"* DEFINITIONS

De-Identified Data and De-Identification: Records and information are considered to be de-identified when all Personally Identifiable Information has been removed or obscured, such that the remaining information does not reasonably identify a specific individual, including, but not limited to, any information that, alone or in combination is linkable to a specific student and provided that the educational agency, or other party, has made a reasonable determination that a student's identity is not personally identifiable, taking into account reasonable available information.

Educational Records: Educational Records are records, files, documents, and other materials directly related to a student and maintained by the school or local education agency, or by a person acting for such school or local education agency, including but not limited to, records encompassing all the material kept in the student's cumulative folder, such as general identifying data, records of attendance and of academic work completed, records of achievement, and results of evaluative tests, health data, disciplinary status, test protocols and individualized education programs.

Metadata: means information that provides meaning and context to other data being collected; including, but not limited to: date and time records and purpose of creation Metadata that have been stripped of all direct and indirect identifiers are not considered Personally Identifiable Information.

Operator: means the operator of an internet website, online service, online application, or mobile application with actual knowledge that the site, service, or application is used for K-12 school purposes. Any entity that operates an internet website, online service, online application, or mobile application that has entered into a signed, written agreement with an LEA to provide a service to that LEA shall be considered an "operator" for the purposes of this section.

Originating LEA: A local education agency who originally executes the DPA in its entirety with the Provider.

Provider: For purposes of the DPA, the term "Provider" means provider of digital educational software or services, including cloud-based services, for the digital storage, management, and retrieval of Student Data. Within the DPA the term "Provider" includes the term "Third Party" and the term "Operator" as used in applicable state statutes.

Student Generated Content: The term "student-generated content" means materials or content created by a student in the services including, but not limited to, essays, research reports, portfolios, creative writing, music or other audio files, photographs, videos, and account information that enables ongoing ownership of student content.

School Official: For the purposes of this DPA and pursuant to 34 CFR § 99.31(b), a School Official is a contractor that: (1) Performs an institutional service or function for which the agency or institution would otherwise use employees; (2) Is under the direct control of the agency or institution with respect to the use and maintenance of Student Data including Education Records; and (3) Is subject to 34 CFR § 99.33(a) governing the use and re disclosure of Personally Identifiable Information from Education Records.

Service Agreement: Refers to the Contract and/or Terms of Service and/or Terms of Use.

Student Data: Student Data includes any data, whether gathered by Provider or provided by LEA or its users, students, or students' parents/guardians, that is descriptive of the student including, but not limited to,

information in the student's educational record or email, first and last name, birthdate, home or other physical address, telephone number, email address, or other information allowing physical or online contact, discipline records, videos, test results, special education data, juvenile dependency records, grades, evaluations, criminal records, medical records, health records, social security numbers, biometric information, disabilities, socioeconomic information, individual purchasing behavior or preferences, food purchases, political affiliations, religious information, text messages, documents, student identifiers, search activity, photos, voice recordings, geolocation information, parents' names, or any other information or identification number that would provide information about a specific student. Student Data includes Meta Data. Student Data further includes "Personally Identifiable Information (PII)," as defined in 34 C.F.R. § 99.3 and as defined under any applicable state law. Student Data shall constitute Education Records for the purposes of this DPA, and for the purposes of federal, state, and local laws and regulations. Student Data as specified in **Exhibit "B"** is confirmed to be collected or processed by the Provider pursuant to the Services. Student Data shall not constitute that information that has been anonymized or de-identified, or anonymous usage data regarding a student's use of Provider's services.

Subprocessor: For the purposes of this DPA, the term "Subprocessor" (sometimes referred to as the "Subcontractor") means a party other than LEA or Provider, who Provider uses for data collection, analytics, storage, or other service to operate and/or improve its service, and who has access to Student Data.

Subscribing LEA: An LEA that was not party to the original Service Agreement and who accepts the Provider's General Offer of Privacy Terms.

Targeted Advertising: means presenting an advertisement to a student where the selection of the advertisement is based on Student Data or inferred over time from the usage of the operator's Internet web site, online service or mobile application by such student or the retention of such student's online activities or requests over time for the purpose of targeting subsequent advertisements. "Targeted Advertising" does not include any advertising to a student on an internet web site based on the content of the web page or in response to a student's response or request for information or feedback.

Third Party: The term "Third Party" means a provider of digital educational software or services, including cloud based services, for the digital storage, management, and retrieval of Education Records and/or Student Data, as that term is used in some state statutes. However, for the purpose of this DPA, the term "Third Party" when used to indicate the provider of digital educational software or services is replaced by the term "Provider."

EXHIBIT "D" DIRECTIVE FOR DISPOSITION OF DATA

Provider to dispose of data obtained by Provider pursuant to the terms of the Service Agreement between LEA and Provider. The terms of the Disposition are set forth below:

1. Extent of Disposition

    Disposition is partial. The categories of data to be disposed of are set forth below or are found in

    an attachment to this Directive:

[Insert categories of data here]

    Disposition is Complete. Disposition extends to all categories of data.

2. Nature of disposition

    Disposition shall be by destruction or deletion of data.

    Disposition shall be by a transfer of data. The data shall be transferred to the following site as follows:

[Insert or attach special instructions]

3. Schedule of Disposition

Data shall be disposed of by the following date:

    As soon as commercially
    practicable. By

4. Signature

Authorized Representative of LEA   Date

5. Verification of Disposition of Data

Authorized Representative of Company   10/5/21
                                                        Date

EXHIBIT "E" GENERAL OFFER OF PRIVACY TERMS

1. Offer of Terms

Provider offers the same privacy protections found in this DPA between it and Education Technology joint Powers Authority

("Originating LEA") which is dated _____ , to any other LEA ("Subscribing LEA") who accepts this General Offer of Privacy Terms ("General Offer") through its signature below. This General Offer shall extend only to privacy protections, and Provider's signature shall not necessarily bind Provider to other terms, such as price, term, or schedule of services, or to any other provision not addressed in this DPA. The Provider and the Subscribing LEA may also agree to change the data provided by Subscribing LEA to the Provider to suit the unique needs of the Subscribing LEA. The Provider may withdraw the General Offer in the event of: (1) a material change in the applicable privacy statutes; (2) a material change in the services and products listed in the originating Service Agreement; or five (5) years after the date of Provider's signature to this Form. Subscribing LEAs should send the signed **Exhibit "E"** to Provider at the following email address:

PROVIDER:

By:_____   Date: 10/5/2021

Printed Name:___Jeff Benjamin_____Title/Position: CEO

2. Subscribing LEA

A Subscribing LEA, by signing a separate Service Agreement with Provider, and by its signature below, accepts the General Offer of Privacy Terms. The Subscribing LEA and the Provider shall therefore be bound by the same terms of this DPA for the term of the DPA between the

and the Provider. **PRIOR TO ITS EFFECTIVENESS, SUBSCRIBING LEA MUST DELIVER NOTICE OF ACCEPTANCE TO PROVIDER PURSUANT TO ARTICLE VI, SECTION 5. **

LEA:

BY:_____Date:_____

Printed Name:_____Title/Position:

SCHOOL DISTRICT NAME**:**

DESIGNATED REPRESENTATIVE OF LEA**:**

Name: _____   Title:

Address: _____ Telephone Number:

Email: _____

EXHIBIT "F" DATA SECURITY REQUIREMENTS

Adequate Cybersecurity Frameworks

2/24/2020

The Education Security and Privacy Exchange ("Edspex") works in partnership with the Student Data Privacy Consortium and industry leaders to maintain a list of known and credible cybersecurity frameworks which can protect digital learning ecosystems chosen based on a set of guiding cybersecurity principles* ("Cybersecurity Frameworks") that may be utilized by Provider.

Cybersecurity Frameworks

	MAINTAINING ORGANIZATION/GROUP	FRAMEWORK(S)
☐	National Institute of Standards and Technology	NIST Cybersecurity Framework Version 1.1
☐	National Institute of Standards and Technology	NIST SP 800-53, Cybersecurity Framework for Improving Critical Infrastructure Cybersecurity (CSF), Special Publication 800-171
☐	International Standards Organization	Information technology - Security techniques - Information security management systems (ISO 27000 series)
☐	Secure Controls Framework Council, LLC	Security Controls Framework (SCF)
☐	Center for Internet Security	CIS Critical Security Controls (CSC, CIS Top 20)

	Office of the Under Secretary of Defense for Acquisition and Sustainment (OUSD(A&S))	Cybersecurity Maturity Model Certification (CMMC, ~FAR/DFAR)

Please visit htt p:// www.eds pex.org for further details about the noted frameworks.

*Cybersecurity Principles used to choose the Cybersecurity Frameworks are located here

EXHIBIT "G" Supplemental SDPC State Terms for California

Version 1.0

This Amendment for SDPC State Terms for California **("Amendment")** is entered into on the date of full execution (the **"Effective Date"**) and is incorporated into and made a part of the Student Data Privacy Agreement **("DPA")** by and between: Education Technology Joint Powers Authority, located at 5050 Barranca Parkway, Irvine, CA 92604 (the **"Local Education Agency"** or **"LEA")** and

, located at

(the **"Provider").**

All capitalized terms not otherwise defined herein shall have the meaning set forth in the DPA.

WHEREAS, the Provider is providing educational or digital services to LEA, which services include: (a) cloud-based services for the digital storage, management, and retrieval of pupil records; and/or (b) digital educational software that authorizes Provider to access, store, and use pupil records; and

WHEREAS, the Provider and LEA recognize the need to protect personally identifiable student information and other regulated data exchanged between them as required by applicable laws and regulations, such as the Family Educational Rights and Privacy Act **("FERPA")** at 20 U.S.C. § 1232g (34 C.F.R. Part 99); the Protection of Pupil Rights Amendment **("PPRA")** at 20 U.S.C. §1232h; and the Children's Online Privacy Protection Act **("COPPA")** at 15 U.S.C. § 6501-6506 (16 C.F.R. Part 312), accordingly, the Provider and LEA have executed the DPA, which establishes their respective obligations and duties in order to comply with such applicable laws; and

WHEREAS, the Provider will provide the services to LEA within the State of California and the Parties recognizes the need to protect personally identifiable student information and other regulated data exchanged between them as required by applicable California laws and regulations, such as the Student Online Personal Information Protection Act **("SOPIPA")** at California Bus. & Prof. Code§ 22584; California Assembly Bill 1584 **("AB 1584")** at California Education Code section 49073.1; and other applicable state privacy laws and regulations; and

WHEREAS, the Provider and LEA desire to enter into this Amendment for the purpose of clarifying their respective obligations and duties in order to comply with applicable California state laws and regulations.

NOW, THEREFORE, for good and valuable consideration, LEA and Provider agree as follows:

Term. The term of this Amendment shall expire on the same date as the DPA, <u>unless otherwise terminated by the Parties.</u>

Modification to **Article IV, Section** 7 **of the DPA.** Article IV, Section 7 of the DPA (Advertising Limitations) is amended by deleting the stricken text as follows:

Provider is prohibited from using, disclosing, or selling Student Data to (a) inform, influence, or enable Targeted Advertising; or (b) develop a profile of a student, family member/guardian or group, for any purpose other than providing the Service to LEA. This section does not prohibit Provider from using Student Data ~~(i)~~ for adaptive learning or customized student learning (including generating personalized learning recommendations)~~; or (ii) to make product recommendations to teachers or LEA employees; or (iii) to notify account holders about new~~

education product updates, features, or services or from otherwise using Student Data as permitted in this DPA and its accompanying exhibits.

IN WITNESS WHEREOF, LEA and Provider execute this Amendment as of the Effective Date.

LEA: Education Technology Joint Powers Authority

By: _____   Date: _____

Printed Name:___Brianne Ford_____ Title/Position:___President___

PROVIDER:

By: _____ Date: 10/5/2021

Printed Name:___Jeff Benjamin_____ Title/Position: CEO

Attachment 1: Proposal Form

Contractor Information

Firm/Contractor Name	Facilitron
Primary Contact Name	Kristina Kirkland
Contact Title	Director of Marketing
Contact Email	kristina@facilitron.com
Contact Phone	408-827-1907

Part 1 Vendor Support and Ability to Perform

1.1 Vendor Background/Qualifications:	
Instructions/Overview: Provide a brief description of Vendor's firm(s), as well as any other firms joining with Vendor to provide services.	
History of the firm(s)	Facilitron was established in 2014 and has been partnering with districts across the country to provide an online facility scheduling and reservation system. In 2018, Facilitron acquired Login Logix (formerly Maintenance Login), which has been in use since 2007. Facilitron is an online Facility Management Platform with 14 years of experience implementing, managing, and supporting school districts in 26 states and over 7,000 campuses nationwide. The largest district utilizing the Facilitron System has over 200 schools and serves over 200,000 students. The Facilitron online Facility Management Platform is developed, owned and operated solely by Facilitron Inc., a privately owned Delaware C-Corp with headquarters in Los Gatos, California.
Age of the firm(s)	6 years
Number of employees	55 people
Organizational structure of the firm	C-Corp
Length of time in the industry	14 years
Number of office locations	2 office locations - Los Gatos, CA; Athens, GA; remote team in Southern California
Addresses of all offices	**Headquarters**: 485 Alberto Way, Suite 220, Los Gatos CA 95032 150 West Hancock Avenue, Suite 120, Athens GA 30601

1.2 Vendor Contact(s)	
Instructions/Overview: Provide a list of company contacts. For each provide: name, description of role, detailed experience information and/or resume.	
Contract/sales contact	**Kerry Newlin** - As the Head of Operations, Kerry oversees the entire Implementation, Account Management and Customer Support teams and will work to prioritize new contracts with the appropriate Facilitron staff. Kerry ensures the regionalization and resource management for all new and existing Facilitron partners and prospective clients.
Product manager(s)	**Jared Wagman** - As the Director of Product, Jared will oversee the entire implementation and account configuration, as well as any specific product customization or development. Jared will work directly with the development team to ensure a smooth rollout of any additional features or functionality needed by the district.
Other (specify)	**Jennifer Ford** - Jennifer is the Director of Accounts and oversees the entire Account Management team that will be responsible for helping districts with their day to day operations. Facilitron will dedicate an Account Manager and an Account Support team to work with each district to help with day-to-day tasks, ensure district and school staff feel comfortable using the system, and suggest best practices and policy updates based on districts' real-time data.
*** Please see attached Resumes in Appendix D, pages 34-36 ***	

	Yes	No	Comments
1.3 Confirm that Vendor will meet the minimum insurance requirements specified in Appendix B. List any insurance requirements Vendor will request a waiver for, if chosen as the Selected Vendor. If the Selected Vendor fails to maintain the required insurance coverages, without a waiver approved by Ed Tech JPA and/or Participant staff, Ed Tech JPA and/or Participant may declare Vendor in breach of the Master Agreement and/or Purchase Agreement. **	X		
1.4 Confirm that Vendor maintains cyber insurance.	X		
1.5 Confirm that Vendor will acquire and adhere to any permits, fees, inspections, and construction administrative requirements. Confirm that a copy of all applicable permit applications and, upon issuance, all approved permit(s) shall be provided to the Participant.	X		

**			
1.6 Vendor acknowledges and agrees to all specifications listed in Sections 1 - 6 of this RFP. **	X		
1.7 Vendor certifies that it complies with the Civil Rights Act of 1964, and all applicable Federal and State laws and regulations relating to equal employment opportunity.	X		

1.8 Provide a brief overview of Vendor's technical experience, qualifications, and background in providing and maintaining a facilities and resource management platform and related services for similarly sized K-12 education and/or government customers. Indicate the prior experience of Vendor that is relevant to this contract. Include sufficient detail to demonstrate the relevance of such experience. Please provide specific examples of recently completed K-12 or government projects similar in size, scope and timeline to this project. Proposal should evidence Vendor's awareness of and support for the unique needs of education clients. **

With over 7,000 schools and more than 6 billion square feet of facility space on the platform, Facilitron has processed and supported over 3 million community events since the company was founded in 2015. Experts in facility use management, Facilitron works with organizations across the U.S. including several of the largest K12 school districts in the country—San Diego Unified, Houston ISD, and Hillsborough and Orange County Public Schools in Florida. Facilitron's executive team is experienced in building large-scale technology platforms having previously built e-commerce marketplaces used by professional sports, entertainment and media properties like the NBA, Major League Baseball, Fremantle, USA Today and more.

Facilitron has extensive experience implementing, training and supporting our Facility Management Software. Over the last six (6) years, Facilitron's Implementation Team has implemented over 7,000 schools in 26 states. The largest district utilizing the Facilitron Facility Management Software has over 200 schools and serves more than 200,000 students. The knowledge and expertise distilled from successfully implementing hundreds of projects has allowed our implementation team to create a highly scalable, systematic process that's metrics and result driven. The typical implementation timeline for a district is approximately one month from kick-off to go-live. Facilitron's implementation team has successfully completed all implementation projects within the projected timeline for every district partner on our platform.

1.9   Provide evidence of long-term fiscal stability. Artifacts may include fiscal reports or recent audit results that demonstrate consistent and current financial security. Financial information submitted in response to Section 1.8 will be considered proprietary information.

Facilitron is currently in good financial standing and is happy to provide an Experian Credit Report upon request as evidence of Facilitron's long-term fiscal stability.

1.10   Make a written commitment to make available trained personnel, and software support to fully maintain the Solution for a minimum period of five years from the date of implementation.
Facilitron provides 24/7 account support to our district partners that lasts from initial implementation throughout the entire partnership. Facilitron promises to provide dedicated support and training to all district partners as well as customer support for external community renter groups using district facilities over the course of the entire agreement.

1.11 Subcontractors

1.11.1 Subcontractors Information: Any subcontractors performing services against this agreement must be fully listed and detailed in the proposal submitted by Vendor. State any work proposed to be provided by a subcontractor, and provide evidence of each subcontractor's capability and willingness to carry out the work. For each proposed subcontractor, include:

** Not Applicable, Facilitron does not utilize any subcontractors **	
Firm Name	N/A
Address	N/A
Management contact person	N/A
Complete description of work to be subcontracted	N/A
Descriptive information concerning subcontractor's organization and abilities.	N/A

	Yes	No	Comments
1.11.2 Vendor agrees to bind every subcontractor by the terms and conditions of this RFP, Vendor Proposal and all resulting agreements, including licensing and experience qualifications, as far as such terms and conditions are applicable to the subcontractor(s) work. If Vendor subcontracts any part of this agreement/contract, Vendor shall be fully responsible to the Participant for acts and omissions of its subcontractor and of persons either directly or indirectly employed by Vendor. Nothing contained in these contract documents shall create any contractual			N/A, Facilitorn does not utilize any subcontractors.

	Yes	No	Comments
relation between any subcontractor and Ed Tech JPA or between any subcontractor and the Participant. **			

1.12 References

	Yes	No	Comments
1.12.1 Confirm product is in operational use, actively supported by Vendor in at least five (5) K-12 or government organizations. **	X		

Reference #1	
Organization/Customer Name	San Diego Unified School District
Name, Title & Contact information for company contact	**Tracey Ticknell** - Real Estate Office Supervisor **Phone**: (619) 917-4112 **Email**: ttincknell@sandi.net
Organization/Customer Size - Number of employees/students/licenses	Organization size: 203 schools Number of employees: 15,800 Number of Students: 121,000 Number of Licenses: 1
Implementation length - from contract execution to full implementation	Six Weeks
Installation Date	July 1, 2020
Description of system *include number of locations	Facility use (reservation) system - 203 schools
Vendor Project manager	Jared Wagman

Reference #2	
Organization/Customer Name	Poway Unified School District
Name, Title & Contact information for company contact	**Chad Koster -** Director of Facilities, Maintenance & Operations **Phone**: (858) 774-6701 **Email**: ckoster@powayusd.com
Organization/Customer Size - Number of employees/students/licenses	Organization size: 41 schools Number of employees: 4,490 Number of Students: 36,564 Number of Licenses: 1

Implementation length - from contract execution to full implementation	Five Weeks
Installation Date	March 19, 2018
Description of system *include number of locations	Facility use (reservation) system - 41 schools
Vendor Project manager	Jared Wagman

Reference #3	
Organization/Customer Name	Huntington Beach Union High School District
Name, Title & Contact information for company contact	**Jeff Starr** - Assistant Superintendent, Business Services **Phone**: (714) 903-7000 **Email**: jstarr@hbuhsd.edu
Organization/Customer Size - Number of employees/students/licenses	Organization size: 9 schools Number of employees: 700 Number of Students: 16,000 Number of Licenses: 1
Implementation length - from contract execution to full implementation	Six Weeks
Installation Date	April 16, 2018
Description of system *include number of locations	Facility use (reservation) system - 9 schools
Vendor Project manager	Jared Wagman

Reference #4	
Organization/Customer Name	Conejo Valley Unified School District
Name, Title & Contact information for company contact	**Dr. Victor P. Hayek** - *Deputy Superintendent, Business Services* **Phone:** 805-498-4557 ext. 7502 **Email:** VHayek@conejousd.org
Organization/Customer Size - Number of employees/students/licenses	Organization size: 27 schools Number of employees: 2,050 Number of Students: 18,345 Number of Licenses: 1

Implementation length - from contract execution to full implementation	Five Weeks
Installation Date	August 21, 2017
Description of system *include number of locations	Facility use (reservation) system & Maintenance - 27 schools
Vendor Project manager	Jared Wagman

Reference #5	
Organization/Customer Name	Stockton Unified School District
Name, Title & Contact information for company contact	**Marcus Battle -** Chief Business Official, Business Services **Phone:** (209) 933-7000 **Email:** mbattle@stocktonusd.net
Organization/Customer Size - Number of employees/students/licenses	Organization size: 54 Number of employees: 4,000 Number of Students: 40,000 Number of Licenses: 1
Implementation length - from contract execution to full implementation	Five weeks
Installation Date	November 1, 2016
Description of system *include number of locations	Facility use (reservation) system - 54 schools
Vendor Project manager	Jared Wagman

1.13 Implementation

	Yes	No	Comments
1.13.1 Vendor acknowledges and confirms compliance with all processes and requirements defined in RFP Section 2.00: Purchase Agreement Implementation Process. Identify any exceptions or deviations from the proposed project approach, site access requirements and Vendor expectations. **	X		
1.13.2 Vendor confirms that it will provide Participants with written implementation plans with	X		

specific dates no later than two weeks after receiving notification from Participants unless a later date is agreed to by both parties. Participants will not be required to implement Vendor's Solution until after approving the implementation plan, obtaining Participant Board approval, and upon full execution of the Purchase Agreement. **			
1.13.3 Confirm that Vendor will provide maintenance services, and will not outsource maintenance.	X		
1.13.4 Vendor confirms that its delivery and maintenance employees shall wear distinctive company clothing and display company/employee identification, including the employee photograph and name. Vendor agrees that all Vendor employees who will be on site will adhere to applicable laws and Participants' background check and supervision requirements. All Vendor employees must check in at the administration office of each site prior to any delivery or site work. **	X		
1.13.5 If selected, Vendor will agree to contract language allowing mutual contract termination in whole or in part, in the event that Participant(s) does not allocate funding for the continuation of this contract or any portion thereof. In the event of termination due to non-allocation of funds, both parties shall be held without fault and there shall be no financial consequences assessed as a penalty on either party.	X		

1.13.6 Specify any minimum system requirements that must be in place prior to implementation.
There are no minimum system requirements to operate Facilitron. Facilitron is a cloud-based platform hosted on AWS that only requires internet access to be able to utilize the platform.

1.13.7   Provide a general project plan that includes implementation of the proposed Solution. Include a general outline of essential tasks/milestones and the estimated timeline for implementation. **
Implementation Overview   Facilitron has extensive experience implementing, training and supporting our Facility Management Platform. Facilitron will work with the district 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 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 district 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 district facilities
- C. System configuration & QA
- D. District initial validation and system update
- E. Existing/current data migration
- F. District secondary validation and system update (Core implementation completes)

II. Second Stage Implementation
- A. District staff training, including core district staff, core site staff and support staff such as head custodians, security officers/Police Department staff, etc.
- B. Go live

Implementation Timeline

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

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

- **Week 2**
  - Initial account configuration completes
  - Renter data ingestion/import completes
  - Permit & schedule data ingestion/import completes
  - Site Demo with district System Administrators: this is a 1-2 hour meeting to demo the District's sites, review workflows across departments, and gather feedback on any configuration updates.

- **Week 3**

- ○ Permit & schedule review with district 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 district administrative staff.
  - ○ Account configuration and permit update: any remaining configuration or data updates will be uncovered throughout this week.

- **Week 4 - 6**
  - ○ Training for the various groups including school site administrators, head custodians and other support staff.
  - ○ Review and update go-live communication as needed.
  - ○ Go live

1.13.8 Describe Vendor's proposed project approach, including the roles and responsibilities of project team members, required tasks and any necessary onsite work. Include a detailed list of Participant and Vendor responsibilities during the implementation process. **

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 district to begin account configuration, and take photos and inventory of district facilities. Facilitron will then run QA and validation with district 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 district staff, including district, school site, 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 district's dedicated Facilitron Account Management and Customer Support teams start to work with district staff and site staff in developing the facility management program.

The Account Manager works with district 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 district. 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 the district staff.

The district will be required to provide Facilitron with access to school 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.

1.13.9   Identify examples of Vendor resources/staff that will be assigned to Participants' implementations, including estimated availability and anticipated time commitment, years of experience with the company, and recent projects similar in scope to Participant implementation.

For a complete description of roles and responsibilities, see section above (1.13.8)

During implementation, a team will be assigned to the district to execute the complete implementation and rollout. The district will be assigned a dedicated implementation project manager that will oversee every phase from initiation to completion. Each Project Manager works with a team of Implementation Specialists that assist with photos, account configuration, and data entry. The average project timeline is approximately four to six weeks.

1.13.10 Describe any assumptions or constraints impacting Vendor's project timeline. If any feature or component of the Solution will be phased in on a later timeline (e.g., historical data importing), identify those constraints here. **

The one-month timeline is assuming the district is able to coordinate site review meetings with key stakeholders and schedule training with district and site staff that will be utilizing the platform.

1.13.11   Confirm that the Solution can transfer facilities, open work orders, and resource reservation data from the Participants' current system(s) to the new Solution. If this is limited to specific providers/systems please list those with which this capability exists. Provide information related to the Vendor's transition approach. List any assumptions or conditions that would impact data migration to the Solution from an incumbent system.

Facilitron handles all data migration including facilities, open work orders and resource reservation data from the district's previous system(s) into the Facilitron platform. There are no limitations to the amount of data transferred between the old and new systems. The only condition that would impact the transfer of data would be if the district chooses to keep older "unclean" data stored in the previous system or in an exported file and wishes to start fresh in Facilitron.

1.13.12   Explain any penalty or liability charge for order changes prior to and after installation of the proposed Solution.

There are no additional charges or penalties for any changes made prior to or after going live with the Facilitron platform. If implementation has concluded and changes need to be made, the district can simply contact their dedicated Account Manager who will work with the appropriate Facilitron team members to make any configuration changes.

1.13.13   Vendor confirms that should the awarded Vendor be a new vendor, the Vendor shall coordinate with the previous vendor for implementation of the new Solution. Describe Vendor approach and services supporting customer transitions from incumbent facilities and resource management systems to ensure minimal interruption.

Facilitron will export, transcribe, and load all existing data on behalf of the district. This includes all historical data as well as any current and future data (i.e. upcoming reservations). Implementation is versed in working with any existing format whether this is from a previous vendor, alternate tool, or physical paper form. Facilitron will coordinate with external sources and internal school data sources to ensure complete data transfer with minimal district interruption. When the new system is pushed live, all data will be ready so the district can make a complete cut over without managing multiple systems simultaneously.

1.14 Training

	Yes	No	Comments
1.14.1 Confirm that, if selected, Vendor will provide electronic, editable copies of training materials as well as suggestions for use and best practices as part of the training process.	X		

1.14.2 Provide an overview of the recommended implementation training approach. Describe whether Vendor approaches training through a train-the-trainer approach, turn-key implementation, or other strategy. Be specific about the number of staff that will be directly trained by Vendor personnel under the proposal. Define whether training will be conducted in person, remotely (synchronous) or via on-demand tools. Provide an outline of the proposed training content and sample supporting materials. If different training is available for different elements of the Solution please specify details.**

Training Approach

Facilitron provides turn-key implementation with a training strategy that's a combination of standard training and audience-specific training for most effective training of district staff. Standard training provides the foundation of how to access, navigate the system and perform basic functions. Audience-specific training targets different user groups to highlight functionality based on the targeted user groups' specific functions.

The delivery method of training includes:

1. In-person training conducted live by Implementation/Account Management

2. Webinar training conducted by Implementation/Account Management

3. Training videos

4. Static training materials, digital files and print-outs

Standard training takes about one hour per session. There are typically 30-50 trainees per session. We recommend the initial training to be in person, utilizing webinar trainings for make-up sessions. The Facilitron team will provide as many training sessions as needed and train any number of staff that the district requires.

Audience-targeted training is typically set up for central office administrators, management team/executive staff, finance team, technical support personnel, and operational support staff such as head custodians, HVAC technicians, etc. These training sessions are also one hour each. The Facilitron team will provide as many training sessions as needed.

Post "Go-Live", Facilitron's Account Management team will provide on-going training as needed/requested at no additional cost. For additional training resources, district staff will

be given access to Facilitron's online support site with hundreds of how-to articles, videos, and step-by-step user guides to help supplement any training.

1.14.3 Include a detailed explanation of the training Vendor will provide for site leads/management and system administrators. Please indicate on which functions the system administrator will be trained. **

Site leads/management and system administrators will receive a combination of standard training and audience specific training as outlined above. Facilitron's implementation and account management teams will ensure that these individuals become comfortable using the system to do their day-to-day tasks and have a point of contact to reach out to should they require any additional support.

Facilitron provides a dedicated Account Manager for the district to reach out to with any additional questions or training needs and will serve as the main point of contact for site leads/management and system administrators. Facilitron provides 24/7 account support by phone, email, or online chat, as well as support articles and videos available at support.facilitron.com all at no additional charge.

1.14.4 Include the recommended training approach and associated costs for all users. Provide cost options for direct, Vendor-led training for end-users, train-the-trainer and on-demand/self-paced (video or document tutorials) alternatives.

Facilitron provides unlimited training to each district at no additional cost. Training is included in the pricing model of Facilitron and does not incur any additional fees.

1.14.5 Describe additional system administration and technical training that is available. Please include the projected costs for the training classes, where they are held, who provides them and if and what certifications would be provided if Participant staff completes various levels.

Facilitron can provide additional group or one-on-one training sessions for district staff at no additional cost.

1.14.6 Describe any on-site training/support/assistance during or after implementation, and any costs associated with the training/support/assistance.

Facilitron can provide additional on-site or virtual training/support/assistance during or after implementation at no additional cost. The district can reach out to their dedicated Account Manager to schedule any subsequent training.

1.14.7 Describe available webinars and online training.
Facilitron hosts regular training webinars that can be signed up for at www.facilitron.com/webinars and online training resources at www.support.facilitron.com

1.15 Support and Maintenance

	Yes	No	Comments
1.15.1 Confirm that unlimited support is available through a toll-free phone number and online ticketing system minimally from 6am to 4pm PST (Monday-Friday). **	X		Facilitron offers 24/7 support available by phone, email or online chat.
1.15.2 Confirm emergency after-business-hours support is available for critical issues (site/district outage, data integration failure). **	X		
1.15.3 Confirm that, if selected, Vendor will provide full-time, company-employed customer service professionals who are trained specifically to support the products and configuration recommended for Participant. Please describe the size, work location and organizational structure of the support team. **	X		The district will be assigned a dedicated Account Manager to assist with any support, training, or configuration needs.
1.15.4 Confirm that Vendor does not outsource customer support.	X		
1.15.5 Confirm that Vendor will appoint one point-of-contact for each Participant to act as a company liaison and point of escalation for support and/or platform issues.	X		

1.15.6 Describe standard support hours (24x7x365 preferred). Describe extended and/or emergency support hours. If standard support is not available 24x7x365, describe criteria used and/or limitations on the availability of emergency or escalated support requests.
Facilitron provides 24/7/365 customer support by phone, email, or online chat, as well as support articles and videos available at support.facilitron.com all at no additional charge.

1.15.7 Provide response and resolution times to tickets/reported incidents. Include the severity/type of incident, the average response and resolution time for similar incidents over the past two years and the target and guaranteed response and resolution times included in Vendor's proposal.

Priority 1 and 2 are handled by the Facilitron Customer Success and Product teams; our SLA is as follows:

Targeted initial response time for severity 1 and 2 level support calls:
- Severity 1: Response time within 10 minutes.
- Severity 2: Response time within 1 hour.

1.15.8 Provide data to show the number of support requests, median response time, and customer satisfaction metrics used to evaluate the responsiveness and effectiveness of Vendor's support team.

Facilitron Customer Support Response Metrics
- Support emails = 35 hours response time (average for 2021)
- Phone calls = Average answer time of 19 seconds; Average resolution time of 6 minutes
- Chat = Average response time of 62 seconds; Average resolution time of 10 minutes

1.15.9 Describe the process for submitting support requests. Explain how support requests are tracked. Describe how the original requestor as well as centralized Participant support personnel (IT contact and contract administrator) can access support request history.

Depending on Role (external renter or internal user) there are several different paths. For all users, Facilitron has an email address (support@facilitron.com), a customer success phone number (1-800-272-2962) and a chat that will field questions and open a ticket if necessary. Internal users have the above mentioned avenues to open a ticket, but also have the ability to reach out to their account management team if they are experiencing any issues.
All tickets are tracked through a ticketing system and internal district users can have access to the District's information.

1.15.10 Describe the escalation procedures for issues. Please be specific about when and how an issue may be escalated including:
- Automated triggers based on issue severity,
- Automated triggers based on time-lag to resolution,
- Direct request from the Participant (customer),
- Direct request from Vendor staff (e.g, customer success manager), and/or
- Other event or request.

Facilitron's standard escalation path is:
Submit a ticket via one of the paths listed above in 1.15.9. If the standard path is not sufficient and the issue/incident is affecting a wider population of users/transactions, the client may call

their designated Account Manager. If this does not provide a reasonable path for solution, then the client may reach out to the Head of Operations.

1.15.11 Describe the process for submission, review, escalation and development for new feature requests.

The district can submit feature requests directly to their Account Manager who will route the request through the appropriate Facilitron departments. The Account Manager will keep the district up to date and involved as necessary as the requests are reviewed, vetted and put into production.

1.15.12 Describe systems in place to capture customer feedback and how that feedback is used to inform Vendor's development and organizational priorities.

All feedback can be sent directly to the district Account Manager who can escalate any issues. Feedback will then be evaluated and put into the development roadmap as necessary.

1.15.13 Provide release notes for system upgrades and enhancements over the past two years. If release notes are not available, provide a list of features enhanced or added in that timeframe.

Facilitron implements an in-app alert system that will notify users of upcoming releases, upgrades and feature enhancements. Facilitron can provide historical release notes with a list of feature enhancements and new functionality for the last two years.

1.15.14 Indicate what Vendor defines to be "regular" and "emergency" services, and describe the expected and guaranteed response time for "regular" and "emergency" services.

Facilitron has a priority ticketing system. Priority 3 (P3) to Priority 1 (P1).

Priority 3 (Low) - User related or minor transaction not functioning
Priority 2 (Medium)- Transaction process down, not functioning properly or unable to reach
Priority 1 (High) - System or major business function inoperable

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1.15.15 State what recourse is available if the proposed Solution does not perform as quoted and the Participant is faced with loss or interruption of service.

For severability unenforceability of the whole or any part of the provisions of the contract between Facilitron and the client will not affect the continued operation of the remaining provisions of this Agreement.

1.15.16 Indicate the provisions for service and support if Vendor's business terminates, is subjected to a strike, or shutdown for any reason.
For severability, unenforceability of the whole or any part of the provisions of the contract between Facilitron and the client will not affect the continued operation of the remaining provisions of this Agreement. If "Force Majeure" occurs neither client or Faciltron shall be held responsible for any failure or delay in performance under the contract 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").

Part 2 Technology Requirements

2.1   General

	Yes	No	Planned (P)	Customized (C)	Comments
2.1.1 Confirm that the Solution shall be designed to anticipate and provide for increases in data storage needs, increasing size and scope of data sets on-line, and increasing number of users.**	X				
2.1.2 Confirm that software updates are included in the maintenance contract.	X				

2.1.3 Provide information regarding the Solution database platform and versions supported.
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, Heroku and MongoDB Atlas. All three third-party providers are platform as a service based models hosted on Amazon Web Services (AWS) infrastructure, which guarantees an uptime of 99.999999%. Facilitron's SAAS based solution can be accessed 24/7 through any web-based device, including smart phones, iPads, computers, etc.

2.1.4 Specify whether the Solution is Vendor-hosted (web/cloud-based) or Participant-hosted (on-premise). **

Facilitron is a cloud-based multi-tier application hosted on Amazon Web Services (AWS).

2.1.4.1 If the Solution is on-premise, specify all hardware required to support the Solution.

N/A

2.1.4.2 If the Solution is on-premise, confirm that the Solution can be run in a Virtualized environment (VM Ware, Hyper V).

N/A

2.1.4.3 If the Solution is web/cloud-based, describe what measures have been taken to ensure resiliency/high availability.

Facilitron is a cloud based multi-tier application. The application and database servers are hosted by Microsoft Azure, Heroku and MongoDB Atlas. Both Heroku and Microsoft strive for 100% uptime and provide historical metrics and notification services regarding issues. MongoDB Atlas provides an uptime guarantee of 99.995%.

Since all three service providers are deployed on the AWS infrastructure, that is the underlying SLA, which is a Monthly Uptime Percentage of at least 99.99%. Additional information can be found here.

2.1.4.4 If the Solution is web/cloud-based, describe any browser or application requirements including: supported browsers and minimum versions, dependencies on third-party software. Please note any browser specific limitations to the functionality provided by the Solution.

Facilitron is browser agnostic and supports all major browsers latest, stable releases, but does run most efficiently on Chrome and Firefox.

2.1.5 Provide details regarding Vendor needs and expectations for remote access to systems and open ports required for communication and data exchange between system components.

The base platform of Scheduling and Reservation and Work Orders do not require any remote access or open ports. If integration with a District's system is required, Facilitron's chief architect will work with the District's designated liaison to come up with a suitable architecture.

2.1.6   Describe Vendor process for testing and releasing software updates, and providing for business continuity during major upgrades. Describe expectations of Participant staff to apply upgrades for Solution.

Facilitron follows software best practices for quality assurance. The different stages of testing that we run are: Unit, System, Integration, Regression, and UAT

Faciliton's testing process and strategy comes after the business process and system requirements gathering, which is an as-is / to-be (current state / future state) process documentation. ease of test case creation and documentation for all levels of testing (Unit through UAT). Testing is conducted in a stand alone system and all defects are documented and resolved or scheduled for a future release depending on priority, scope and implementation schedule.

2.1.7 Describe the typical frequency of software updates on an annual basis and whether software updates are required at these intervals or if they are included/or optional. Describe how Participants are notified of new software upgrades and tools available.

Facilitron provides ongoing routine updates to the system and will occasionally add new features or functionality that is available to the district for no additional cost. The district has the option to adopt or use these new features or can continue with their current system and processes. Facilitron has an in-platform alert system that will notify administrators of upgrades, tools, and new functionality. The district's dedicated Account Manager will also work with staff to notify them of any upcoming changes or functionality.

2.2 Performance and Reliability

2.2.1   Describe performance monitoring or other tools/techniques used to ensure consistent response times and availability of the Solution.

We have worked very diligently with our database vendors and our in-house engineers to proactively define alerts if there are any infrastructure issues. Our engineering team monitors logs and emails to ensure that the database and platform architecture is running at optimal performance. They will fine tune and/or address any issue proactively as they see it come up in the logs.

2.2.2   Describe Vendor recommended/used database backup, system recovery, and failover capabilities to minimize the system downtime and risk of data loss.

Disaster and Recovery Plan

Facilitron is a cloud based multi-tier application. The application and database servers are hosted by Microsoft Azure, Heroku and MongoDB Atlas. Our platform as a service based model is also backed up to the Amazon Web Services (AWS) infrastructure. Microsoft,

Heroku and MongoDB strive for 100% uptime and provide historical metrics and notification services regarding issues.

The hosting providers deploy redundancy and dynamic deployment strategies to mitigate disasters. For the application server tier, we deploy a multi-dyno infrastructure to retain availability during any catastrophic events. Additional information regarding the Heroku environment can be found here under the "Disaster Recovery'' section. For the database server tier, the replica-set infrastructure of MongoDB provides high availability and redundancy during any catastrophic events. Additional information regarding the MongoDB Atlas business continuity plan can be found here.

2.2.3   State uptime for the Solution for the past three (3) years. Scheduled maintenance that renders the Solution unavailable for typical usage, should be counted as an outage. Describe process for maintenance, including communications and Solution availability during scheduled maintenance. Define uptime commitments included in Vendor's service level agreement.**

Facilitron's platform has a 99.99% uptime. Maintenance for sprint or code release does not incur downtime. Scheduled database modification, which is very infrequent, could potentially incur downtime, this is done over the weekend. Most communication is delivered via system alerts by the platform communication vehicle, Beamer and through email communications from our operations teams.

2.2.4   Provide a list of any site-wide outages over the past two years. Include the duration of the outage and an impact statement listing the services affected.**

No, Facilitron has not had any site-wide outages.

2.2.5   Describe any data loss or data corruption that occurred in the past three (3) years. Identify any customers that experienced lost or compromised data and the source of the issue.

To date, Facilitron has not incurred any data loss or corruption. We do proactively practice disaster recovery steps.

2.2.6   Describe Vendor support for disaster recovery of the complete Solution in the instance of data corruption, complete data failure, complete server failure, or complete site failure. Provide evidence of comprehensive disaster recovery planning.

See Disaster Recovery plan from 2.2.2

2.2.7   Describe how Vendor anticipates and provides for increases in data storage needs, increasing size and scope of data sets on-line, and increasing number of users. Provide an overview of how Vendor scales both infrastructure and support personnel to meet necessary demand.

Facilitron has a dynamically scalable environment that is constantly being monitored for performance and size capacities. Our data warehousing and archiving strategies ensure that we keep the platform at optimal performance.

2.2.8   If on-premise installation is recommended, provide all technical documentation including minimum requirements, database sizing recommendations, and Solution architecture and installation.

N/A

2.3 Upgrades and Maintenance

2.3.1 Confirm anticipated Solution availability (ideally 24/7, 365 days per year). Provide details related to scheduled maintenance windows and precautions taken to minimize service disruption due to planned maintenance.**

The Facilitron platform is available 24/7, 365 days per year. Any scheduled maintenance will be communicated prior to any interruption in service; scheduled maintenance generally occurs on Friday afternoons so as not to interrupt any weekday workflows.

2.3.2   Clarify whether Vendor will host dedicated, separate production, test and training environments for Participants under this agreement. Participants may request a testing database that is refreshed nightly from production data, where new releases can be previewed and modifications tested prior to application to production. A training database should provide a de-identified/scrambled data set for use in conducting training and developing internal training documents.

Faciliton's path to production includes a Demo/Sandbox site, a QA site, an Integration site and a Production site.

2.3.3   If a dedicated, separate test environment is not provided as part of the Solution, describe Vendor's recommended strategy for safely applying and testing configuration changes and/or large-scale data changes (e.g., modifying an import file).

N/A please see answer in 2.3.2

2.3.4   Provide details on maintenance service arrangements for the proposed Solution and the cost for any alternative available including maintenance contracts and per-call maintenance cost.
Per our contract, implementation, account management and our customer success team does not incur an extra service cost.

2.4 Data and Interoperability

	Yes	No	P	C	Comments
2.4.1 Confirm that the Solution utilizes common standards for data integration and interoperability.	X				

2.4.2   Participants require full access to extract user-generated, system and usage data. Please describe how Vendor's proposed Solution supports this requirement. **
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.

2.4.3   Please specify which platforms Vendor's proposed Solution integrates with for authentication/authorization (Active Directory, One Directory, Google Single Sign On, etc.). **
Facilitron has a flexible architecture which can integrate with many leading software systems and solutions, including but not limited to Google, Office 365, SSO (including Active Directory, Google, and SAML).

2.4.4   Provide a list of all email/calendar providers, facilities and maintenance systems, help desk and work order systems, website systems, digital signage systems, , video conferencing providers, financial systems/invoicing software, and payment processors/credit card payment processors that Vendor's proposed Solution is currently integrated with. For each, please provide a brief description of the level of integration and how frequently the system can pull/refresh data from these data sources. For systems that rely on data FROM the facilities and resource management Solution, specify any limitations on the number, frequency or scope of scheduled extracts that Participant agencies can create and use. **
Facilitron is built following RESTful/API concepts which allow it to be open to both external API calls and batch processing via web services. In regards to integrating with other
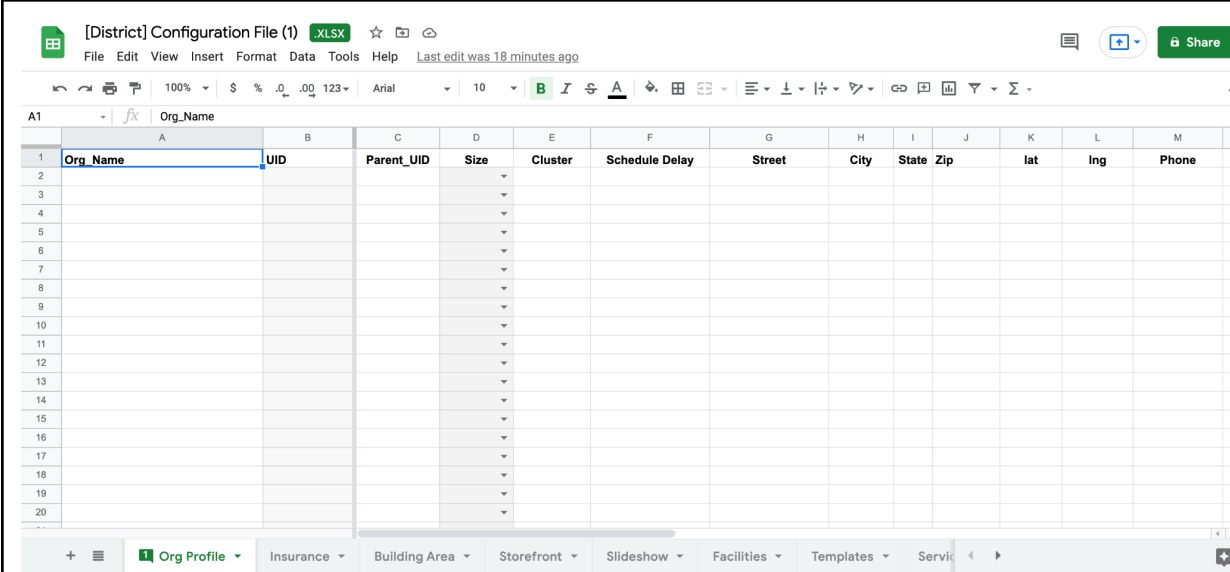
systems, we would first need to understand the nature and structure of the data that needs to be integrated as well as the abilities of these systems to ingest or expose the necessary data. Currently the Facilitron platform has integrated with external systems via multiple methods (e.g.: direct web services API calls between applications utilizing shared keys, shared cloud based repositories, etc.)

Systems	Describe Level of Integration/Partnership
Email/Calendar Providers:	Google, Outlook, iCal, Yahoo (open API structure)
Facilities and Maintenance Systems:	Facilitron is a Facilities and Maintenance system of record, option to integrate with others
Help Desk/Work Order systems:	FreshDesk and AWS
Website Systems (Online Calendars):	Google, Outlook, iCal, Yahoo
Digital Signage Systems:	Open API Structure
Video Conferencing Providers:	Zoom, Webex, Google Hangouts, Teams
Financial Systems/Invoicing Software:	Internal financial reporting and invoicing software, open API structure for others
Payment Processors/Credit Card Payment Processors:	Braintree
Other Integrated Systems:	Open API structure, see intro paragraph

2.4.5   Describe Vendor's data integration and loading process, including sample file layouts. **

Facilitron has an ETL program for all of its data conversation/extraction. There are multiple .csv files we use during implementation and ongoing maintenance that we process. Here is just one of the sample files:

2.4.6 Describe support for creating custom, scheduled imports and exports.

During the implementation process, scheduled imports of users, schedules, facilities, work orders, etc. will be batch uploaded into the system. After implementation, district staff can work with their dedicated Account Manager to schedule additional imports. Exports can be done at any point by staff with the appropriate role or the district Account Manager.

2.4.7 Describe the capabilities of the Solution to provide bulk imports and exports.

Facilitron fully supports bulk imports and exports. Bulk imports and exports can be coordinated with the district Account Manager and scheduled accordingly.

2.4.8 ** Describe the Solution's approach to interoperability with related student or other data systems.

Facilitron does not collect or store any sensitive student information within the platform. Any data imported into the Facilitron platform is protected by specific permissions set up during the implementation process. All roles are able to be customized by the district to ensure staff have access to only necessary information and confidential or private financial data are restricted to the necessary staff.

2.4.8.1 Explain the process and tools available (ex: API) for Participants to integrate the Solution with other data systems.
Facilitron is built following RESTful/API concepts which allow it to be open to both external API calls and batch processing via web services. In regards to integrating with other systems, we would first need to understand the nature and structure of the data that needs to be integrated as well as the abilities of these systems to ingest or expose the necessary data. Currently the Facilitron platform has integrated with external systems via multiple methods (e.g.: direct web services API calls between applications utilizing shared keys, shared cloud based repositories, etc.)

2.4.8.2 Describe whether the Solution adheres to common standards (ex: Ed-Fi, One-Roster) and /or leverages third-party integration options (ex: Clever, Classlink) to improve interoperability.
Facilitron adheres to PMI, LEAN and Agile methodologies for project and development management. The platform is an open API architecture, so most third party integration is available. While our platform does not contain sensitive student data, so Ed-Fi is not applicable, we are structuring our security and data models with this alliance in mind.

2.4.8.3 If the Solution does not utilize or conform to any common standards, describe how Vendor guarantees data interoperability between Solution and various Participant existing systems.
See above.

2.5 Security

	Yes	No	P	C	Comments
2.5.1 Confirm that the Vendor's information security policies are documented and available to clients upon request.**	X				
2.5.2 Confirm that Ed Tech JPA and Associate Members may review Vendor internal and/or 3rd party security audits.	X				
2.5.3 Warrant that Vendor provides background checks on all employees, and/or that only employees who have undergone said background checks will have access to Participants'/Districts' data.	X				

2.5.4 Confirm that Vendor requires all employees to sign data handling agreements at hire.	X				
2.5.5 Certify that Vendor employs and will continue to employ a dedicated CISSP certified security manager, or the equivalent, to test the Solution and run ongoing checks/improvements.	X				
2.5.6 Confirm that Vendor is capable of providing access limitations based upon Participant roles, and give the site system administrator a tool to modify access rights at the individual level. Vendor's Solution must be configurable to provide specific user rights and roles and to restrict data access and administrative oversight to the appropriate personnel. **	X				
2.5.7 Vendor agrees that, even if the proposed Solution is hosted by Vendor, data housed in the Solution remains the sole property of Participant and cannot be used in any way not explicitly approved by Participant.**	X				
2.5.8 Confirm that no third-party shall be given access to Participant data for any reason without explicit, written authorization from the Participant. Any third party used to support the Solution must be identified as a designated subcontractor in the RFP response. **	X				

2.5.9   Provide a description of Vendor policy regarding storage, retention, and distribution of data. State Vendor data non-release policy.
Any transactional data is stored in the platform's secure database and is retained for at least seven years. Facilitron does not release any data without the explicit consent of the client.

2.5.10 Explain internal Vendor company protocols regarding the handling of client data.
Facilitron follows encryption security policies in accordance to SPI data. All data is accessible via a role based security methodology.

2.5.11 Confirm the Solution shall effectively secure and protect Participant information. Please describe the security measures (physical and technological) taken to protect data.
Security Plan Application data access: Facilitron is able to be configured to fit any necessary permissions and workflows of the district. Roles can have differing levels of access from view only to full access to make any adjustments or edit any aspect of a reservation request. These levels of access can also extend to the type of reservation. For example a site admin may be able to input any internal event and have it automatically added to the calendar; yet for external requests submitted by community users, the same admin may be limited to a role in the approval process known as a "pre-approver." Infrastructure Information: The database server is hosted at MongoDB Atlas, a third party hosting provider. The MongoDB Atlas environment supports user, role, and team based access control. Access to this environment is provided to Facilitron employees based on job description and role and cleared by a C-Level executive. MongoDB provides industry standard infrastructure/document structure for data operation transaction control/integrity/atomicity as well as multi-document transaction control. The Facilitron platform utilizes the integration between Heroku and GitHub for the deployment / storage of the platform source code, and utilizes the backup structure of MongoDB Atlas for daily database backups. Facilitron is built following RESTful/API concepts which allow it to be open to both external API calls and batch processing via web services. In regards to integrating with other systems, we would first need to understand the nature and structure of the data that needs to be integrated as well as the abilities of these systems to ingest or expose the necessary data. Currently the Facilitron platform has integrated with external systems via multiple methods (e.g.: direct web services API calls between applications utilizing shared keys, shared cloud based repositories, etc.)

2.6 Mobile Functionality

	Yes	No	P	C	Comments
2.6.1 Confirm that the Solution provides a mobile application and/or incorporates responsive design that provides access with smartphone or a web browser on a smart phone.	X				
2.6.2 Confirm that, when accessed on a mobile device, the Solution is not limited and	X				

has all of the features a user would access on a standard desktop or laptop.					
2.6.3 Confirm that the mobile-accessible Solution allows all features to be fully functional on all browsers	X				

2.6.4 Describe any differences in functionality between the mobile application and the web interface. Be specific about any missing or deprecated features for both requestors and administrative users.

Facilitron is a cloud-based platform and allows districts to access the platform from any device. Built in responsive design, Facilitron's platform can allow district staff to pull up any necessary documentation from a mobile device, tablet, or computer with the same user experience and functionality.

2.6.5 List all mobile operating systems that the mobile application is available in.

Facilitron is available for iOS and Android.

2.6.6 Describe any additional features of the Mobile App not already listed.

None, Facilitron has full functionality on any device.

2.6.7 Provide a screenshot of the Solution as accessible by mobile browser.
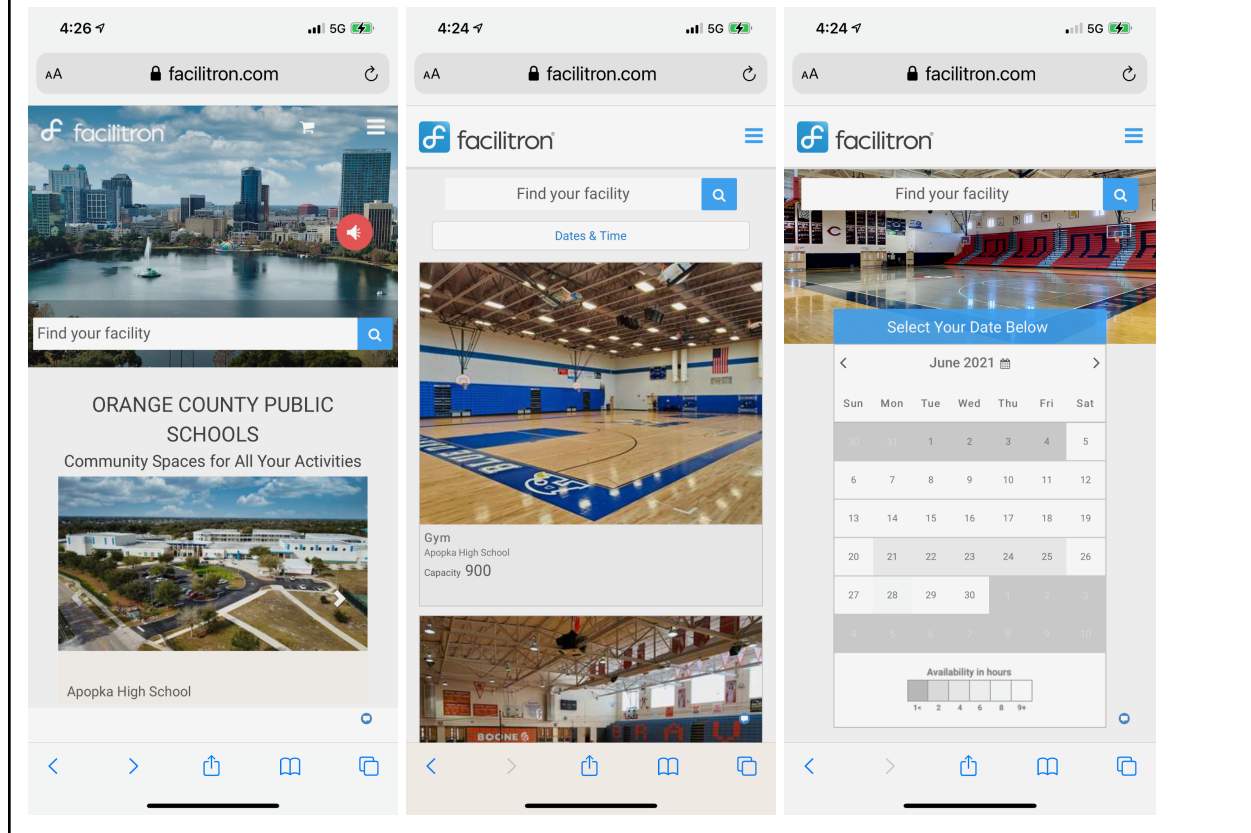
2.6.8 Provide a screenshot of the available mobile application.
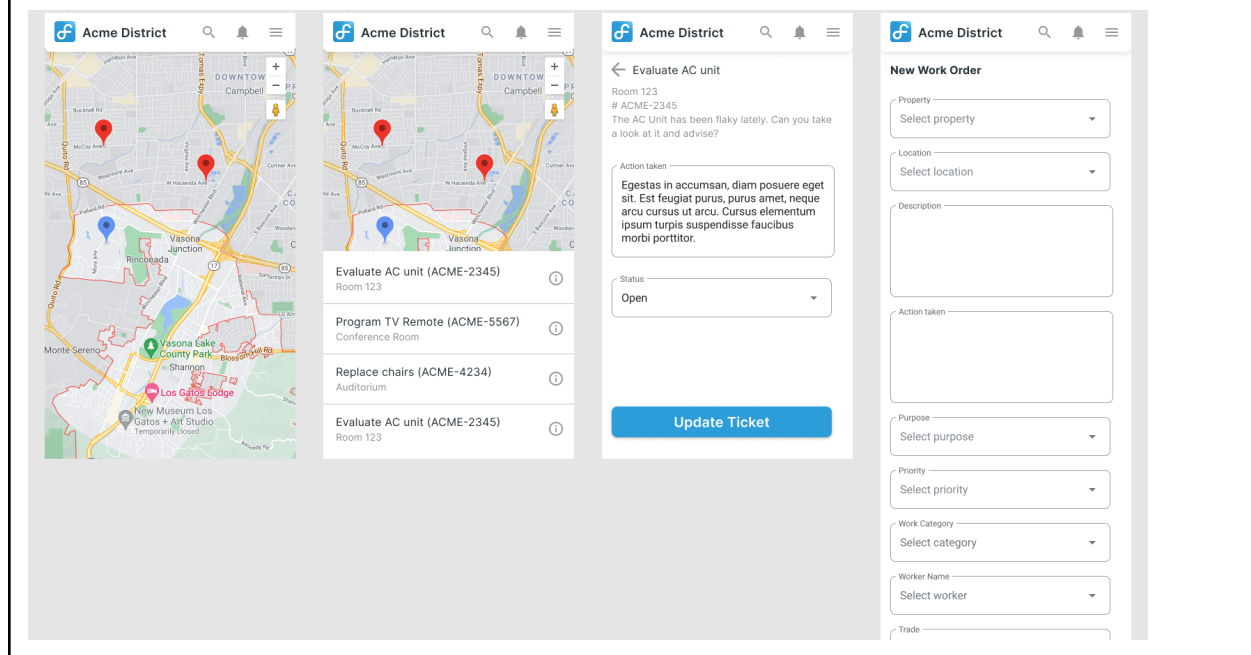
2.6.9 Describe the ability within the Solution to send push notifications (ie: Are push notifications sent automatically when a status is updated? Can administrative staff send a push notification?).
Facilitron allows district and school staff to communicate directly through the platform, log a history of changes made, and can automatically send push notifications. Push notifications can be sent to all parties or to select recipients depending upon who needs to be notified.

2.6.10 Describe the ability within the mobile application for administrative staff to upload photos (Ex: take a photo of playground equipment and upload it to the app).
Facilitron allows users to upload photos directly within the platform using their phone or uploading a jpeg or pdf file from their computer. Using the mobile application, a user has the option to have the application access their camera to take a photo or can upload a photo from their library.

Part 3 Functionality and Usability

Module	Included in Proposal (Y/N)	Individually Licensed (Y/N)	Package Only (Y/N)	Comments (Please list applications that must be bundled with purchase if applicable)
3.1 General *Required criteria must be met for award in sections 3.2 and/or 3.3.*	Y			
3.2 Internal User Resource Reservation	Y			
3.3 External User Resource Reservation	Y			
3.4 Facility Resource Management	Y			
3.5 Work Orders	Y			
3.6 Integrated Resource Management	Y			

3.1 General

*All vendors must meet all **required** criteria in the General section for award for sections 3.2 and/or 3.3.

	Yes	No	Plann ed (P)	Custom izable (C)	Comments
3.1.1 Confirm that the Solution offers intuitive navigation with minimal training needed. **	X				
3.1.2 Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **	X				
3.1.3 Confirm that the Solution is designed with simple self-service functionalities for requestors to schedule a resource.	X				
3.1.4 Confirm that the Solution includes the capability to set up for multiple types of resources (ie: conference rooms, fields, pools, gyms, pools, theaters, multi-purpose rooms, classrooms, etc.).	X				
3.1.5 Confirm that the Solution includes the capability to set up for additional types of non-location resources such as audio visual equipment and technology (ie: ability to request laptops, microphones, user devices, additional custodial/IT assistance, after-hours air conditioning, etc.).	X				
3.1.6 Confirm that each room/resource in the Solution can include detailed resource attributes (ie: available times, room capacity, seating layout options, room photos, location of room/resource on a map, etc.).	X				
**3.1.7 Confirm that requestors can see availability of resources at the beginning of the reservation process. **	X				
3.1.8 Confirm that resources with pending and approved requests for the reservation time requested can be shown as unavailable.	X				
3.1.9 Confirm that administrative staff can view	X				

pending requests as well as confirmed reservations.					
3.1.10 Confirm that administrative staff and internal requestors can view whether a request is pending or approved.	X				
3.1.11 Confirm that the Solution can provide a post-occupancy survey to requestors.		X			In discussion but no planned production as of yet

3.1.12 Describe the user experience when searching for and booking a resource. Include screenshots of the process.
Facilitron has an online community request portal that allows community renters to search and reserve district facilities through a streamlined process. Renters can search for a facility type (i.e. gym), filter for date, time and capacity, and pull up all available gyms across the district. Each site has a dedicated facility details page that provides photos and lists a description of the space, available amenities, rates, and a real-time availability calendar.

During the checkout process, the renter is asked to provide the details of their event, select any optional equipment or services they may need, purchase event insurance and pay for their reservation by PayPal, credit card, eCheck or mail in check. The district will have the option to configure rates and required services/fees based on group and event type. Once the request has been submitted, it will be routed through a custom approval process based on district requirements.

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Event at Osceola County School For The Arts

Person or Organization Booking Event:

Poway Unified School District   ▾

Event Name
Theater Performance

Event Type   Number of Attendees
Performance   ▾   200

Are you charging a fee for the event?   ☑ Yes ☐ No

Do you require parking for this event?   ☑ Yes ☐ No

Please provide specific details about your Event in the box below, including any set up instructions,
equipment needs, or staffing needs that are required

Enter Your Answer
Doors open at 6pm, Performance begins at 7pm

I acknowledge that I have read the COVID-19 requirements for facility   ☑ Yes ☐ No
usage at The School District of Osceola County, Florida terms and
conditions carefully, in its entirety and fully understand its terms. I
acknowledge I agree freely and voluntarily, intending to be legally
bound.

Do you have a technical rider? If yes, please upload to the   ☐ Yes ☑ No
"Documents" section of the Request Management Page (after your
request has been submitted).

The deposit paid upon signing of the Facilities Use Agreement is non-   ☑ Yes ☐ No
refundable, and non-transferable to another date, event, or Lessee.
Events cancelled by the Lessee less than 72 hours prior to the
Lessee's contracted arrival time will forfeit all advance payments
made to The Center for rental fees and may also forfeit a minimum
four-hour call, at the prevailing rates, for each member of event
personnel listed on the Detailed Invoice, as well as other expenses
incurred by the Center associated with late cancellation of the Event.
The Lessee will also be liable for other expenses incurred, including
attorney's fees. I have read and agree to these terms:

I acknowledge that I have read and agree to the usage requirements   ☑ Yes ☐ No
for the OPAC Theatre and the OPAC Expo at Osceola County School
for the Arts and fully understand its terms

Please list your schedule, including load in time, performance time, sound check time, etc.

Enter Your Answer

Reservation Details

OPAC Theatre/Auditorium (Capacity: 1977)
07/30/2021 - 08/20/2021 6:00 PM - 9:00 PM
Selected Dates: 07/30/2021 08/06/2021
08/13/2021 08/20/2021 (4 days)

Parking Lot
07/30/2021 - 08/20/2021 6:00 PM - 9:00 PM
Selected Dates: 07/30/2021 08/06/2021
08/13/2021 08/20/2021 (4 days)

☐ My dates and times are flexible ❓

Continue

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Theater Performance

Performing Arts Center   08/05/2021 - 08/27/2021 6:00PM - 9:00PM (5)
Parking Lot   08/05/2021 - 08/27/2021 6:00PM - 9:00PM (5)

Event Insurance

This facility requires event liability insurance. (view insurance requirements)

Would you like to purchase event liability   Event Insurance Protection
insurance?
                                                  Event liability insurance is presented by Southwest
$200.00   [YES] [NO]   Insurance Brokers, LLC for the needs of facility
                                                  renters. Southwest Insurance Brokers, LLC
By declining I acknowledge that I will provide proof   designed this program to maximize ease of
of my own insurance and I agree to Facilitron   purchase and offer competitive pricing.
Terms and services
                                                  Facilitron, Inc. is not in the business of explaining
                                                  coverages or actively promoting the services of
                                                  Southwest Insurance Brokers, requiring purchasers
                                                  to use Southwest Insurance Brokers, nor otherwise
                                                  engaging in the transaction or solicitation of
                                                  insurance products. Learn More

Optional Services & Equipment

Options selected below apply to all days in the reservation. Prices shown are the totals (per unit) for all uses.

☐ Restroom Use $0.00
☐ Wireless Use $0.00

Performing Arts Center
☐ HVAC $0.00

Order Summary

Custodial Staff: $0.00
Performing Arts Center $900.00
Parking Lot $225.00
Liability Insurance $200.00
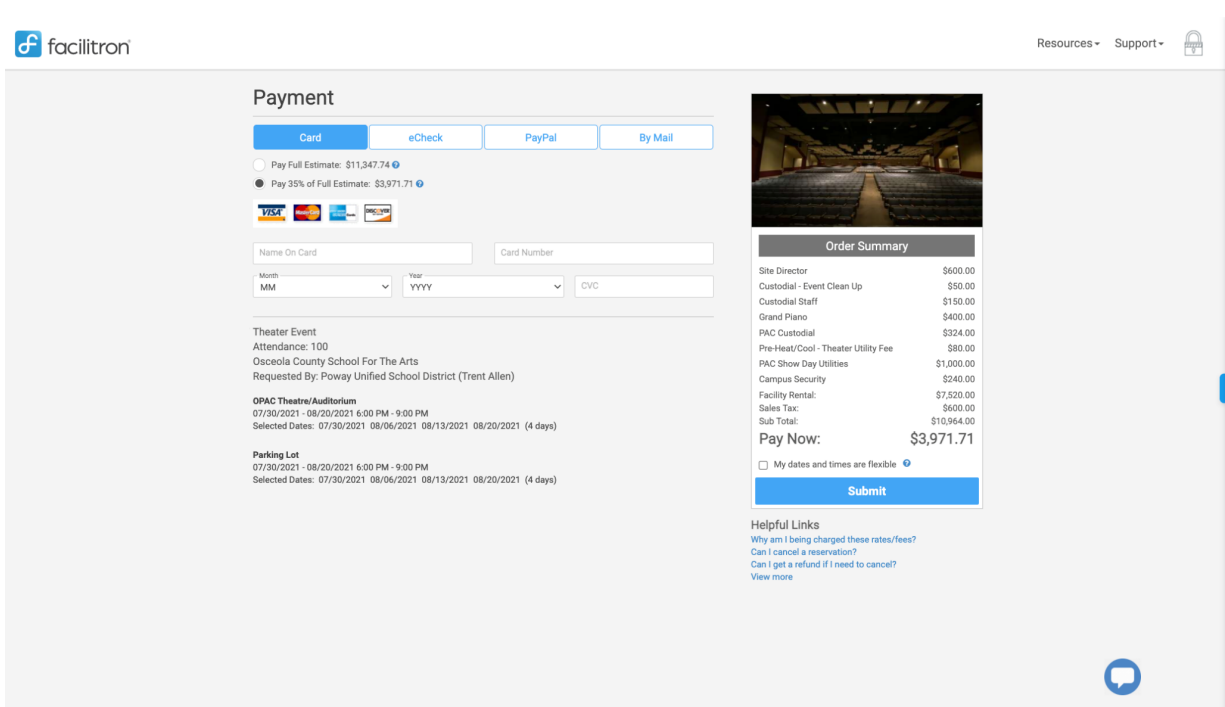
☐ My dates and times are flexible ❓

Continue

This is the best estimate based on the provided
information.

IMPORTANT: All requests must be approved by Del Norte
High School and all payment and insurance requirements
(if any) must be satisfied before the user is granted
authorization to use facilities. It is recommended that
users review the terms and conditions for facility use and
be able to provide the use permit (available from your
reservation) at the time of your event.

For internal staff to request a facility, requestors can simply log into the administrative portal and click the "+ Events" button on the calendar and fill out the information for their event. Depending on their role/privilege, requests can be automatically added to the calendar or can go through a custom approval process.

3.1.13 Describe how the Solution prevents double-booking.

Facilitron's request portal for community renters has a real-time availability calendar that only allows renters to request dates and times that are actually available, preventing double booking from the start. Internal requestors can use the district/school site calendars to see

facility availability in real-time and submit their schedule accordingly. Any request that is submitted by either internal or external requestors is automatically verified to confirm there are no scheduling conflicts and will produce an alert notifying the requestor that there is already an event taking place and ask them to revise their reservation.

3.1.14 List what types of location/facility resources the Solution can manage (ie: conference rooms, fields, pools, gyms, theaters, multi-purpose rooms, and classrooms).

Facilitron can manage any type of location/facility resources, including: conference rooms, fields, pools, gyms, theaters, MPRs, classrooms, and libraries.

3.1.15 List what non-location resources the Solution can manage, such as audio visual equipment and technology (ie: laptops, microphones, user devices).

Facilitron can manage any number of non-location resources, including audio visual equipment, technology equipment (i.e. laptops, microphones, etc.), sporting equipment (i.e. volleyball nets, bleachers, etc.), and meeting equipment (i.e. tables, chairs, podiums, etc.).

3.1.16 Describe how the Solution differentiates location resources (such as a room) from non-location resources (such as requesting audio visual equipment).

Facilitron's database categorizes location resources by facility type and geo-location, whereas non-location resources are listed as a piece of equipment that can or cannot be tied to an individual location.

3.1.17 Describe the functionalities within the Solution to customize each resource with specific room attributes (ie: window of time available for reservation, seating layout options, room photos, location of room on a map, furniture, available audio-visual equipment, room capacity, if food or drink is allowed, etc.).

During the implementation process, Facilitron will create a digital catalog of all district facilities and include details about specific room attributes. When community renters are requesting space, they will be able to review photos, amenities, room capacity, setup/layout options, geolocation information, and equipment and services available for that space.

3.1.18 Describe how the Solution can differentiate the attributes stored by resource (e.g., collect capacity and configuration for a meeting space, and operating system for presenter laptops).

Facilitron creates a resource database that catalogs specific details about each individual facility. All information will be displayed on the facility details page for requestors to review when making their request.

3.1.19 For meeting rooms and other facilities resources, indicate which of the following attributes can be stored within the Solution and used by requestors to search for available resources with specific attributes.

Column 1:   Indicate "Yes" if the resource attribute can be stored in the system. Indicate "No" if the system does not have a designated field or fields available to store the requested information.

Column 2. Indicate "Yes" if requestors can search for resources using the attribute (e.g., limiting a search to meeting rooms available at 1pm with a minimum capacity of 20 and adjacent restrooms). Indicate "No" if the attribute cannot be used as criteria in searching available resources (i.e. is not stored in the system or is not a searchable attribute during the reservation process).
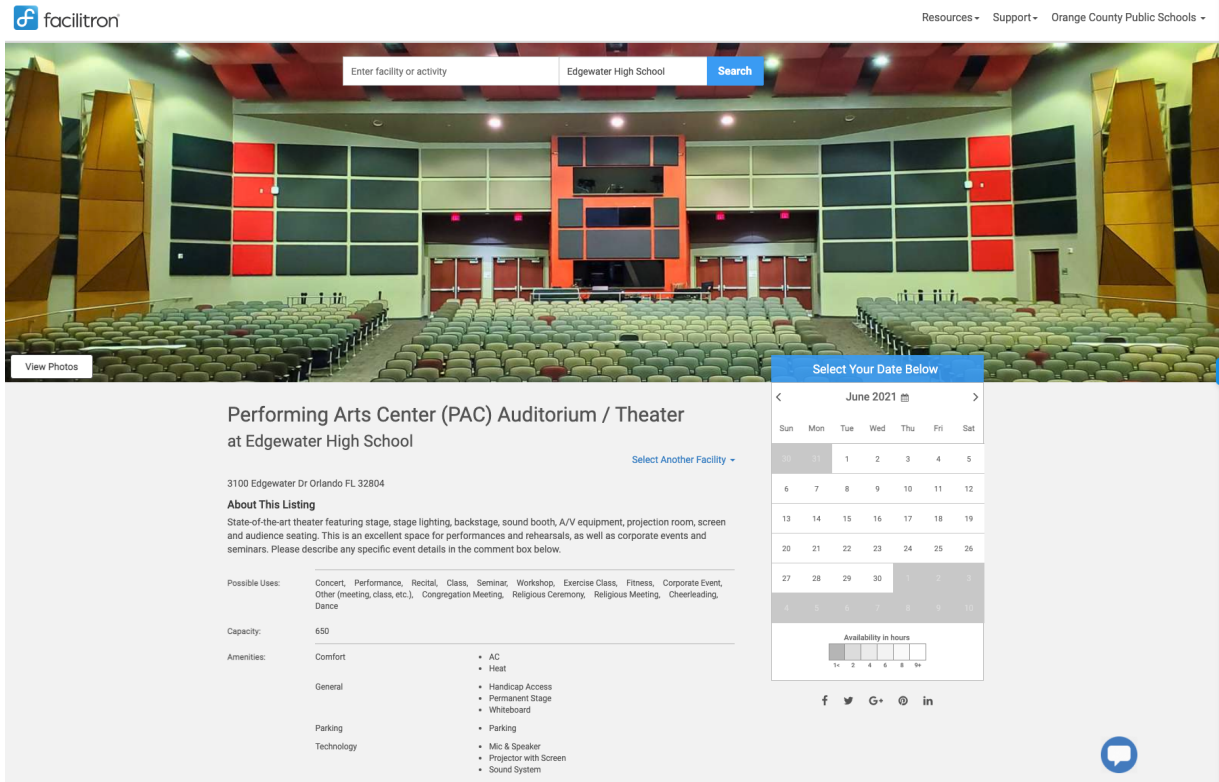
1	2	Attribute
Yes	Yes	Resource type (conference rooms, fields, pools, gyms, theaters, multi purpose rooms, classrooms, etc.)
Yes	No	Audio visual equipment available (microphones available, whiteboard, projector, pull-down screen)
Yes	No	IT equipment available (laptops, other user devices)
Yes	No	Wireless internet or guest internet access available.
Yes	Yes	Times available for use
Yes	Yes	Availability of custodial staff support for room set up/take down
Yes	No	Possible seating configurations
Yes	No	Different capacity based on seating configuration (e.g., 50 attendee capacity with theater seating/chairs only, 20 with tables and chairs)
Yes	No	Photos of the room
Yes	No	Location of the resource on a map
Yes	No	Available furniture
Yes	Yes	Room capacity
Yes	No	Possible Room configurations
Yes	No	Type of furniture used for each seating configuration (ie: tables and chairs,

		chairs only, etc.)
Yes	No	If food or drink is allowed in resource
Yes	No	Access to available (unlocked) restrooms
Yes	Yes	Ability to request access to restrooms if resource does not have adjacent unlocked restrooms
Yes	Yes	Ability to request additional custodial or IT support
Yes	No	Air conditioning availability/hours
Yes	No	Ability to request air conditioning if after hours
Yes	No	Accessibility accommodations (listening devices)
Yes	No	Ability to request accessibility accommodations (listening devices)
Yes	Yes	Parking capacity
No	No	Ability to provide customized parking capacity dependent on time of day and other scheduled events.

3.1.20 Describe any limitation within the Solution to customize each resource with specific room attributes (ie: limited number of attributes, limited customization).
None. Facilitron is able to customize each resource with specific room attributes.

3.1.21 Provide screenshots of a sample resource in the Solution including possible room attributes.

3.1.22 Describe the ability within the Solution to create custom resource attributes.

During the implementation process, Facilitron will create a digital catalog of all district facilities and include details about specific room attributes. When community renters are requesting space, they will be able to review photos, amenities, room capacity, setup/layout options, geolocation information, and equipment and services available for that space.

3.1.23 Describe the ability within the Solution to upload attachments (such as maps and possible room set-ups) and include them in resource attribute lists (process to upload, file size limitations, etc.).

During the implementation process, Facilitron will create a digital catalog of all district facilities including uploading photos, 360° and drone images, possible room set-ups, and link to the geolocation to show where the facility is located on the campus.

**3.1.24 Describe the ability within the Solution to customize visibility permissions for certain resources and resource attributes based on user type/roles (such as system administrator,

facility manager, approver, internal requestor, external requestor, etc.)(Ex: varsity fields are available for internal requestors only and external requestors do not see them as available resources. Ex 2: external requestors cannot view resource photos and maps and do not view resources unavailable to external requestors).**

Facilitron is a role based system with dedicated portals for internal and external requestors. External community renters are required to create an account that is then assigned a rate category based on district board policy. External groups will see limited availability and facility space/resources that are open to the public to request.

Internal school and district staff will have access to see and reserve all facilities depending upon their role. The district can have any number of custom roles for internal users, including: view only, internal requestor, pre-approver, final approver, system administrator, etc. These roles can even have different privileges based on facility type or internal vs. external requests. For example a high school athletic director may be able to input any internal event in the gym and have it automatically added to the calendar; yet for external requests submitted by community users, this same AD may be limited to a role in the approval process known as a "pre-approver."

Custom approval paths can be set up for incoming requests based on group type, facility, role, and internal/external request.

3.1.25 Describe the extent to which reservations and reservation attributes can be designated as public or private. Private meeting subject and requestor details would only be visible to the requestor and users with elevated permissions (e.g., systems administrators). Limited details of public meetings (requestor, subject) should be visible to system users and available for integration to digital signage and other calendar tools. Please include any role restrictions in making a reservation private (ie: administrative staff should be able to view all reservations).

Much like any facility, amenity or service can be designated as public or private in Facilitron, so can reservation details and who has access to view them. For the community, a requestor can usually only see that the space is unavailable for request and is unable to view who has booked the space or any information regarding the event. If the district so chooses, they are able to create a public facing calendar or events and select what information to make visible (i.e. only external, after-school events showing just the reservation name).

For internal activities, information can be restricted by specific roles. For example, there may be a conference room at the district office that is only used by the superintendent; that room could be hidden to everyone except for the superintendent and their admin to reserve.

3.1.26 Describe how resources can be grouped (ie: by location/school site, resource type, etc.).

Resources can be grouped by location/school site, facility (resource) type, and activity type.

3.1.27 Describe how permissions can be applied per group (e.g., limiting visibility to resources by a location group, requiring approval for resources in one group while another group allows direct booking.

Facilitron is a role-based system that allows specific privilege and permissions based on district policy and approval process. The district has the option to create as many different rate categories for external users and roles for internal users as they see necessary. These different permissions can restrict access by facility, time of day, locations, and/or require additional approval or permit direct booking.

3.1.28 Describe the capability within the Solution for requestors to edit pending and/or approved requests they have made and how administrative staff is notified of requested edits.

Editing capabilities differ depending on if the user has an external or internal role. External requestors will be required to make a comment in the reservation details page notifying the district/school site of changes that need to be made and may require additional approval. Internal users can have varying levels of access to edit reservations, including: view only (no edit capabilities), ability to edit their individual requests, ability to edit internal requests, and full access to edit internal and external requests.

All edits or requests to edit are logged in the Comments and History section of the reservation details page with a date and timestamp for when the change was made and by whom. This log ensures a digital audit of all changes in the event that there is any confusion or questions regarding a reservation request. Custom notifications can be set up depending on a user's role to ensure all relevant staff is kept up to date.

**3.1.29 Describe the workflow within the system when an edit is requested for a reservation that has already been approved. Include information on how the request to change affects the status of the existing reservation and how the new pending request displays in the system to prevent double booking. Provide details on how changes are routed and approved. **

When a reservation is already approved, edits are still able to be made but may require additional approval from staff. For external requests, the community user would need to log into Facilitron and find the reservation that needs to be edited. They would then click the "Request Change" button and make a comment for whatever needs to be changed in their reservation. The change request will then be submitted to district/site administrators for review and approval.

Internal requestors may use the same request change feature as external users or they may have the permission to update their own reservation. If they are able to update their own request, they can simply select a new time, date, facility or service and apply the change to the reservation. Any scheduling conflict will appear in red at the top of the reservation and will

require review prior to final approval.

All changes will automatically generate a notification within the system that will alert all relevant parties via email of the updates made. If pre-approval needs to be verified by a specific party (i.e. a custodial manager), a specific comment can be sent to that individual asking for verification of staffing availability prior to making the change. All communication and changes will be logged within the reservation.

3.1.30 Describe if anyone else can edit pending and/or approved requests (ie: can administrative staff change a requestors' criteria?).

The ability to make changes within the system and when changes are able to be made is dependent upon the user's role. A user with view only access will not be able to make any changes to a reservation, whereas a system administrator may be able to make changes to any reservation regardless of status.

3.1.31 Describe available role-based permissions within the Solution.

There are 5 main role-types within the system that are able to be configured and customized as needed by the district.
1. **External Requester**: This is an external, community user that can only request resources available to the public outside of school hours
2. **View Only**: An internal district/school site role that allows a user to view reservations and make comments.
3. **Pre-Approver (PA)**: An internal district/school site role where users can modify and pre-approve any reservation.
4. **Enhanced Access (EA)**: An internal district/school site role that can modify and pre-approve external reservations (placed by someone outside of this organization), can modify and approve/decline internal reservations. Internal reservations placed by this role are automatically approved and added to the schedule.
5. **Full Access (FA)**: An internal district/school site role that can modify and approve/decline any reservation. Any internal reservations placed by this role are automatically approved.

3.1.32 Describe the ability within the Solution to prioritize various users' requests (ie: the Superintendent's staff may have ability to override other requests; a user at a school site may have higher priority for resources at their site than a user from a different site; internal requestors may have higher priority than external requestors, etc.), including notifications to all requestors and administrative staff.

Prioritization and reservation override is also controlled by Facilitron's roles. The district is able to customize any roles and privileges needed for internal and external users.

**3.1.33 Describe how resource unavailability appears to requestors, including unavailability due to maintenance and site modifications. **

External users will see availability on the facility details page using the real-time availability calendar. This calendar has a sliding gray-scale to show available time slots throughout the day. Any times that have already been reserved or blocked off for maintenance will be grayed out and unable to be selected for request.

Internal users will be able to see availability by logging into Facilitron and going to the district/school calendar. Depending on their role, internal users may have more viewing capabilities than external users, such as the ability to see what events are taking place across the campus and where maintenance blocks have been placed to indicate facility closure.

3.1.34 Describe how the system supports relocating or rebooking reservations if a facility or resource becomes unavailable (e.g., a maintenance issue in a conference room requires the cancellation of all events over the next week in that space).

District/site administrators can quickly and easily relocate or rebook a reservation if the resource becomes unavailable. The admin can simply select the reservation that needs to be changed, click on the date that needs to be updated and select a new time or facility. Once the change is saved, all relevant parties will be notified, but we do recommend making a comment directly to the host of the event to ensure that they are aware of the change.

External community requests can go through the same relocation or rebooking process, but Facilitron also offers a unique service to our district partners. We understand that last minute changes or maintenance can come up and disrupt previously scheduled events. If changes need to be made to rebook or relocate a single event, or even a large number of events, simply contact the district Account Manager and our Customer Support team will jump into action to secure new times, dates or locations for any event. This service has been utilized often for districts facing emergencies such as inclement weather, fires, natural disasters, etc. There is no additional charge for this service, our goal is to help districts easily adjust to last minute changes and preserve the relationships with their external community renters.

**3.1.35 Confirm that requestors can choose to limit their search to available resources or choose to include all resources (including unavailable). **

When a requestor is searching for a facility, they are able to choose to search all facilities or limit their search based on dates and times that are available.

3.1.36 Describe how the system can support a priority user who needs to book a resource that is already scheduled for their desired time (i.e., are any workflows available for a priority requestor to displace another meeting or communicate with a meeting owner about the need to displace them.)

Internal priority users can place a request by going to the Facilitron calendar, clicking "Add Event" and inputting all the details of their request. When they click add to schedule, they will receive a notification that there is a scheduling conflict with an existing reservation and be asked if they would like to proceed. When they select "Keep and Proceed" their reservation will be automatically added to the calendar and override the existing event. The user can then go into the affected reservation and resolve the time conflict (select another date, time or facility) and notify the relevant part of the change.

**3.1.37 Describe communication from the Solution to the requestor. Please be sure to describe how the status for requests are clear to requestors (ie: email confirming that request has been received, status emails, reminder emails about pending documents/information, confirmation of reservation changes, email confirming that reservation has been approved, etc.). **

Facilitron has automatic email notifications to both renters and district staff. Renters receive an email confirming the submission of their request and will receive updates when the status changes (Approved/Declined) or a change is made to the reservation. Notifications for district staff can include a new submitted request that's pending approval, pre-approval response, cancellation, and notification on any comment added to the reservation. Notifications can be tailored by role, as well as workflow. When a new reservation is approved, Facilitron can automatically generate a work order and notify specific teams, such as custodial or security.

3.1.38 Clarify if multiple users can be listed as requestors and if all requestors receive the same communications from the Solution (ie: an administrative assistant can create a request for an administrator and both are listed as requestors and receive the same status updates/confirmation emails).

Facilitron allows any number of users to be attached to an external community organization and receive the same communication regarding updates/changes to their reservation. For internal requests, there is only a single requestor and pre-configured pre-approvers within the approval workflow that will all be notified of new submission or changes made to a reservation.

3.1.39 Describe how requestors can check on the status of requests (ie: log onto a website, etc.).

Requestors can log into their Facilitron account and pull up a full list of their submitted reservations. They will be able to see the status of each request in the Reservations tab under Active, from there they will be able to find and filter for any reservation they're looking for and can click directly into the reservation to make a comment regarding the current status.

3.1.40 Describe what information is available to requestors related to their past, pending, and approved requests (ie: a list of past, pending, and approved requests they have requested).

All past, pending and active reservations requests are logged in the system and can be pulled up in the Reservation tab. Any reservation details can be viewed in the system by going to the reservation details page to view payment history, past COIs, schedules, documentation, etc.

3.1.41 Describe the ability to differentiate approval workflows for requestors based on requestor permission or resource group (location, type of resource). For example, administrative office staff can directly book resources at the district office, but require approval for facilities at a high school. External users require approval for all requests.

Facilitron is a role-based platform that allows the district to customize each role's access and privileges as needed. Each role is defined during the implementation phase and users will be assigned to a specific role based on what they will need to access. Roles can limit access to place and approve reservations for either internal or external requests. Facilitron's customizable roles would be able to easily accommodate the example of the administrative office staff being able to reserve space at the district office, but requires approval at the high school.

3.1.42 Describe notifications from the Solution to administrative staff authorizing requests for all resources that require approval (ie: notify site staff re: requests, notify custodial staff re: set up and take down, notify IT staff re: requested equipment, notify theater staff re: theater use, notify staff re: air conditioning).

Facilitron has automatic email notifications to both renters and district staff. Notifications for district staff can include a new submitted request that's pending approval, pre-approval response, cancellation, and notification on any comment added to the reservation. Notifications can be tailored by role, as well as workflow. When a new reservation is approved, Facilitron can automatically notify staffing for services such as custodial, IT, theater, or HVAC.

3.1.43 Describe how the system supports resource administrators in reviewing and approving or declining pending reservations. Include screenshots that demonstrate the approval workflow.

When a reservation request is submitted, Facilitron will automatically notify individuals within the approval workflow based on the type of request. Facilitron keeps a full list of individuals in the approval workflow stored in the Reservation Details Page so that the final approver can see who has responded to the request (see screenshot below). When a pre-approver receives a new request, they can either accept or decline the request, which is logged as a green thumbs up or a red thumbs down next to their name in the pre-approval list. Pre-approvers are asked to provide additional context for declining requests that can be evaluated by the final approver.

Facilitron's platform supports a "round-table" approach to approval to streamline workflow and reduce bottlenecks within the approval process. Facilitron's suggestion for best practice is to allow a set amount of time for pre-approvers to weigh in on a pending request before a final approval or decline is made, but this is ultimately up to the district to decide. Several districts do still wait for input from each pre-approver prior to making the final decision.

3.1.44 Describe how the Solution supports requesting onsite services to support meetings and events (i.e., custodial or information technology support for before, after or during the event).

During the reservation request process, external community users will be able to select onsite services and equipment available for their reservation. These service and equipment requests will be considered when the district is making their final approval and assigning staffing and resources for events.

Internal requestors can simply click the "+ Events" button on the Facilitron calendar, input their

reservation details, setup instructions and select the facility that they will need. And specific services or equipment can be added through the reservation details page.

3.1.45 Describe how the Solution automates routing to requested support staff in various departments regarding reservations and customized requests (how does the Solution designate which alerts should go to which staff members, depending on resource type, location and requested support?).

Every user in Facilitron can have a dedicated role that will alert them of incoming requests that need their attention or approval. Reservation requests are routed based on location/school site, facility type, internal vs. external request, and services/equipment requested.

3.1.46 Describe how event/meeting support providers (e.g., custodial, technology staff) can confirm availability and approve a request for support for an event. Share how their acceptance/approval of the support request interacts with the approval of the reservation (i.e., if the reservation of the location was approved, but requested IT support is not available, what is the requestor's experience)?

Every user in Facilitron can have a dedicated role that will alert them of incoming requests that need their attention or approval. Any support providers can be included in the approval process based on district need.

3.1.47 Describe the ability within the Solution for administrative staff to customize workflows and messaging for requestors, including clear messaging when a request is submitted regarding the approval process.

All workflows within Facilitron are customizable and set up during the implementation process. The district can always make additional adjustments to workflows by simply contacting their Account Manager.

Facilitron allows district and school staff to communicate directly through the platform. The comments sections in the reservation details page allows district and school staff to communicate any additional messaging regarding approval either between internal staff or notifying external requestors. Comments will automatically generate email notifications to all relevant parties.

3.1.48 Describe the ability within the Solution for administrative staff to customize workflows and messaging for staff approving requests.

All workflows within Facilitron are customizable and set up during the implementation process. The district can always make additional adjustments to workflows by simply contacting their Account Manager.

Facilitron allows district and school staff to communicate internally directly through the platform. Internal comments in the reservation details page allow district and school staff to communicate any additional messaging regarding approval. Comments will automatically generate email notifications to all relevant parties.

3.1.49 Describe the workflow capacity within the Solution to get multiple approvals prior to confirming a request (ie: approval from facilities department, followed by approval from site where requested resource is located, etc.).

Facilitron's platform supports a "round-table" approach to approval to streamline workflow and reduce bottlenecks within the approval process. Facilitron's suggestion for best practice is to allow a set amount of time for pre-approvers to weigh in on a pending request before a final approval or decline is made, but this is ultimately up to the district to decide. Several districts do still wait for input from each pre-approver prior to making the final decision.

3.1.50 Describe different criteria that can be used to customize workflows for each resource, such as: location, type of resource, resource attributes, etc. (example: a request is placed for the theater of School A; the facilities staff, School A theater staff, School A custodial staff, IT staff, School A theater staff are notified and approve the request).

Facilitron allows districts to customize their approval workflows based on location, facility type, services and equipment requested, request type, and capacity.

3.1.51 Describe the Solution's ability to include required custodial set-up and take-down when requestors place a request. (Is custodial time automatically included when showing available resources? How does this appear to requestors?)(Ex: a requestor places a 5 hour reservation and the Solution automatically includes and extra half hour for custodial set-up and an extra half hour for custodial take-down resulting in a 6 hour reservation).

Facilitron requires renters to account for set-up and tear-down times when placing their reservation request. District or site staff can always make adjustments to the time allotted depending on the complexity of set-up required or if the requester left the space a mess that required additional staff/hours to clean up.

3.1.52 Describe the Solution's ability to calculate available parking for a resource depending on the time of day and other scheduled events at the location (Ex: if swim and track meets are scheduled during a busy time of day vs. if no events are scheduled at the location).

Facilitron manages parking lots on the platform as an additional resource to request. Facilitron can add custom application questions to the rental application asking if parking is required and the capacity for the event. Based on the answers to these questions, a parking lot can be added as an additional facility to the reservation with the option to divide up the lot across multiple events.

3.1.53 Describe limitations an administrative user can place regarding time boundaries (ie: can the administrator prevent reservations after either a standard date (Ex: 12/31/22) or a relative date? (Ex: 12 months in the future).

Facilitron allows districts to restrict availability based on any requirements. Typically availability is set to restrict use during the school day (i.e. 7am-3pm), at night (after 10pm) and after a certain date. Districts typically release availability seasonally or at the beginning of each school year to allow their internal staff time to input school schedules before releasing availability to the community.

3.1.54 Describe the ability within the Solution to differentiate time boundaries by user or user role (ie: when reservations are opened for a new year can specific roles/users be granted priority access prior to others?).

Facilitron has the ability to create a custom link that can be shared with priority users to request space prior to releasing availability to all renters.

3.1.55 Describe the ability within the Solution to differentiate time boundaries by location (ie: can a school site have different time boundaries that the district office? Can different users be granted access at different locations?).

Facilitron can differentiate availability based on location. In order to differentiate by user, districts would need to use a custom link to allow users to request space that is otherwise unavailable to the general public.

3.1.56 Describe how a requestor can schedule recurring reservations, including the ability to set an end date.

Requestors can select the facility they need and either pick the dates they need manually (if the schedule is inconsistent) or create a recurring schedule by selecting the time slot, day(s) of the week, and end date for their event.

3.1.57 Describe how recurring events are affected by time boundaries imposed by administrative users (ie: if users cannot schedule events after 12/31/22, but a recurring monthly event is set to end 6/30/23, how does this show in the Solution?).

Facilitron will not allow a requestor to finalize their request with dates outside the schedule boundaries. In the case of an external renter, any date selected outside the boundary would appear in red and notify the renter that those dates are unavailable for request. Internal requestors would be notified with a popup window regarding a scheduling conflict.

3.1.58 Describe the ability for requestors to change one scheduled meeting independently of the sequence of other recurring events (ie: one Monday practice is moved to Wednesday, but all others remain on Monday).

Making a change to an individual time slot is very simple in Facilitron. External requestors will need to submit a change request and notify the district of the schedule update that needs to be made. Depending on their role, internal staff will be able to modify external and internal schedules by selecting the individual time slot they would like to change, select a new time, date, or facility, and apply the changes.

3.1.59 Describe how the system supports requestors in resolving individual conflicts when scheduling a recurring meeting. For example, if a meeting occurs every Tuesday evening in the same conference room, but that room is booked during two of the recurrences, what is the requestors experience? Does the Solution identify the conflicts and allow the requestor to select an alternate resource for that date while making the initial reservation, or do they have to remove those dates from the recurrence before successfully scheduling the meeting?

The process for addressing conflicts is a little different for internal vs. external requests. For external renters, any unavailable dates will appear in red to notify the renter those dates/times are not available. The requestor will be given the option to select another time/date or a different facility prior to submitting their request. Internal requestors will be notified in the reservation details page of the conflict and will allow staff to select another time, date or facility for their event.

3.1.60 Describe how the Solution supports ad hoc recurrence scheduling (i.e., using a date picker for recurring meetings that don't follow a traditional recurrence pattern).

Facilitron has two options for creating a recurring schedule, Select My Dates or Repeat Weekly. By choosing the Select My Dates option, requestors will be able to create an ad hoc recurring schedule using a date picker to select random dates that their event will occur.

3.1.61 Describe the capability within the Solution to assist requestors with cancelled or declined/unapproved reservations by redirecting them to alternate available resources.

Facilitron provides districts with an all-inclusive partnership that includes turn-key implementation, a dedicated Account Manager to assist with day-to-day operations and a Customer Support team to assist renters. When a reservation is cancelled or declines, the Customer Support team will work with the renter to reschedule the reservation or another time, date, or facility or can refund the renter based on the district cancellation policy. When a reservation is declined, the Customer Support team will proactively reach out to the renter to repurpose their reservation request.

3.1.62 Describe the capability within the Solution for a requestor to attach documents and/or specific instructions to requests, including how attachments/requests are provided to administrative staff (ie: Does requestor upload while requesting? Is attachment included in separate or original notification email to administrative staff?).

Facilitron has an Upload Documents section that allows requestors to upload any documentation for their reservation. Requestors can either upload from the confirmation window after submitting their request or login to their Facilitron account and add any documentation in the reservation details page. All documentation is stored in the reservation details page and can be pulled up by district staff to review.

3.1.63 Describe what features/views are different for priority users/administrative staff (who may be able to override other requests) when booking recurring meetings. Please include screenshots if possible.

Administrative staff with enhanced privileges will be able to override requests by selecting the Keep and Proceed button as shown in the screenshot below. They will also have a separate section of the reservation details page labeled Time Conflicts where they can see the conflicting events and reschedule the previous reservation to another time, date, or facility.
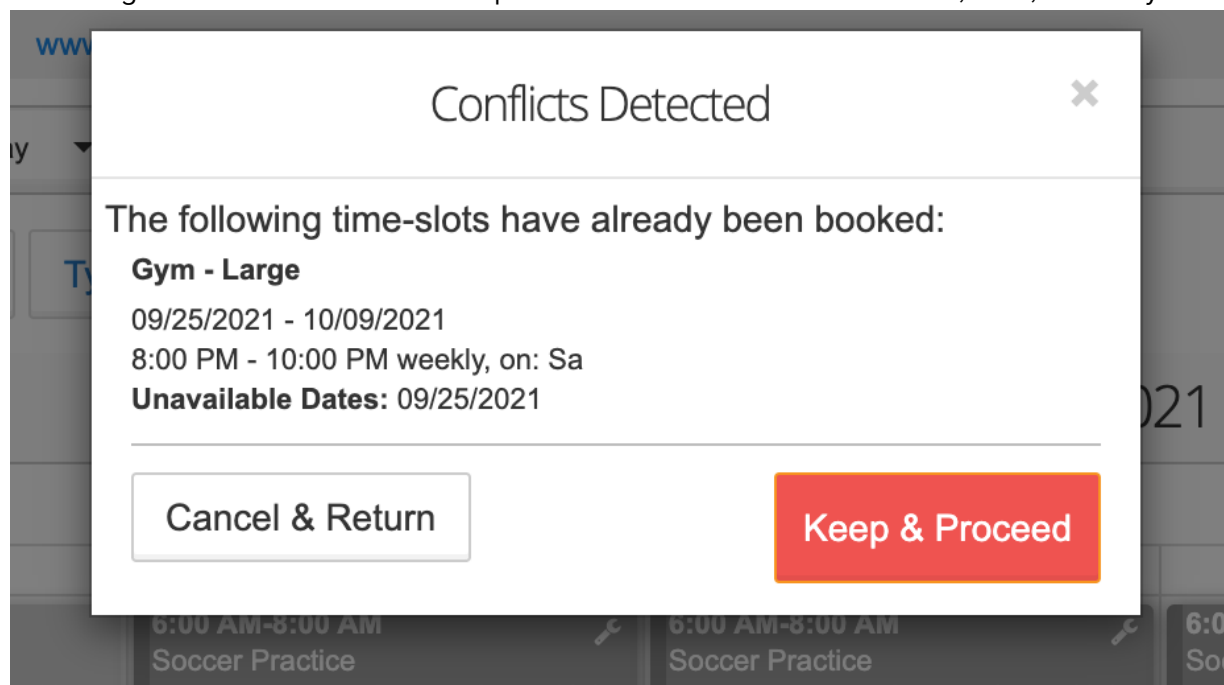
Time Conflicts —

Saturday 09/25/2021

8:00 PM - 10:00 PM	Gym - Large	
8:00 PM-10:30 PM	HQ8K3Z0MDQMY (A)	KK Test Event
8:00 PM-9:00 PM	MN6RTEARUU38 (A)	Schedule Override

3.1.64 Describe options available for integrations of reservation information with digital displays and web-based calendars.

Facilitron creates custom iCal links for each reservation that can be subscribed to to auto-populate web calendars such as Google, Apple or Outlook. These links can be shared with external groups or used to populate district or school calendars. Using the Calendar Management tool in the platform, custom calendars can be created and subscribed to based on specific criteria (such as time of day, day of the week, facility, specific reservations, etc.) allowing the district to create calendars like after school events, high school athletics, after-school enrichment programs, etc.

3.1.65 Describe available digital signage and public displays available for purchase from Vendor or subcontractors and any associated costs. Be sure to include all costs in Appendix C.

Facilitron's Marketing Team is happy to work with the district regarding any digital signage or public displays needed.
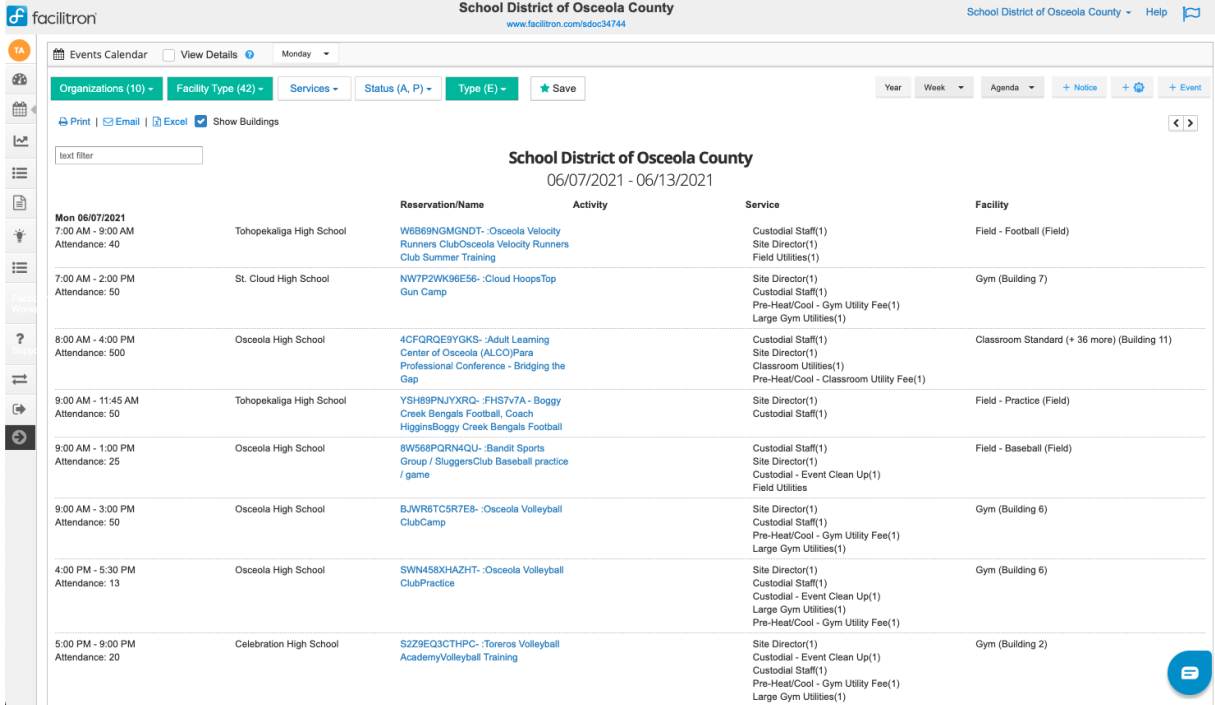
facilitron.com

For information about leasing this space:

facilitron®
We bring communities and spaces together.

EDUCATION TECHNOLOGY
JOINT POWERS AUTHORITY

3.1.66 Describe general usage reports and what formats are available in the Solution (lists, calendars, etc.).

Facilitron provides usage reports in a number of formats. Using the Calendar, districts can filter for usage based on location, facility type, services, status and reservation type. Usage can be viewed in a traditional calendar view or an Agenda view will all usage listed out. Facilitron also tracks hours of utilization in the Utilization Summary report. This report provides a comprehensive analysis of total facility usage (by hours), filtered by District staff use, community group use, facility type, school, or District wide. If Facilitron conducts a Cost Analysis for the district, 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.

3.1.67 Provide samples of general usage reports available in the Solution.

East Side Union High School District
www.facilitron.com/esuhsd95133

demo@facilitron.com

- Dashboard
- Calendar
- Setup
- Reports
  - Revenue Bookings
  - Rental Revenue
  - List of Renters
  - **Utilization**
- Reservations
- Other Accounts
- Sign Out

Utilization Report

Last 30 Days — This Month — Jan 03, 2019 to Feb 02, 2019 — Retrieve

By Owner — By Renter — Internal — External — Details

text filter — Copy — Excel — CSV — Print

Showing 1 to 53 of 53 entries

Renter	Facility Owner	Hours	Charges
SILICONANDHRA MANABADI	Evergreen Valley High School	45	
4-H Youth Development Program	East Side Union High School District	6	
Aborn Institute	Mt. Pleasant High School	50	
Adelante Academy	Mt. Pleasant High School	2.5	
American Indian Alliance	Mt. Pleasant High School	7.92	
Andrew Hill Youth Football	Andrew P. Hill High School	3	
Asociacion de Futbol de San Jose	Independence High School (ESUHSD)	3.5	
BAM NJB	Piedmont Hills High School	23	
Basketball Development League of San Jose (BDL)	Andrew P. Hill High School	14	
California Tamil Academy	Mt. Pleasant High School	72	
Christian Worship Center	Mt. Pleasant High School	149	
Devotional Associates of Yogeshwar - San Jose	Silver Creek High School	44	
Echo.Church (Formerly South Bay Church)	Santa Teresa High School	64	
Escuela Popular High School	Independence High School (ESUHSD)	8	
Fancy Dancers	Piedmont Hills High School	13	
fidel Castaneda	Mt. Pleasant High School	12.5	
Focused Integrated Training	Evergreen Valley High School	29	
GIAC HANH BUDDHIST CENTER	Yerba Buena High School	12	
Journey City Church	Independence High School (ESUHSD)	14	
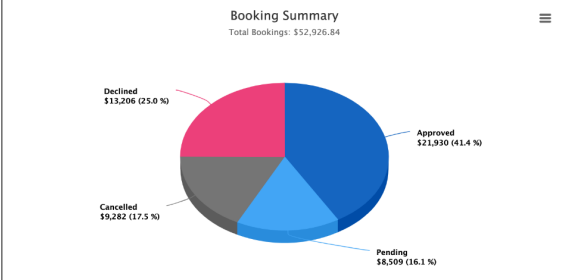
School District of Osceola County
www.facilitron.com/sdoc34744

School District of Osceola County — Help
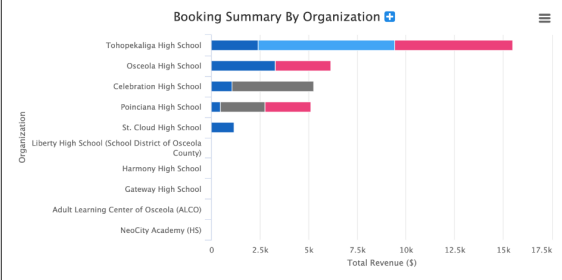
Custom — 03/01/2021 — 03/31/2021 — Retrieve — Export to PDF

Booking Summary
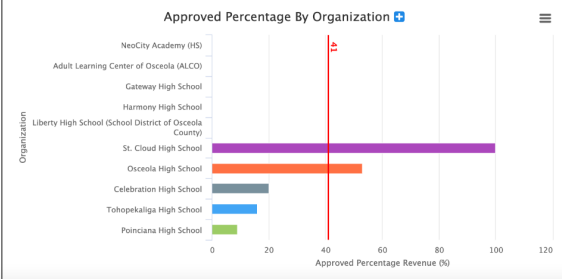
Booking Summary
Total Bookings: $52,926.84

Declined $13,206 (25.0 %)
Approved $21,930 (41.4 %)
Cancelled $9,282 (17.5 %)
Pending $8,509 (16.1 %)
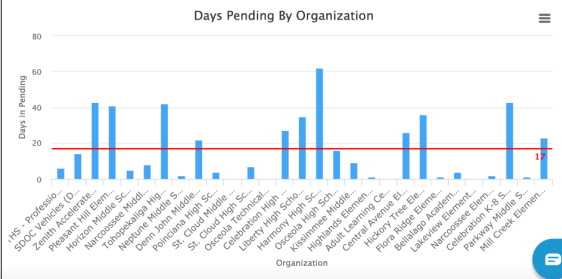
Booking Summary By Organization

Tohopekaliga High School
Osceola High School
Celebration High School
Poinciana High School
St. Cloud High School
Liberty High School (School District of Osceola County)
Harmony High School
Gateway High School
Adult Learning Center of Osceola (ALCO)
NeoCity Academy (HS)

0 2.5k 5k 7.5k 10k 12.5k 15k 17.5k
Total Revenue ($)

Approved Percentage By Organization

NeoCity Academy (HS)
Adult Learning Center of Osceola (ALCO)
Gateway High School
Harmony High School
Liberty High School (School District of Osceola County)
St. Cloud High School
Osceola High School
Celebration High School
Tohopekaliga High School
Poinciana High School

0 20 40 60 80 100 120
Approved Percentage Revenue (%)

Days Pending By Organization

Days in Pending

80
60
40
20
0

Organization

118

	Total Requests			Approved			Pending			Declined			Cancelled		
	#	Policy $	Actual $	#	P. $	A. $	#	P. $	A. $	#	P. $	A. $	#	P. $	A. $
Abraxas High School	12	$14,118.31	$9,635.86	9	$6,418.13	$2,126.26	0	$0.00	$0.00	3	$7,700.18	$7,509.60	0	$0.00	$0.00
Adobe Bluffs Elementary School	49	$94,226.57	$18,579.57	27	$39,065.34	$5,016.19	1	$2,016.00	$1,075.20	20	$29,205.23	$10,787.18	1	$23,940.00	$1,701.00
Bernardo Heights Middle School	104	$347,296.24	$147,967.23	69	$124,268.00	$25,955.55	0	$0.00	$0.00	22	$209,190.00	$117,320.25	13	$13,838.24	$4,691.43
Black Mountain Middle School	43	$227,860.43	$211,013.46	32	$35,799.40	$21,959.00	1	$680.40	$0.00	6	$182,464.52	$182,459.10	4	$8,916.11	$6,595.36
Canyon View Elementary School	28	$19,339.85	$3,626.09	24	$17,383.80	$2,468.04	0	$0.00	$0.00	4	$1,956.05	$1,158.05	0	$0.00	$0.00
Chaparral Elementary School (PUSD)	48	$33,417.22	$12,582.37	29	$20,011.43	$7,026.64	1	$3,480.75	$1,058.40	14	$5,670.18	$3,436.83	4	$4,254.86	$1,060.50
Creekside Elementary School	55	$62,324.00	$16,191.35	40	$45,505.62	$11,459.52	1	$9,040.50	$604.80	5	$2,091.60	$1,109.85	9	$5,686.28	$3,017.18
Deer Canyon Elementary School	54	$110,158.41	$24,361.55	26	$51,277.28	$6,625.00	1	$1,953.00	$520.80	18	$13,609.07	$11,431.90	9	$43,319.06	$5,783.85
Del Norte High School	317	$759,883.03	$519,993.53	183	$380,979.52	$164,556.34	3	$3,082.80	$1,344.00	93	$284,539.03	$271,595.50	38	$91,281.68	$82,497.69
Del Sur Elementary School	63	$125,397.02	$36,138.24	31	$50,867.37	$14,074.20	3	$37,878.75	$5,235.75	18	$20,700.95	$10,248.20	11	$15,949.95	$6,580.09
Design 39 Campus	64	$203,958.16	$104,154.64	36	$67,944.20	$46,737.39	0	$0.00	$0.00	16	$45,119.73	$17,722.33	12	$90,894.23	$39,694.92
Garden Road Elementary School	44	$39,381.74	$20,630.11	24	$14,460.39	$1,712.16	1	$3,276.00	$1,008.00	11	$16,315.95	$15,213.45	8	$5,329.40	$2,696.50
Highland Ranch Elementary School	77	$59,800.45	$21,590.04	55	$38,490.43	$7,482.71	0	$0.00	$0.00	18	$18,802.03	$13,797.73	4	$2,507.99	$309.60
Los Penasquitos Elementary School	49	$186,929.97	$29,351.40	33	$124,912.19	$10,547.13	0	$0.00	$0.00	8	$29,031.16	$3,338.18	8	$32,986.62	$15,466.09
Meadowbrook Middle School (PUSD)	24	$38,898.72	$19,123.66	11	$13,936.99	$3,065.92	0	$0.00	$0.00	5	$8,818.43	$6,418.13	8	$16,143.30	$9,639.61
Mesa Verde Middle School	105	$908,549.43	$410,870.65	68	$269,276.00	$57,679.64	0	$0.00	$0.00	19	$608,826.52	$333,506.15	18	$30,446.91	$19,684.86
Midland Elementary School	46	$42,787.89	$16,900.15	29	$21,600.21	$4,921.35	0	$0.00	$0.00	13	$17,480.13	$9,089.33	4	$3,707.55	$2,889.47
Monterey Ridge Elementary School	48	$49,006.43	$17,967.27	30	$20,847.23	$7,346.22	2	$16,506.00	$1,915.20	12	$8,988.30	$6,292.95	4	$2,664.90	$2,4
Morning Creek Elementary School	63	$123,216.53	$45,082.58	41	$76,325.31	$23,250.92	1	$521.64	$555.24	18	$42,045.42	$20,411.22	3	$4,324.16	$86

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 school performance overview that compares the actual cost recovery with District 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 school, each individual facility, or even by individual reservations.

List of Renters: An overview of each renter organization utilizing district 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 districts to ensure equity among all renter groups at their district 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 District staff use, community group use, facility type, school, or District wide. If Facilitron conducts a Cost Analysis for the district, 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 districts with KPIs that help to provide insight into the efficacy of current policies and practices. These KPIs provide insight into a district's facility use program and allow districts to begin to see trends and make updates in real-time.

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

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

> **Rental Revenue Summary:** The Rental Revenue Summary allows districts to analyze renter demographics, revenue generated for each school site, and revenue by external groups utilizing district 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 districts 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 schools understand the cost to operate district facilities on a per-hour basis. Facilitron helps districts arrive at recovery costs based on the district's actual costs, including utilities and staffing, and combining metrics like square footage and amortization.

3.1.69 Describe what detailed location/site reports are available to systems administrators and local site reservation approvers and what metrics are available (ie: location use, resource type use, date range, start & stop time/time of day).
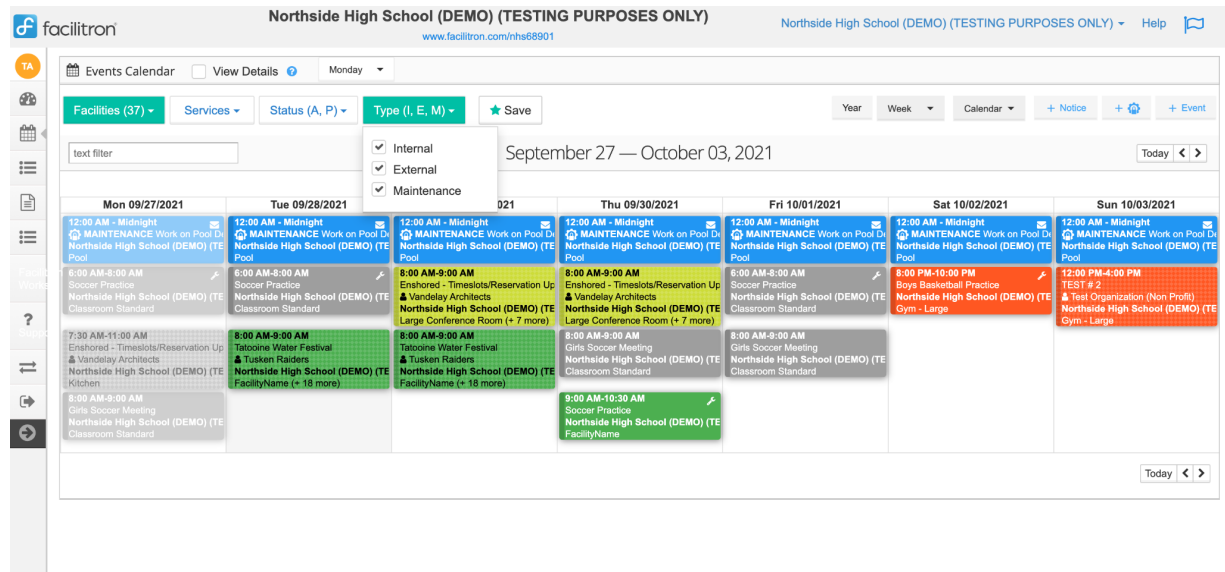
All of the reports listed in 3.1.68 are accessible to the system administrators and local site approvers, the only difference is that the reports are tailored for only their location. The Executive Summary is generally reserved for district level staff but can be made available to site admin upon request during account configuration.

3.1.70 Describe how reports include information related to resource unavailability due to maintenance and site modifications.

Facilitron uses the Maintenance Blocks feature to block off availability and indicate when specific facilities are undergoing maintenance. This can be clearly seen by administrative staff

through the calendar, as well as the Maintenance Blocks Manager report which includes information on upcoming maintenance to be performed, dates/times of maintenance, as well as the ability to send email communications to internal staff regarding the maintenance directly from the report.

3.1.71 Provide samples of detailed location/site reports.

3.1.72 Describe how administrative staff should enter restrictions related to resource use in the Solution (ex: onsite childcare has exclusive use of certain resources after hours).

All availability restrictions can be set up during the implementation process and can be tailored by location, facility type and time of day. Any adjustments to the availability schedule can be made by talking to the district Account Manager.

3.1.73 Provide details about post-occupancy surveys available within the Solution (ie: standard survey questions, if survey questions are customizable, who survey results are routed to, if survey results can be routed to multiple staff members. etc.). Be specific about whether post-occupancy surveys can be targeted by location, resource type or requestor type (e.g., internal vs. external user).

Currently, Facilitron does not have the ability to send post-occupancy surveys within our Scheduling and Reservation system. The only surveys currently offered through the platform are post-work order surveys to assess a requestor's satisfaction with the maintenance service provided. Adding surveys to the scheduling system are on the roadmap, but no release date has been set.

3.1.74 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

Facilitron also offers districts a way to easily manage who's in their building with Attendee Management. Attendee Management creates an easy way for event managers to establish a record of visitors to campus facilities. With flexible registration, check-in and reporting.

For Facilitron partners, attendee management is built into the administrative interface and available to use with each approved reservation. Facility renters may also access attendee management for use with registering participants for their events, allowing event coordinators and facility operators to access lists of participants who attended for the possible needs of contact tracing.

As with all Facilitron product features, the attendee management tool is included in all our partnerships at no additional cost.

On Facilitron's roadmap is a plan to build out Attendee Management to a fully integrated Registration system and completing the rollout of our Building Automation System to control lighting, locks and HVAC, which is currently in Beta.

3.2 Internal User Resource Reservation

	Yes	No	P	C	Comments
3.2.1 Confirm that the Solution supports sending messages/emails to internal requestors directly from the user interface.	X				
3.2.2 Confirm that if a resource is already scheduled an internal requestor can message/email the individual who has already booked the resource directly from the user interface.	X				
3.2.3 Confirm that internal requestors can input the number of certificated staff attending events when resources are scheduled so staff can determine the number of required substitutes.	X				

3.2.4 Describe communication from the Solution to internal requestors (ie: reminder emails about pending required information, emails prior to an event if all required information has not been received and reservation is not finalized, email confirming that reservation has been approved/finalized, etc.). Please be sure to describe how the status for requests are clear to internal requestors. **

Facilitron sends automatic email notifications regarding incoming requests, changes, missing information and when payment is due. Facilitron's Customer Support team will actively reach out to any renters with upcoming reservations that are missing insurance, automatically send invoices for payment due and log all communication in the comments and history sections so that internal staff are kept up to date via email. With each reservation, internal staff is able to quickly check on the approval process, document verification and payment status in the Reservation Details page.

3.2.5 Describe what details internal users can see when a resource is unavailable and to what extent this is customizable (Ex: See that the pool is unavailable because there is a swim meet, because an external requestor has reserved it, because of re-surfacing, or due to cleaning).**

Internal users are able to access the calendar and see a complete list of activities occurring across their school site and/or the district. Internal users can filter the calendar for the date and facility they are interested in reserving and see when the facility is available before placing their request. All external reservations, internal schedules and maintenance blocks will appear on the calendar for internal users to see to avoid any double bookings.

3.2.6 Describe communication from the Solution to invitees to events (ie: can internal requestors enter contact information for invitees? Will the Solution email them with an invitation?).

In the Reservation Details page, contact information is automatically logged for the requestor and an optional point of contact can be designated by the district for any events. Any additional invitees can be emailed directly through the system with the event information and an option to add the event to their personal calendar. Facilitron also has a feature called Attendee Management that allows a requestor even more functionality to invite guests to register for an event, custom screening questions, and a post-event attendee report.

3.2.7 Describe capabilities of the Solution to provide calendar invites to invitees (Will the Solution email them a calendar invite they can accept to add to their calendar?).

Invitees can be emailed directly through the system with the event information and an option to add the event to their personal calendar.

3.2.8 Describe capabilities of the Solution to place reservation requests through internal requestors' calendars (such as a requestor reserving a resource through their Outlook calendar).

Facilitron does not currently support placing a reservation through an external personal calendar such as Google or Outlook. Facilitron can push information to a personal calendar, but all reservation requests must originate in the system.

3.2.9 Describe capabilities of the Solution to check staff calendars for availability for requested times (ie: can an internal requestor check calendars of invitees prior to placing a request?).

No, Facilitron does not have the ability to look at personal calendars of invitees prior to placing a request. Facilitron only manages resource availability and does not serve as a personal calendar for attendees.

3.2.10 Describe capabilities of the Solution to send meeting reminders to internal requestors and invitees.

With Facilitron's capability of pushing event information to personal calendars, invitees that add an event to their personal calendar will have all the alert capabilities and functionality of that calendar (i.e. Google, Outlook, iCal, etc.). Using Attendee Management can also notify invitees of upcoming events they're registered for.

3.2.11 Describe the Solution's ability to allow internal requestors to eliminate custodial or IT support when placing a request if not required.

Assuming they have the privilege to edit a reservation, editing/removing a service is very simple in Facilitron is very simple. In the Reservation Details page there is a services section, simply click the edit button and adjust or remove the service. The adjustment can be made for a single time slot or applied to all time slots.

3.2.12 Describe the capability for administrative staff to post an internal requestor Fee Schedule within the Solution for requestors to view (for after hours or additional dedicated support).

Facilitron is able to automatically configure rates into the system for any number or rate groups/categories. Currently Facilitron does not have a location for districts to post all internal rates for viewing; these rates remain programmed into the system and will auto-calculate costs based on parameters set by the district and board policy.

3.2.13 Describe the Solution's ability to track costs specific to each resource (Ex: an internal user is only charged for after-hours custodial and wants a reservation through 8pm. School A's standard hours go to 5pm and School B's standard hours go to 7pm for custodial and IT support. The requestor would be charged for 3 hours of support at School A and 1 hour of support at School B).

Facilitron can set up any number of custom fee schedules in the system to account for different hours of operation and costs associated with specific services and equipment. The district can have a district expanded rate category for after hours use that could be applied to internal reservations that have charges attached.

3.2.14 Describe the Solution's ability to differentiate and calculate the cost for customized requests (such as air conditioning, technology support, or additional custodial support after standard business hours).

During the implementation process, Facilitron creates custom service tables with hourly rates configured based on a variety of parameters (i.e. time of day, weekday vs weekend, holiday, etc.). When a request is placed that requires services such as HVAC or tech support, those fees will be automatically calculated and added to the reservation total.

3.2.15 Describe the capability within the Solution for administrative staff to over-ride costs (waive or discount costs calculated by the Solution).

With the appropriate role, administrative staff always have the ability to override costs or waive any fees precalculated by the system. All changes made to fees will be logged in the history section for auditing purposes and will be reflected in the Revenue Bookings report to track the delta between board policy and adjust rates.

3.2.16 Describe how internal requestors can input account codes to charge for costs associated with their requests.

Account codes, also known as budget codes, can be inputted into the system, with configuration as to which sites they can apply to, and who has access to input them. This provides robust flexibility. On given internal reservation requests, these account codes can be selected by individuals with permission at the configured sites, to apply to the reservation request and offset costs.

3.2.17 Describe how the solution supports chargebacks to internal requestors for additional services and facilities use (e.g., integration with financial/accounting system, or generation of CSV report of charges for a specific period). Be specific about how the Solution supports tracking pending payments and chargebacks that are completed.

The Rental Revenue report tracks all monies collected for rent, equipment and services. This

report can be an overview by school, each individual facility, or even by individual reservations and can be filtered by any date range. The report can be exported as a CSV file and imported into the schools finance system.

Administrators can access individual summary reports for all account codes used in a given period, and can then drill down to a more detailed report with specifics for that code to see all requests it was applied to, with further breakouts of amounts applied. These reports can be exported into CSV format for import into additional systems.

3.2.18 Describe functionalities within the Solution that allow internal requestors to input the number of certificated staff expected at an event and how the Solution notifies staff (ex: when scheduled a professional development event the requestor can enter that 100 certificated staff will attend and staff is notified so they can schedule 100 substitutes).
Internal requestors can utilize Attendee Management to invite staff, survey how many certificated staff will be attending, and make arrangements for substitutes. All registered staff will receive an email notification regarding the upcoming event and will be able to add it to their calendar.

3.2.19 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.
All functionality has been described above.

3.3 External User Resource Reservation

	Yes	No	P	C	Comments
3.3.1 Confirm that the Solution can be set up for different available resources for external requestors (Example: internal requestors can request laptops but external requestors cannot).	X				
3.3.2 Confirm that external requestors cannot view details of other requests (they see only availability of resources and not who booked a resource, why it is unavailable, etc.).	X				
**3.3.3 Confirm that the Solution can prevent requests from being submitted and/or confirmed if all required information/documentation has not been received. **	X				

3.3.4 Confirm that the Solution has an external requestor portal that allows external requestors to set up account information and keep on file for future use.	X				

3.3.5 Provide details regarding the Solution's ability to require specified information/documentation prior to a request being submitted and/or confirmed (ie: an external user must provide organization information, agree to requirements, upload insurance documents and waivers prior to a request being accepted and routed for processing or prior to the request being entered as confirmed and a reservation being finalized).

External requestors must create a Facilitron account either for individual use or for their organization. Their rate category will be automatically assigned based on board policy, which will tailor their user experience when requesting facility space. During the online application process, requestors will be required to answer customized questions depending on their group type and the facility they are requesting. They will be required to agree to the district's terms and conditions and provide event insurance to satisfy board policy requirements. Finally they will be taken to the payment page where they will see their tailored service and rental fees and may be required to pay a portion or all of their rental fee based on district payment policy.

Once a request is submitted, it triggers the approval workflow for that facility/request type. Facilitron's Customer Support team will also jump into action on verifying their COI, invoicing for any remaining balance and collecting any payments due prior to the event start. Administrative staff at the district/school sites will be notified of the pending request and will be able to review the reservation, make any updates needed and provide their approval. Facilitron's Customer Support Team and the district's administrative staff will work simultaneously to ensure all details are finalized upon final approval.

**3.3.6 Describe communication from the Solution to external requestors (ie: reminder emails about pending required documents/information, emails prior to an event if all required documents and information has not been received and reservation is not finalized, email confirming that reservation has been approved/finalized, etc.). Please be sure to describe how the status for requests are clear to external requestors. **

Facilitron sends automatic email notifications regarding incoming requests, changes, missing information and when payment is due. Facilitron's Customer Support team will actively reach out to any renters with upcoming reservations that are missing insurance, automatically send invoices for payment due and log all communication in the comments and history sections so that internal staff are kept up to date via email. When a reservation has been approved, external requestors will see a blue approved sign at the top of their reservation details page and a link to their permit; renters will also be notified via email that their reservation has been approved. All statuses are clearly communicated with color coded labels at the top of the reservations details page.

3.3.7 Describe the functionality within the Solution for external requestors to set up account information and keep it on file for future use (ie: an external requestor can input required information and documentation and keep it on future for future requests).

External community renters are required to create a Facilitron account that not only allows them to place their request with a custom checkout process, but also allows them to store documentation and required information in their account to reduce double entry. Examples of documentation organizations can store include non-profit status, certificates of insurance, contact information for event contacts, etc.

3.3.8 Describe the functionality within the Solution to archive external requestor accounts after a period of inactivity and to what extent this can be customized (Ex: archive accounts after 90 days or 6 months of no submitted requests).

Facilitron does not archive inactive accounts due to the fact that some organizations operate seasonally and make requests that fall outside of a 90 day or 6 month window. An organization's account is not exclusive to a single district and allows a user to reserve space at any facility on the Facilitron platform; so while inactive at one district, an organization may be placing requests at various locations outside the district.

The List of Renters report is however able to be custom filtered for active reservations within a certain date range allowing the district to easily see who their current active renters are. This report will only log reservations made by organizations requesting district facilities.

3.3.9 Describe functionality within the Solution to track expiration dates of required documents and prevent additional requests from being submitted and/or confirmed until required documents are updated (Ex: An external user wants to reserve a resource after their insurance or non-profit status expired).

Facilitron utilizes OCR technology to verify documentation uploaded by renter organizations. All documentation is logged in the reservation details page with the dates of coverage and will be labeled in green as "Valid" next to current documentation. Any previous documentation will also be logged in the system for audit purposes and be labeled in red as "Invalid."

When a document is set to expire, particularly if a renter has a longstanding reservation that exceeds the valid documentation, Facilitron's Customer Support team will receive an alert and actively reach out to the renter to obtain updated documentation prior to expiration. If for any reason Facilitron's Customer Support team is unable to procure valid documentation prior to an upcoming event, the team will reach out to the district for further instructions on how to proceed (i.e. cancel the event, allow an exception, etc.)

3.3.10 Describe functionality within the Solution to notify external requestors and administrative users of upcoming expiration dates of required documents and prevent future requests until information is updated with current documents (ie: an external user's insurance or non-profit status expires).

When a document is set to expire, Facilitron's Customer Support team will receive an alert and actively reach out to the renter by email and phone to obtain updated documentation prior to expiration. If for any reason Facilitron's Customer Support team is unable to procure valid documentation prior to an upcoming event, the team will reach out to the district for further instructions on how to proceed (i.e. cancel the event, allow an exception, etc.)

3.3.11 Describe the functionalities within the Solution to restrict availability of specified resource attributes/non-location resources from external requestors (ie: internal requestors can request laptops and external requestors cannot).

Facilitron creates a digital catalog of district facilities during the implementation process and labels facilities that are able to be rented by external groups and those that are restricted to internal staff. Facilities that are labeled as unsearchable will not appear on the district/school storefronts of the external rental portal and will not be available for request by community members. The same functionality exists for services and equipment; external community groups will only be permitted to request available non-location resources.

3.3.12 Describe the functionalities within the Solution to restrict visibility of specified resource attributes from external requestors (ie: internal requestors can view photos and maps, but external requestors cannot).

Facilitron creates a digital catalog of district facilities during the implementation process and labels facilities that are able to be rented by external groups and those that are restricted to internal staff. Facilities attributes will only appear for facilities that are listed as searchable to external renters.

3.3.13 Describe if specified attachments can be restricted from external requestors (ex: seating configuration attachments are available, but maps and photos are not) and what security measures are in place to keep room photos and location maps private.

Currently there is not a way to restrict specific attachments for facilities that are labeled as searchable to external renters on the Facilitron platform.

3.3.14 Describe the capability for administrative staff to post an external requestor Fee Schedule within the Solution for requestors to view.

Fee schedules are configured into the system based on board policy and are calculated automatically based on group type. For example, if a non-profit group is placing a request, they

will only see the rates that they are approved for within the system. This reduces calls to the district with questions about their rate category and requesting a different group rate.

3.3.15 Describe how costs can be differentiated to appropriately calculate reservation costs. Costs should be minimally able to be differentiated by the requestor type (non-profit, other businesses), type of facility, and services needed.

During the implementation process, Facilitron will configure unlimited rate categories based on district policy and practices and will assign all existing renter organizations to a rate category. Rate categories will include fees for facility use, services and equipment. When a renter logs into their Facilitron account, they will see their rates automatically calculated based on their rate category. Typical rate categories are non-profit, commercial, district internal, and district expanded.

3.3.16 Describe how costs can be calculated and stored for each resource. For example, do system administrators need to set a flat fee for each resource or can costs be calculated based on a series of components (rental cost by square foot, hourly custodial costs, add on fees for a type of facility).

Each rate category will have a rate table that lists all fees for facility use, services and equipment. Fees are generally set as a flat hourly rate, but Facilitron is able to configure multiple rate tables for variations in fees such as holiday or weekend rates, after hours, etc.

3.3.17 If component costs as described above are supported, please describe how those costs are maintained in the system. For example, can a system administrator maintain global rental costs by square foot for a type of resource (pool, gymnasium, theater)? Can the global rate be updated with a specific effective date and have the updated costs be applied to all future reservations?

Any updates to rate tables or rate categories can be made by reaching out to the district's dedicated Account Manager. Rates can be updated to have an effective date and be applied to all future reservations.

3.3.18 Describe the ability for the solution to add costs for minimally required services for the reservation (e.g., required custodial services)

Facilitron will configure service costs within the rate table and can identify services as mandatory or optional and shared or dedicated. Mandatory services will be automatically added to reservations that meet those parameters, whereas optional services will be listed as part of the checkout process for renters to request. Shared services are often assigned to custodial staff where one custodian can be assigned to multiple events taking place on campus. Dedicated services are typically reserved for IT and theater staff where a staff member

will need to be onsite for the entire event.

3.3.19 Describe the capability of the Solution to automatically include extended custodial costs and room reservation block for reservations (Ex: A 5 hour reservation includes required additional time and costs for custodial set-up and clean-up, resulting in a 6 hour reservation with additional custodial fees).

Facilitron requires renters to account for setup and tear-down time when placing their reservation request. Additional custodial hours and fees can be added to a reservation that requires a particularly complicated setup or a large event that will require multiple staff to clean up post-event.

3.3.20 Confirm whether the Solution can automatically prompt the user to enter different times for the expected access to the room (for their setup/arrival) and event start time.

Facilitron clearly labels during the checkout process that setup and tear-down times must be included in the reservation request and that the renter will not be permitted on site until the start of their reservation. This information is also listed on the permit that the renter receives when a reservation request has been approved.

3.3.21 Describe the Solution's ability to offer optional add-on services at the time of reservation, technology or audio/visual support, specialized setup requests, or other options as determined by the Participant.

During the checkout process, Facilitron allows requestors to easily add on additional services and equipment to their reservation. Depending upon their rate category, there can be additional fees for these add-ons that will be automatically calculated in their order estimate.

3.3.22 Describe the Solution's ability to differentiate and calculate the cost of services based on standard operating hours (such as air conditioning charges or overtime rates for technology support or additional custodial support after standard business hours).

Rate tables are configured during the implementation phase and can be tailored to differentiate costs during standard operating hours and after-hours or weekends. When a renter is placing their request and a service falls outside the standard hours of operation, an additional fee can be automatically calculated into the order total.

3.3.23 Describe the Solution's capability to calculate total costs for a request, including reservation costs and additional services (what calculations is the Solution capable of?).

Facilitron is capable of calculating the total cost of a reservation request based on a variety of

parameters, including: group type, time of day, day of week, holiday, services and equipment requested and mandated, etc.

3.3.24 Describe when and how requestors are notified of costs. Confirm whether a preliminary estimate of total costs can be presented at the time of reservation or only after validation by staff.

When a renter is placing their reservation request, they will receive an estimated total for their reservation based on their pre-configured board approved rates and when they have requested to use the space. Renters will be notified upon placing their request that the amount is an estimate that is subject to change upon final review from the district. District staff with the appropriate role can always make changes or adjustments to the fees as they see fit and any updates will be reflected in the invoices sent to the end-user.

3.3.25 Describe what acknowledgement requestors make to agree to costs associated with their requests (ie: check a box next to total, type "I agree", etc.). Confirm whether the acknowledgement language/text can be customized by the system administrator.

Renters must agree to the terms and conditions of the district, which can include the payment policy, prior to submitting their request. Facilitron encourages districts to adhere to the "pay before your play" payment best practice to ensure that payment is collected prior to using the facility; if payment is not received by a set number of days before the reservation's start date, the reservation can be cancelled and availability can be released to another group that is able to pay.

3.3.26 Describe the capability within the Solution for administrative staff to over-ride costs (waive or discount costs calculated by the Solution).

Assuming staff have the role and privilege to override costs, staff can make any adjustments necessary. All edits are logged in the Comments and History section of the reservation details page with a date and timestamp for when the change was made and by whom. This log ensures a digital audit of all changes in the event that there is any confusion or questions regarding a reservation request.

3.3.27 Describe how the Solution tracks paid and unpaid costs for requestors.

All payments are tracked in the Reservation Details page. Invoices are automatically generated upon final approval from the district and will be sent out according to the district payment policy. Every invoice that is sent is logged in the system as well as when payment has been received. For longstanding reservations that are billed on a monthly basis, remaining balance will appear at the top of the reservation details page.

3.3.28 Describe cost recovery and/or revenue reports available in the Solution.

Facilitron offers a variety of custom reports to track operational, statistical and financial reporting. Reports can be filtered for any date/time range. Reports include:

Rental Revenue: Provides detailed financial reporting to reconcile revenue to payments. Reporting starts at a high level overview and can be filtered down to see a more detailed breakdown of the individual events and revenue.

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

Utilization: Comprehensive analysis of total facility usage (by hours), filtered by District staff use, community group use, facility type, school, or District wide. If Facilitron conducts a Cost Analysis for the district, 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.

Operational Cost Analysis: Facilitron can conduct an Operational Cost Analysis to help schools understand the cost to operate district facilities on a per-hour basis. Facilitron helps districts arrive at recovery costs based on district's actual costs, including utilities and staffing, and combining metrics like square footage and amortization.

3.3.29 Describe how cost recovery and/or revenue reports can be filtered/sorted (ie: by location, by resource type, by requestor, etc.).

All Facilitron reports can be filtered for any date range and by site location. The Rental Revenue and Utilization reports can be filtered by requestor, facility type and individual reservation.

3.3.30 Describe any additional cost calculation/reporting features available within the Solution.

Facilitron provides districts with KPIs that help to provide insight into the efficacy of current policies and practices. These KPIs provide insight into a district's facility use program and allow districts to begin to see trends and make updates in real-time.

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

Bookings Summary: The Booking Summary consists of four KPIs that help districts better understand their approval percentages, number of days pending for rental requests, and the demand for use of district facilities. Each of these reports is segmented by schools across the district to help better understand how each individual

school site is addressing facility use requests.

Rental Revenue Summary: The Rental Revenue Summary allows districts to analyze renter demographics, revenue generated for each school site, and revenue by external groups utilizing district 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 districts 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.

3.3.31 Describe the capability within the Solution to charge an application fee (Ex: $50.00 charge for all external requests). Please describe what this process looks like for requestors ie: When are they notified about fees, when are they billed for fees? How do they confirm acceptable/acknowledgement of fees?).

During the implementation process, the Facilitron team will configure any application fees or security deposits into the system to be automatically added to reservations. The application fee or security deposit will be itemized out in their estimate for the total cost of their reservation. Typically renters will be required to pay the application fee or deposit prior to submitting their request and will not be able to proceed until they have entered in their payment information. Acknowledgement of the fees can be added to the terms and conditions the renter agrees to when placing their reservation request.

3.3.32 Describe the capability within the Solution to require payment (full or partial) prior to submitting a request for processing (Ex: an external requestor must pay the application fee prior to submitting a request and will be billed for actual resource use at a later date).

Facilitron can configure the district's payment policy into the system and prompt requestors to submit payment due at time of submission. If the district's policy is to collect the application fee up front and bill for the remainder of the reservation request upon review and approval by the district, Facilitron is easily able to accommodate this workflow.

3.3.33 Describe the Solution's ability to calculate costs based on requestor type (ie: different fee schedules for internal requestors, not-for-profit external requestors, and for-profit external requestorst).

During implementation, Facilitron will configure unlimited rate categories based on district policy and will assign all existing renter organizations to a rate category. Rate categories will include fees for facility use, services and equipment. When a renter logs into their Facilitron account, they will see their rates automatically calculated based on their rate category. Typical rate categories are non-profit, commercial, district internal, and district expanded.

3.3.34 Describe how external requestors can input payment for costs associated with their request (ie: can they enter a credit card or banking information that will be charged when the request is approved?). Include descriptions of all forms of payment that can be configured in the system

Facilitron handles all payment collections on behalf of the district. Renters have the option to pay by credit card, PayPal, eCheck or my mail. All invoicing is automated within Facilitron and Facilitron's Customer Support team will work with renters to collect payments based on the district's payment policy.

3.3.35 Describe invoicing capabilities within the Solution.

Facilitron sends automated invoices directly through the system that are logged in the payment and history section. Invoicing can be set up to bill for an entire reservation upfront or can be sent on a monthly basis for long standing reservations.

3.3.36 Describe how the Solution reacts when an external user with an overdue balance attempts to submit another request (Ex: the external user notified about the outstanding balance, the request will not process until the outstanding balance is paid, etc.). Confirm the extent to which Participants can configure this capability (i.e., choose to block submission of new requests or present a warning message to approvers).

Renter organizations can be flagged within the Facilitron platform as a problem renter and a notice will be placed on the reservation for any new requests. Approvers will be able to see the flagged reservation and can work with their Account Manager on how to proceed. Renters can be flagged in the system for an outstanding balance, leaving a mess, damage to property, drinking on campus, criminal activity, etc. Due to the fact that organizations are tracked across the platform, if a flagged renter from a neighboring district tries to place a request at your campus, the district staff will also see that alert and can contact their Account Manager to find out more information as to why that renter has been flagged in another district.

3.3.37 Describe what the Solution considers and overdue balance and if this is a customizable timeframe (ex: past 60 days, past 90 days, etc.).

Overdue balances are determined by the district's payment policy. Typically Facilitron suggests that districts abide by the best practice of paying before the reservation begins, but that is up to the district and it's board to decide.

3.3.38 Describe how administrative staff can mark external users as inactive due to non-payment or after a period of non-use (Ex: a requestor has not paid an outstanding balance for 2 months so staff marks them as inactive preventing them from making additional requests).
Renters can be flagged in the system by contacting the dedicated Account Manager for the district. All documentation will be cataloged in the system with a full description of why the renter is being flagged.

3.3.39 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.
Facilitron automatically verifies a group's non-profit status off of the IRS database and will catalog all public record information including their contact information, assets, income, revenue and tax filings for the district to easily review. Having this information at your fingertips makes it easier to make decisions on providing a discounted rate.

3.4 Facility Resource Management

	Yes	No	P	C	Comments
3.4.1 Confirm that the Solution has the capability to include capacity/occupancy recommendations for each resource.**	X				
3.4.2 Confirm that the Solution can retain records of facilities features and systems (e.g., sinks, in-room restrooms, air conditioning, lighting, audio-visual, carpet) for the purposes of determining allowable use and planning maintenance.	X				

3.4.3 Describe who can *access* capacity/occupancy recommendations for resources (administrative staff, architects, other vendors/roles).
Capacity information can be listed on facilities available for external rental. All capacity information will be gathered and configured during the implementation process.

3.4.4 Describe who can *update* capacity/occupancy recommendations for resources (administrative staff, architects, other vendors/roles).
Capacity information is configured during the implementation process and can be updated at any time by the district's dedicated Account Manager.

3.4.5 Describe what limitations to view and/or update capacity/occupancy recommendations of a resource can be placed on different roles (Ex: an architect has permissions to update recommended occupancy numbers, but can not place a reservation or view other resource element information).

Account configuration is currently reserved to Facilitron's staff and can be updated by reaching out to the district's dedicated Account Manager. Facilitron can discuss making configuration updates available to an architect role.

3.4.6 Describe any professional services available to assist with site assessments and gathering information. Please be sure to include the cost here and in Appendix C (hourly rates are acceptable).

During the implementation process, a team of Facilitron staff will come on site to gather resource information such as capacity and accessibility, take photos, and catalog all available amenities and equipment. Facilitron also has a Business Analytics department that can work with the district to gather financial and utilization information to perform a comprehensive cost analysis to assess operational cost and cost recovery. Both services are available to the district at no additional cost.

3.4.7 Describe how the system supports maintaining different capacity/occupancy recommendations for each resource.

All capacity information is logged during account configuration and will be displayed on the facility details page.

3.4.8 Describe how the system supports maintaining different capacity/occupancy recommendations for each resource AND the current or potential use of the resource. For example, does the system support storing different square footage requirements per student based on grade level or classroom type/use. For example, can the system automatically adjust projected capacity at a school if a regular classroom is changed to a science lab or a 3rd grade classroom is converted to Kinder?

Currently capacity information is a set number based on the posted capacity limit for the facility and is not able to be recalculated based on size of persons in the space.

3.4.9 Describe the capability within the Solution to maintain multiple occupancy/capacity targets per classroom/facility type. For example, could a Participant maintain a maximum occupancy as defined by the State in the system as well as target classroom load targets (that may be somewhat lower).

Currently, Facilitron does not support the storage of multiple occupancy or capacity limits

within the system; all occupancy/capacity information is logged based on district instruction or the listed capacity limit for the space based on construction projects.

3.4.10 Describe the capability within the Solution to run projections on capacity based on facilities and/or policy changes (e.g, inputting additional spaces available from construction projects or estimating impact of reducing average class size by 2 students at certain grade levels).

Currently, Facilitron does not run any project calculations for capacity.

3.4.11 Describe capability within the Solution to manage capacity of rooms that may have shared use (Ex: a room is used for moderate to severe special education periods 1 - 3, and band periods 4 - 7).

Facilitron lists a single capacity for the space, at this time there is no variation based on group type renting.

3.4.11.1 Describe the capability within the Solution to track different bell schedules/periods based on site location (Sites may have different bell schedules, also bell schedules may vary depending on holiday/final schedules).

All bell schedules can be set up during availability intake and exceptions can be made for finals or holiday schedules. Facilitron can fully support various bell schedules at different sites.

3.4.12 Describe any capacity/occupancy rate per square foot differences that can be set for different resources (Ex: a multi purpose room can be set for different occupancy recommendations than a classroom).

All occupancy/capacity information is gathered during the implementation site photos and review of site maps. Occupancy will be set based on the individual facility and therefore can differentiate between capacity between an MPR and a classroom.

3.4.13 Describe the ability within the Solution to change the designation of a resource and any restrictions (Ex: only administrative users can change a multi purpose room into a different type of resource).

Facilitron has customizable roles that can be updated at any time to adjust viewing and accessibility for any resource.

3.4.14 Describe the ability within the Solution to require certain features in order to designate a resource for a specific use (Ex: a kindergarten classroom must have access to a restroom).

Resource amenities can be set up in the system and configured as optional or mandatory.

3.4.15 Describe capability of the Solution to compare capacity/occupancy of available resources to projected enrollment

Facilitron cannot currently compare capacity to projected enrollment, capacity filters can be used to select a space but must be filtered for during the reservation request process.

3.4.16 Describe support for running different scenario-based projections on available facilities projected enrollment for different class types/size (ie: reducing class sizes or adding an additional kindergarten class).

Currently, Facilitron is unable to run scenario-based projections on available based on projected enrollment for different class sizes or types.

3.4.17 Describe capability of the Solution to maintain inventory of equipment and furniture, including the current room location, and attributes such as size and style.

Facilitron has a fully integrated work order system that allows districts to maintain inventory of equipment and furniture for a specific location as well as available information regarding the asset.

3.4.18 Describe capability of the Solution to compare available furniture to projected enrollment (Does a resource have enough teachers desks, lower grade elementary desks, upper grade elementary desks, etc.).

Currently, Facilitron does not have the ability to automatically compare available furniture to projected enrollment.

3.4.19 Describe the capability of the Solution to project capacity/occupancy needs based on matriculation of students by grade and program (Ex: elementary moderate to severe special education students moving to middle school).

Currently, Facilitron does not have the ability to project capacity/occupancy.
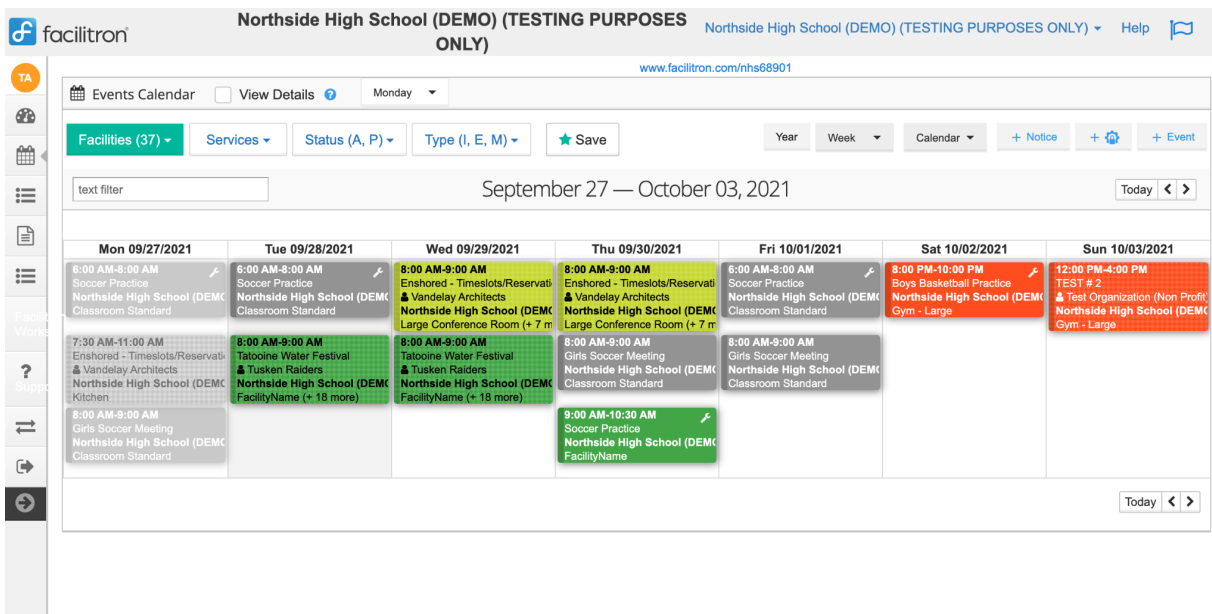
3.4.20 Describe the capability of the Solution to identify possible overflow sites based on attendance (Ex: School A does not have enough occupancy available, but School B is nearby and has extra occupancy available).

Currently, Facilitron does not have the ability to project capacity/occupancy.

3.4.21 Describe capabilities within the Solution to track resources that are in use versus available (Ex: Classroom A is in use periods 1 - 5, but is available periods 6 - 7, or furniture used vs. available for redistribution).

Facilitron can track room availability using the calendar of the scheduling and reservation system. The calendar can be used to track all classrooms and internal class schedules to see which rooms are in use versus available. Facilitron's inventory tracking feature can track any furniture or asset within the room and which assets are stationary versus shared among multiple facilities, buildings or campuses.

3.4.22 Please provide any sample reports available in the Solution to track available resources.

3.4.23 Specify the number of facility elements available for each resource (such as HVAC unit, overhead projector, ceiling tiles, fire alarms, wall systems, restroom partitions, flooring, teacher desks, student desks, additional furniture, chromebook carts, school signs, intrusion systems, kilns, lockers, marquees, PA bell & systems, paint/stucco, exterior wood & doors, interior paint, partitions, playground equipment & turf, plumbing, fixtures, pool & pool facilities, relocatables & relocatable roofs, restroom partitions, roofs, scoreboards, shade structures, siding, tennis courts, theaters, windows, electrical, video cameras, etc.).

Facilitron is able to quickly and efficiently track any number of available elements for each resource. There are no limits to the number of elements.

3.4.24 Clarify if available facility elements or features are pre-established or if Participants can customize categories. If the Solution has set facility elements please list the available elements. If customizable facility elements please describe the process to create elements, functionality available, and any limitations.

Facilitron allows customization of facility elements and features that can be compiled and imported into the system during account configuration. Any availability, limitations or fees surrounding request and use will be gathered during the implementation phase and configured into the system and reflected during the end-user checkout process.

3.4.25 Describe the capability within the Solution to record the age and assessment findings regarding condition of facility elements, including the date of assessments (Ex: The HVAC unit was installed on 1/1/2020 and as of 1/1/2021 the HVAC unit is in good condition).

Using Facilitron maintenance staff are easily able to log the age of asset, warranty information, end of life, and all associated work orders for servicing a particular asset. Facilitron's auto-generated Preventative Maintenance Plan will create an aggregate of information in the system and provide a complete report on the condition of all tracked assets.

📄 PM Plan

Fiscal Year: 2021 ⌄

How to use this feature ▼

White Fleet

ACME Unified School District			
School	**Equipment Name**	**Description**	**Condition**
Mildred O. Ito Elementary School	Van #2014	Econoline 250	Good
Citrus	Ford Truck	Truck	Poor
Maintenance Yard	Utility Truck #2048	Welders Truck	Good

Edit   Generate PDF   Generate All Report

3.4.26 Describe the capability within the Solution to upload pictures (Ex: a photo of a broken door, etc.)
Facilitron allows staff to upload photos directly into the system as either an attachment if working off a desktop or utilizing a devices' camera for phones and tablets. Photos can be easily attached to work orders to log damage, completion, or parts needed to make a repair.

3.4.27 Describe how various conditions of resource elements can be categorized (ie: good, fair, poor, etc.) and how the Solution shows when the most recent assessment was.
Districts are able to tailor their resource condition, but typical statuses may include descriptive rating (good, fair, and poor), a number scale, or star rating.

3.4.28 Describe the capability within the Solution to record details about facility elements (Ex: HVAC unit manufacturer, model number, service provider, etc.).
Maintenance staff is able to record all details regarding a facility element including but not limited to, manufacturer, model number, service provider, warranty expiration, end of usable life/planned end of service, inspection date and schedule, default budgets and cost information for original purchase and repairs.

3.4.29 Check possible/available resource element details available in the Solution. Please add any additional fields available.

Y	DSA number the original construction was approved under
Y	Date of installation (or construction)
Y	Age of resource element
Y	Life expectancy of resource element
Y	Projected replacement date
Y	Square footage
Y	Size/Type of furniture (Ex: teacher, lower grade, upper grade, middle school, high school)
Y	Table top material for desks/tables
Y	Casters for chairs

Y	Adjustable/Non-adjustable
Y	Estimated replacement cost
Y	Repair/Maintenance records including dates
Y	Use status (In use, replaced, etc.)
Y	Previous resource element (what the current element replaced Ex: previous HVAC unit information is available in record for current HVAC unit)
Y	Link to previous resource element records (to create a rolling archive system)
Y	Warranty information & documentation
Y	Service contract information & documentation
Y	Resource building/location
Y	Condition of resource element from most recent assessment
Y	Photos from assessments
Y	Date of most recent assessment
Y	Map resources on GIS/CAD systems including blueprints
Y	Utility specifications (gas shutoff, electrical outlets)

3.4.30 Describe capabilities within the Solution to tag and track resource elements (Ex: tag furniture and track use/age, etc.).

Asset tracking is built into our solution. Facilitron with our thousands of school district partners have made a strategic effort to standardize location tracking to meet Ed Code and ISO standards to achieve a unique common barcode/RFID/tag identifier across all our platforms. The identifier chosen (e.g. barcode, tag) that is used for asset tracking is the same one used for equipment repair, key management, work order location, all utilizing GPS; all of which allows us to conducts tours that are GPS based, as well as provides GPS fencing feature to monitor staff location in case of emergency. The core driver for this standardization is to provide very advanced and detailed location reporting that also supports district Facility Master Plan reporting.

3.4.31 Describe capabilities within the Solution to identify extra/unallocated/available furniture.

All assets can be categorized by type and status that allows for easy identification of surplus furniture. Various aspects such as location, condition and most aspects of the assets profile can be reported including work order service history.

3.4.32   Describe the capability within the Solution to customize details for different resource elements (Ex: Teacher furniture has details about table top material, casters, adjustable/non adjustable, but these details are not options for student desks or HVAC systems).

Facilitron routinely adds less common fields as necessary to accommodate unique needs such as "casters". Presently, we seek to contain all of the international standards (e.g. ISO 9001) and have designed our asset profile to have all needed components necessary for oversight.

3.4.33 Describe any capability of the Solution to map resources on GIS and/or CAD systems including blueprints.

Works (the official name of our work order system) has built in document management to house property, asset, and work order documentation. At the school level, documents are commonly technology cut-sheets, fire egress, shut-off locations; for assets documentation is typically MSDS sheets and warranty info (also tracked on the profile itself) with links of course to related work orders, and the work orders too have uploads to capture photos of work, estimates and project info.

3.4.34 Describe the capability of the Solution to include resource utility specifications (Ex: gas shutoff, electrical outlets, etc.).

Our document management (built into the work order system) is designed for this very purpose. Property maps can be uploaded in an unlimited capacity to capture every type of possible need. Document upload size is unlimited, and accepts all common file formats.

3.4.35 Describe the capability within the Solution to reflect changes to resource elements (what is the process to replace, archive, or get rid of resource elements?).

All uploadable elements have management buttons that allow for removal or replacement as needed.

3.4.36 Describe the capability within the Solution to keep a record of previous maintenance, planned maintenance, and upcoming site modifications in one place (Ex: see the date a HVAC unit was installed, the dates work was done, and the planned replacement date).

Yes. Each asset is tracked and has its own work order history that can be easily reported from the asset itself or via our report generator (in addition to our numerous canned reports).

3.4.37 Describe the capability within the Solution to track partial upgrades/replacements of resource elements at a location (Ex: some rooms at a site have upgraded HVAC units while others do not).

Our built in PM Plan report was designed for California's Coalition of Adequate School Housing (CASH) as part of their student certificate training curriculum. It provides management a built in district status report with 1-button-print capability that produces a pdf document snapshot of the district's asset condition. The report includes all assets, all properties, all locations.

3.4.38 Describe the ability within the Solution to group resource elements by building/location (Ex: All HVAC units for the 500 building at School A can be grouped separately than HVAC units for the 400 building at School A).

The work order system is designed with resource/asset reports, location reports, report generators, exporting; there are literally dozens of reports and methods all of which contain building/location/asset info; to be able to manage the useful life of equipment and asset status, and location activity/status, for facility master plan, planning & maintenance budgeting.

3.4.39 Describe the capability within the Solution to prioritize different resource elements for maintenance (Ex: an HVAC system that is old or in poor condition shows as requiring maintenance).

Priority nomenclature is built in with color coding to help identify emergencies from high, from low etc. The priority naming convention is dynamic and can be added too, or edited to match any need with unlimited properties.

3.4.40 Describe the capability within the Solution to make resources unavailable in related reservation system(s) based on maintenance and site modifications (Ex: when new carpet is being installed a resource is shown as unavailable).

Facilitron is truly unique by having a fully integrated suite where our "Rule Based Work Orders" along with "Maintenance Blocks" allow our system to automatically restrict location from being used. An example is a maintenance block to prevent a field from being reserved whilst a project is conducted requiring its closure.

3.4.41 Describe the capability within the Solution to override and cancel reservations in related reservation system(s)based on maintenance/site modifications (Ex: when new carpet is installed previous reservations are cancelled).
The system administrator (the district) has absolute authority and power to cancel/pause/or allow overrides. The best practice is to use the maintenance block feature, which is like a reservation that blocks out the space for a time frame. This prevents others from requesting the space as the blockout marks it as not-available.

3.4.42 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.
All functionality has been listed and described above.

3.5 Work Orders

	Yes	No	P	C	Comments
3.5.1 Confirm that the Solution can convert resource requests that require maintenance or technology support into work orders automatically.	X				
3.5.2 Confirm that the Solution includes an integrated maintenance work order system or can send data/integrate with a third party work order system.	X				

**3.5.3 Describe how the Solution converts resource requests into work orders or integrates with work order systems. **
With unlimited recurring work order profiles, these profiles are scheduled like a recurring meeting. Work orders are created dynamically and automatically. These profiles can be applied to asset work orders as well (e.g. quarterly HVAC service).

**3.5.4 Describe how the Solution supports differentiated routing of work orders by originating site and/or issue type (paint, lock, grounds, etc.).
We've designed Works to be configurable to allow multiple methods of work flow. The typical flow is when an originator submits the work order, it is then routed to their approver (e.g. office manager) who approves, causing it to forward to maintenance. All notices are electronic and automatic. Additionally, based on priority or purpose or status, there are various notification rules that trigger notification emails to alert senior staff to emergencies.

3.5.5 Describe roles and permissions available in the system to restrict access to submit work orders (e.g., school front-office designee) and differentiated roles to support approval and distribution of work orders.**

Users are identified by their unique email address (system requirement), with each user having a role specific to their approval position. Each role is designed to a specific user group, i.e. office managers are "Approvers", a teacher role is "Originator", etc. Passwords are encrypted and utilize Secure Socket Layer security.

3.5.6 Describe how many trades can be included in one work order (Ex: a door needs to be replaced and trade supervisors for paint and locksmith can be included in one work order instead of submitting two separate work orders). How does the system support tracking multiple tasks related to the same core project or issue.

A work order can track unlimited trades and can be done as a single work order, or a single work order can be marked as a "project" work order which then lets it be associated with other work orders (i.e. a project work order has an overarching parent work order with children work orders associated with it). Our system is designed to support projects and project related work orders use their status to trigger emails that trigger action from various staff. Individually, project work orders themselves have unlimited tasks, Gantt Charts, and can be used to create punch lists to aid in project completion/close-out.

3.5.7 Describe how work orders can be referred to others within the Solution (Ex: The manager forwards a work order to the paint department supervisor who forwards them to separate paint technicians). **

Both work order and the various search screens have [Forward] buttons that allow the user to email the work order to others on demand. Additionally, we've integrated email alerts to trigger upon updates to certain common settings such as status changes, purpose change, priority changes. By a user updating these key setting os a work order, this allow sus to trigger email to automatically alert a user if for example a work order for a "playtoy" is created, or is a status is set to a common phrase such as "Pending Risk Dept review of HazMat" which can trigger emails to the insurance department.

3.5.8 Describe how priority of work orders is indicated (Ex: low, medium, high OR non-maintenance, reactive maintenance, routine, preventative OR numbered work orders OR customizable priority levels).**
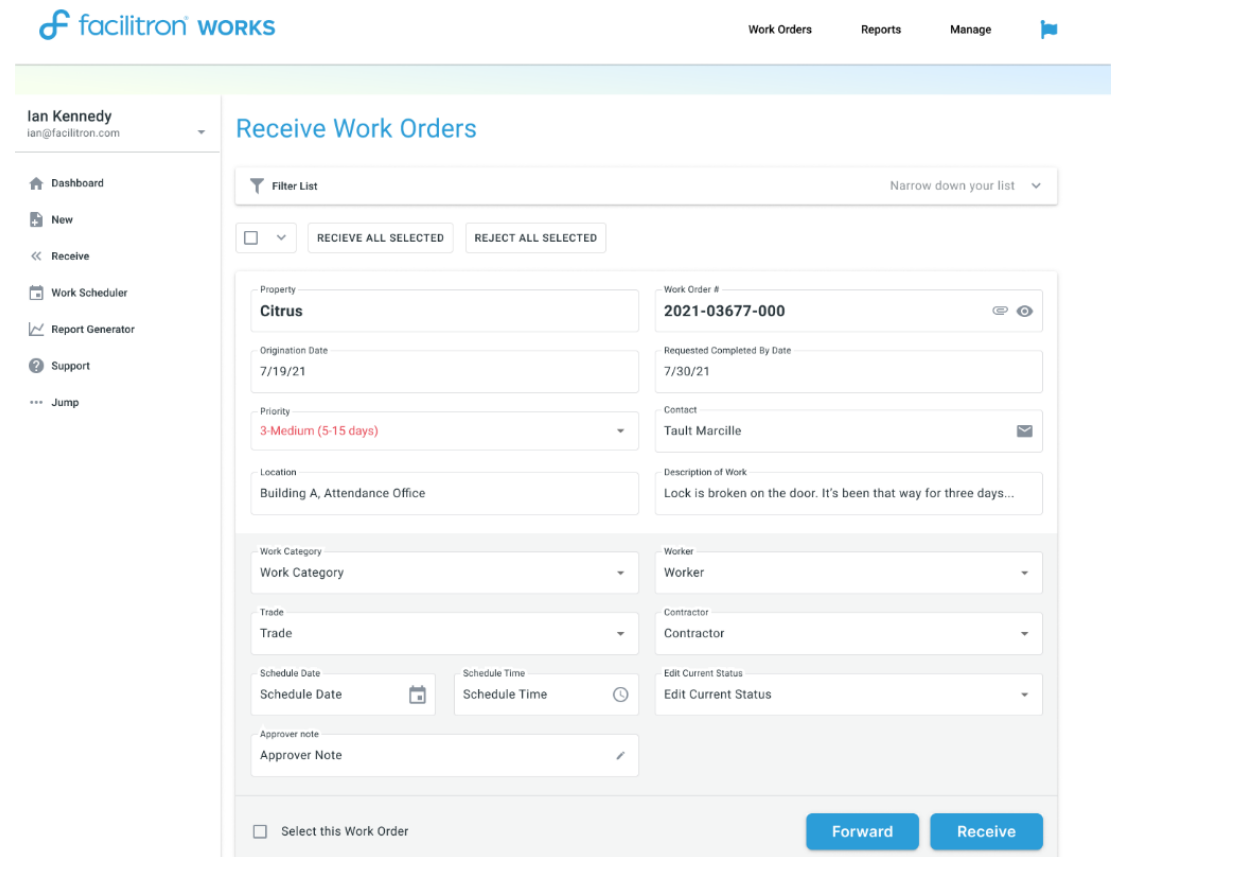
Priority is set up to the exact needs of the customer. There is no limit to how many or what they are called. That said, with our expert level implementation team know from hundreds of district partners what thievery best practices are and will in conjunction with District staff set up the system to the individual district needs.
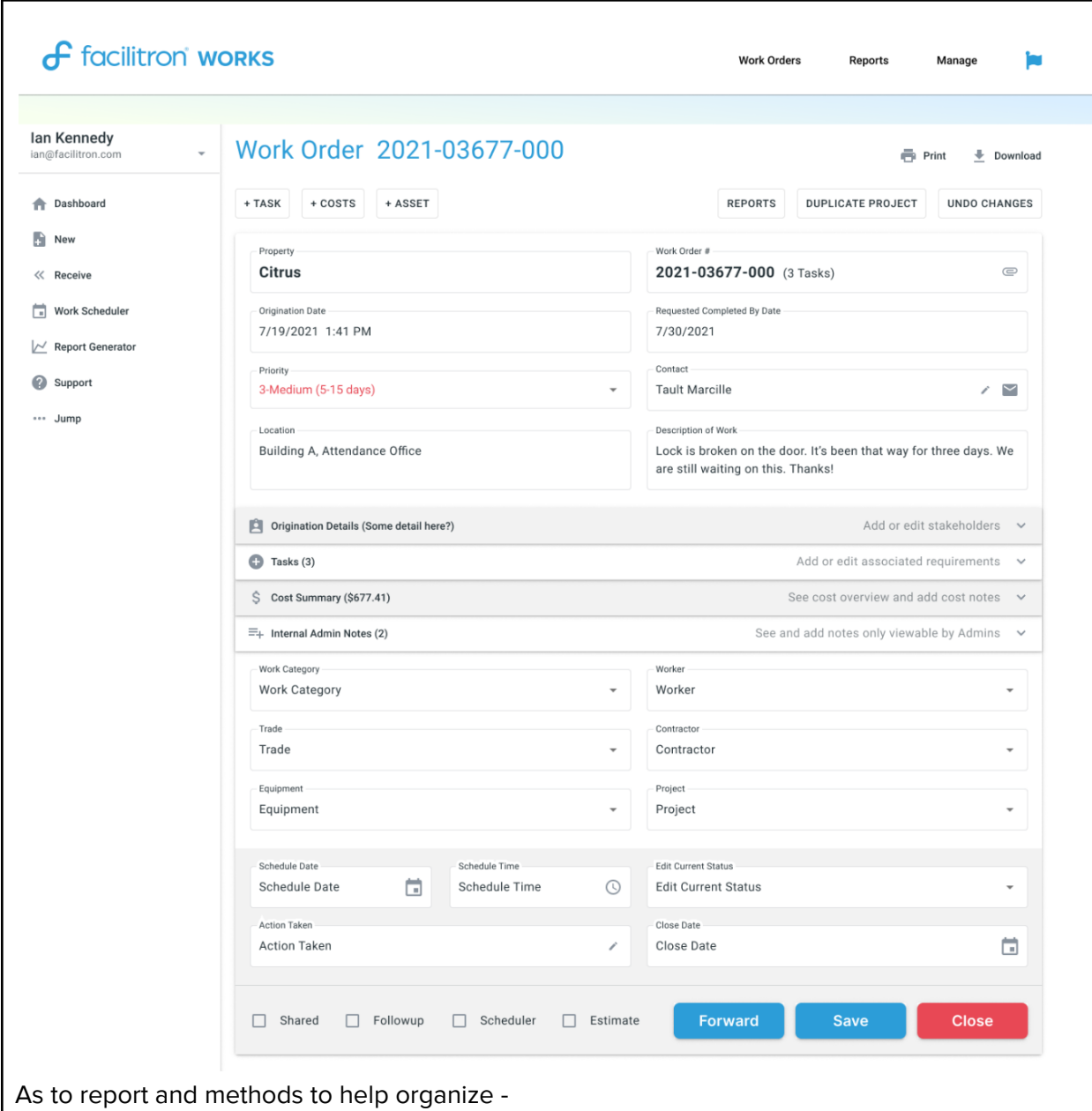
3.5.9 Describe any functionality within the Solution to escalate emergency work orders (ie: are they marked urgent, categorized differently, notice sent to additional contacts, etc.).
The work order "Priority" choice is color coded to highlight emergency work orders. This color coding is also present on the Receive screen (the in box for all incoming work orders)   The best practice is to call in an emergency of course, but then follow that up with a work order for proper cataloging of the event. With our priority-based email triggers (we also have triggers for purposes, status, low inventory, stagnant work order, customer work order reports),

3.5.10 Describe visibility of current work orders available within the Solution. Provide screenshots of views or reports available to help organize the work of assigned staff and management/department leads.
Each user is able to view individual work orders and sees details, limited to their role. A originator (e.g. night custodian) at a school for example sees only the work orders they themselves submit, an Approver (e.g. principal) sees all of the work orders at their site. The maintenance staff see everything on the work order (see below snapshot) with numerous items being configured so as to limit what the technicians can edit (i.e. you may elect to prevent technicians from editing the work order description and other configurable fields). Below is the work order receive screen et al.

As to report and methods to help organize -

3.5.11 Describe visibility of work order history available within the Solution.

Work order history is tracked, logged, and conveniently accessed from the work order itself.   In addition to capturing events, emails, costs; other items of historical importance are also captured such as Action Taken, all the costs, various notes fields, and even when the "Quiet Update" is clicked.

History 2021-03677-000

Date	User	Status	Notes
2/19/2021 9:11:59 AM	teault@facilitron.com	Approved	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque hendrerit.
2/19/2021 9:11:59 AM	teault@facilitron.com	Approved	Lorem ipsum dolor sit amet, consectetur adipiscing elit.
2/19/2021 9:11:59 AM	teault@facilitron.com	Approved	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque hendrerit.
2/19/2021 9:11:59 AM	teault@facilitron.com	Approved	Lorem ipsum dolor sit amet, consectetur adipiscing elit.
2/19/2021 9:11:59 AM	teault@facilitron.com	Approved	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque hendrerit.
2/19/2021 9:11:59 AM	teault@facilitron.com	Approved	Lorem ipsum dolor sit amet, consectetur adipiscing elit.
2/19/2021 9:11:59 AM	teault@facilitron.com	Approved	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Pellentesque hendrerit.
2/19/2021 9:11:59 AM	teault@facilitron.com	Approved	Lorem ipsum dolor sit amet, consectetur adipiscing elit.

3.5.12 Describe how the Solution categorizes work orders for different facility elements and any limit to the number of elements (Ex: HVAC, school signs, intrusion systems, kilns, lockers, marquees, PA bell & systems, paint/stucco, exterior wood & doors, interior paint, partitions, playground equipment & turf, plumbing, fixtures, pool & pool facilities, relocatables & relocatable roofs, restroom partitions, roofs, scoreboards, shade structures, siding, tennis courts, theaters, windows, electrical, video cameras, etc.).

A "Work Category" choice is associated with every work order. The work category concept is an industry best practice developed by Facilitron to create standards of similar work. For example, the work category "ballast replacement" is known to take about 20 minutes. So, we automatically tie work categories to Key Performance Indicators so that the District can compare its performance of "ballast replacement" to industry best practices to determine efficiency of their staff. This is all done simply by choosing a work category, the reporting results are automatic. The results can be used for employee evaluations, determining staff development needs, and improving overall productivity.

3.5.13 Describe the extent to which the Solution is pre-programmed with components of a work order and to what extent it is customizable by Participants. If the Solution is pre-programmed with work order components, describe available options regarding how each component can be completed (ie: fill-in field, drop down selections, or other format. Ex: when selecting a location does the requestor type in their location or select from a list).

Facilitron Works is renowned for its configurable setup to provide the District with options! Our team works with District staff to determine and set up the configuration to achieve District objectives. Having been designed by M&O Management, the number 1 thing was simplicity for users. To that end, Works features simple user interfaces, but super advanced automation that Facilitron staff configures and sets up for you that; auto-assign workers based on work category, property, purpose; email triggers for emergency work orders, HazMat location warnings; and many more; all of them configurable by the District, and all will be thoroughly talked through with District staff to make it turn key for the District.

3.5.14 If the Solution is pre-programmed with work order components, check which elements are included. Please add additional elements available in the Solution.	

Yes	Site location
Yes	Room location/additional location details
Yes	Submitter contact information
Yes	Description of the required maintenance
Yes	Priority (Ex: low, medium, high)
Yes	Trade (Ex: paint, plumbing, general, etc.)
Yes	Pictures (Ex: a photo of a broken door, etc.)
Yes	Assigned technician (entered after the request has been assigned)
Yes	Supplies used (entered after the work order has been completed)
Yes	Cost of repair/maintenance (entered after the work order has been completed)
Yes	HazMat location warning on work order
Yes	Action Taken Log per work order to denote if multiple trips and actions taken.
Yes	Schedule Date and time
Yes	Carbon Copy's of work order originator(s), that sends update emails to multiple people.
Yes	Gantt Chart - for project work orders

3.5.15 Describe any automated messaging functionalities within the Solution to communicate with requestors (ie: is an email sent automatically when updates are made to a work order or when a work order is closed out?).

Works is designed with high communication and automation at each turn. Update Emails automatically trigger to the work order originators upon updates, separately updates to the work order itself can trigger a multitude of emails based on Purpose, Property, Priority, or Status. These email alert triggers allow the system to automate approvals (e.g. budget approval, Risk Management approval) saving District critical time and money. Additional email alert triggers include a Work Order Origination Alerts by Property, Stagnate Work Order Alerts,

Low Inventory Alert, and a Report Scheduler feature that automatically emails a user any saved Report Filter, e.g. a weekly open work order report on Monday and a closed work order report on Fridays.
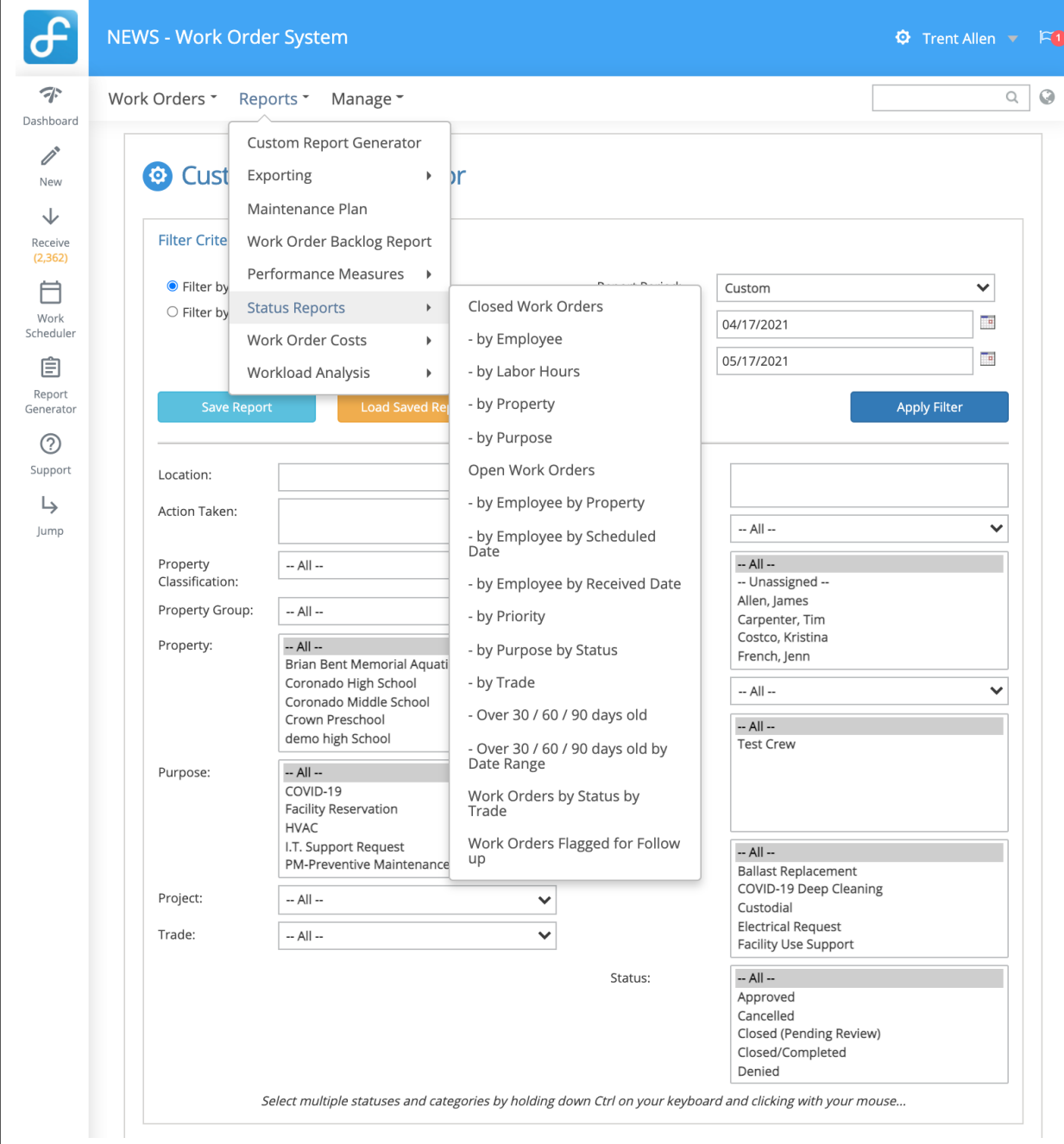
3.5.16 Describe how work orders are updated and closed out after work has been completed.

A typical District will have the worker record costs and close the work order using a mobile device. Works is optimized for mobile devices and also has a separated but included mobile application. Districts using the "Review & Close" business model (where the worker closes the work order but the supervisor does the final review and "close"), will have the extra step of the supervisor reviewing an inbox of staff work orders that were closed pending the supervisor's review. This step is so that the supervisor can review each worker activity, identify any unusual activity (or lack of), providing the supervisor with situational awareness. Alternatively, for Districts using paper, the process is: worker records time and material on printed work order form, then routes it to the M&O front office; the front office enters the work order number in the search area of the web site and it pulls up the work order; enter the time and materials under the costs section, click the Close button; recycle the paper.

3.5.17 Describe reports available in the Solution (Ex: daily reports, weekly reports, reports by trade, reports by site, reports by technician, expense/supply reports, chargeback reports, overdue work order reports, facilities use v. maintenance reports, etc.).

Works was designed by school districts to be a complete maintenance department management system. In addition to several dozen school district designed canned reports, its reporting capabilities include custom report generators, full exporting of work order data, costs focused canned reports and a cost focused custom report generator. A unique Works feature is our "Schedule Report" feature that lets the user set up a recurring email that automatically sends them a Works Report as a PDF on a schedule. Users love this feature, they email themselves an open work order report on Monday and a closed work order report on Friday to gauge how they are doing.

3.5.18 Provide sample reports available in the Solution.

EDUCATION TECHNOLOGY
JOINT POWERS AUTHORITY

| Pasadena USD Work Order System | ⚙ Trent Allen ▼ ⚑ |

Work Orders ▾   Reports ▾   Manage ▾

Select Report ▼

⚙ Open WO's - Over 30 / 60 / 90 days

Filter Criteria

Aging: ○ 1 Day   ○ 30 Days   ● 60 Days   ○ 90 Days   By: ● Received Date   ○ Scheduled Date   ○ Completed Date

Property: -- All --   Trade: -- All --   For: All Work Orders
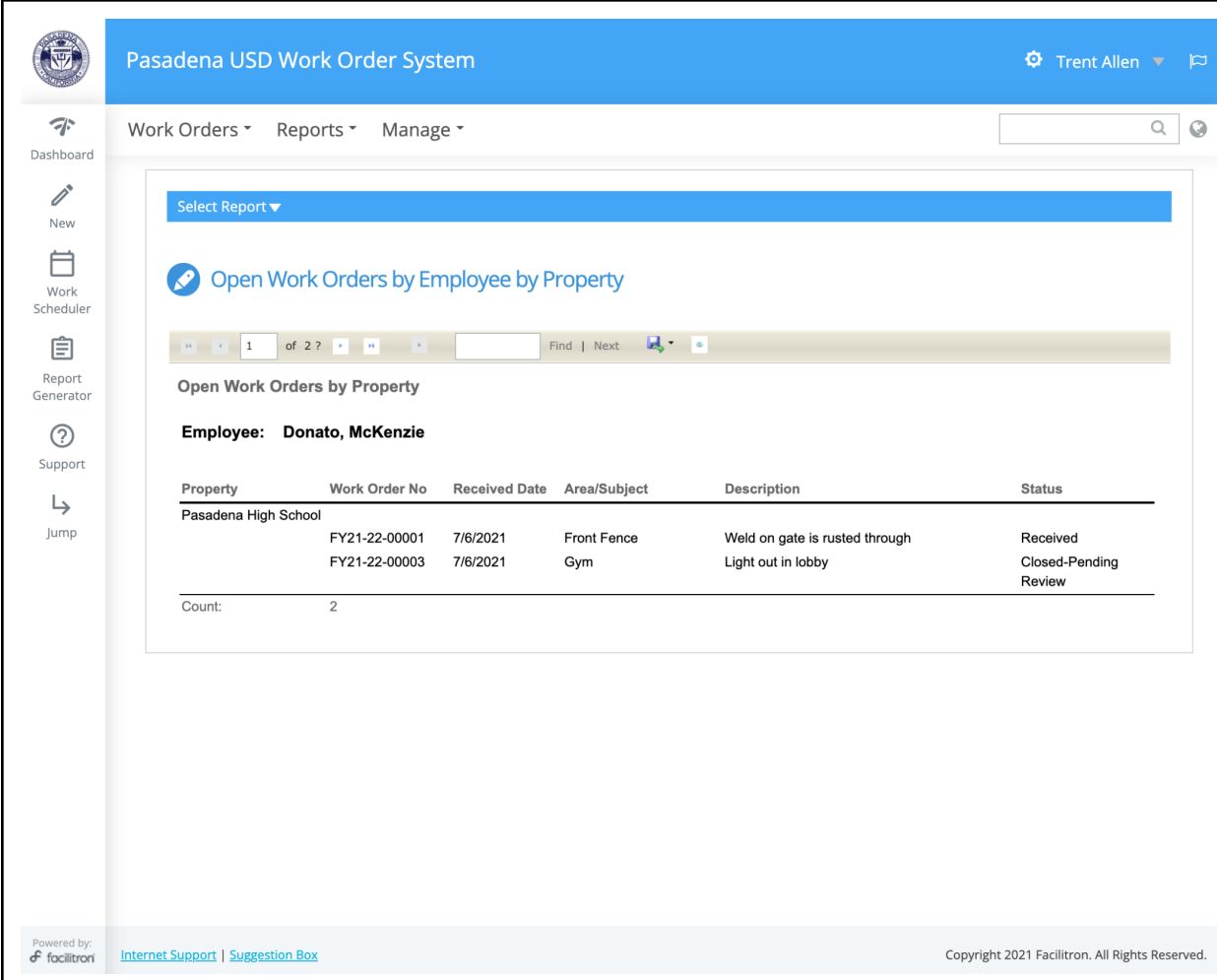
Apply Filter

Pasadena USD
Pasadena USD Work Order System

Open Work Orders - Over 30 / 60 / 90 Days
9/28/2021

Work Order #	Campus	Received	Scheduled	Trade	Location	Description	Current Status
FY21-22-00001	Pasadena High School	7/6/2021			Front Fence	Weld on gate is rusted through	Received
FY21-22-00002	Pasadena High School	7/6/2021			Cafeteria	Roof leak above back door	Received
FY21-22-00003	Pasadena High School	7/6/2021			Gym	Light out in lobby	Closed-Pending Review

Work Order Count: 3

154

3.5.19 Describe expense reporting available within the Solution (Ex 1: A work order for a plumbing issue requires a U pipe and the technician incurs mileage. What reports are available to show the cost of the U pipe and mileage? Ex. 2: A report is pulled for a provider of U pipes to see what dollar amount has been spent year-to-date with that provider).

Works is used by numerous Department of Educations throughout the state of California; which means we support full account code structures, budgets by Fiscal Year, allocation of expenses across budgets (i.e. splitting cost by percentage), in volumes exceeding the largest of districts. Works cost reporting includes over a dozen canned reports, exporting, and a custom report generator which can email you the same report on a schedule automatically. Cost information can be printed directly from the work order itself as sampled below for a vandalism scenario (i.e. the work order print-out is acting as an invoice support document). Many of the reports were written to be used in Excel, Word, or PDF to provide Districts options.

WO#	FY21-22-04415	Date Entered:	9/23/2021 4:08:09 PM
Requestor:	Tom Rayburn	Phone:	
Site Name:	Coronado High School	Location:	Cafeteria, Multi-Purpose Room
Trade:		Assigned to:	Worker, Test
Priority:	High	Sched Date:	
		Req'd by Date:	
Description:	*Repair vandalism of water fountain near north exit. See Risk Management (KN) for any questions.*		

EMPLOYEE SPECIFIC LABOR

Date	Employee	Hours	Rate	BudgetName	Total
9/23/2021	Hasselhoffman, Matthew	1.000000	35.0000	GF - General Fund	$35.00
9/23/2021	Plumber, Vince	4.000000	40.0000	GF - General Fund	$160.00
9/23/2021	Allen, James	1.000000	35.0000	GF - General Fund	$35.00
Subtotals:		6.000000			$230.00

TRADE RATE LABOR

There are no trade rate labor-related transactions for this work order.

MATERIALS

Date	PO Number	Item	Supplier	Total
9/23/2021				$250.00
Subtotal material cost:				$250.00

OTHER COSTS

There are no other cost transactions for this work order.

Total Hours: 6.00   **Total Costs:** $480.00

⚙ Custom Report Generator

Filter Criteria

● Filter by Date Created
○ Filter by Date Closed

Report Period: Custom

From: 09/04/2021

To: 10/04/2021

[Save Report] [Load Saved Report] [Schedule Report] [Apply Filter]

Location:		Desc:	
Action Taken:		Reports To:	-- All --
Property Classification:	-- All --	Worker:	-- All -- / -- Unassigned -- / Cabral Roofing FN / Cleveland, Bradley / Draney, Carol / Fischer, Sam
Property Group:	-- All --		
Property:	-- All -- / Adult School / Anahiem West / Bus 200 / Citrus / Education Center	Priority:	-- All --
		Crew:	-- All -- / Carpet Cleaning Crew / Custodial North / Custodial South / General Maintenance 2904 / HVAC Crew 2903
Purpose:	-- All -- / COVID-19 / Equipt Repair / Fleet Vehicle Service / Grounds / HVAC Request	Category:	-- All -- / Aerate Field / Ballast Humming / Bobcat / BRAKE / CABINET MAKING
Project:	-- All --		
Trade:	-- All --		
Contractor:	-- All --	Status:	-- All --

3.5.20 Describe parts inventory tracking and supply reporting available within the Solution (Ex: A work order for a plumbing issue requires a U pipe. What reports are available to show supply usage and flag the need to order an additional U pipe?).

Facilitron Works has both asset tracking and consumable inventory management. Our system design expects a receiving event (e.g. API, physical input, importing) that credits the inventory, the debit occurs when either the worker submits an inventory request via a request form built into the work order system, or it's debited when the worker associates it to a work order as a cost. There are reports for both inventory management, costs per work order, inventory inventory warnings, a low inventory email alert, and can support bar codes. Below is a typical inventory list.

Filter Criteria

Bar Code ID		Type	Show All ▼
Item Name		Supplier	Show All ▼
Stock Number		Remember Search Filter ☐	

Apply Filter

Select	Our Stock Number	Bar Code ID	Name	Type	Current Inventory	Inactive
Edit	F24x10x1		Air Filter 24x10x1		1999.00	☐
Edit	F22x10x1		Filter 22x10	HVAC Filter	1935.00	☐
Edit	TP		Toilet Paper		600.00	☐
Edit	0		Water Fountain Kit - 2 Fixture	Other	99.00	☐

3.5.21 Describe how the Solution supports site chargebacks (ie: How does the Solution track cost, payment, and budget information for work requested by sites?).

One of the very 1st custom reports ever created was the "Chargeback Report", below is the evolved version of that. Our reporting exports to a variety of styles from ledger style, to spreadsheets where the budgets broken out onto different tabs of the workbook. Costs are associated during the close process; each inventory item as well as labor have budgets associated with them for allocating expenses.

	A	B	C	D	E	F	G	H
1							Charge to site AMOUNT (Debit)	To M&O AMOUNT (Credit)
2	SCHOOL SITE/DEPT	WORK ORDER NUMBER	ORDER DATE	DESCRIPTION	DATE CLOSED	ACCOUNT NUMBER		
3	Northside High School	FY19-20-00402	4/14/2020	Michelle WolfeyReservation #XLF3SAFOI8G5	9/17/2021		35.00	
4	NEWS Unified School Distric	FY21-22-04390	9/14/2021	broken sprinkler head center of field	9/20/2021		3.99	
5	NEWS Unified School Distric	FY21-22-04390	9/14/2021	Test Workerbroken sprinkler head center of	9/17/2021		26.25	
6	NEWS Unified School Distric	FY21-22-04390	9/14/2021	Unassigned broken sprinkler head center of	9/20/2021		-	
7	Coronado High School	FY21-22-04413	9/23/2021	James AllenLeaky faucet	9/23/2021		70.00	
8	Coronado High School	FY21-22-04415	9/23/2021	Water Fountain Kit - 2 FixtureRepair vandali	9/23/2021		250.00	
9	Coronado High School	FY21-22-04415	9/23/2021	Matthew HasselhoffmanRepair vandalism of	9/23/2021		35.00	
10	Coronado High School	FY21-22-04415	9/23/2021	Vince PlumberRepair vandalism of water fou	9/23/2021		160.00	
11	Coronado High School	FY21-22-04415	9/23/2021	James AllenRepair vandalism of water founta	9/23/2021		35.00	
12	Coronado High School	FY21-22-04364	8/27/2021	Filter 22x10HVAC not working	8/27/2021		15.00	
13	Coronado High School	FY21-22-04364	8/27/2021	HVAC not working	8/27/2021		50.00	

3.5.22 Describe role-based permission capabilities within the Solution related to reports (Ex: All reports available to managers, trade-specific reports available to trade supervisors, site-specific reports available to site admin staff, expense/supply reporting available to purchasing staff).

Users are identified by their unique email address (a system requirement), with each user having a role specific to their position. Each role is designed to a specific user group, i.e. office managers are "Approvers", a teacher role is "Originator", etc. With that design; each user's access is custom to that role. As a result school based users see activity limited; for example an Originator role only sees work orders they themselves have created, an Approver for the same school gets to see everything at their school, District maintenance staff see all schools and their roles are again limited to the function of their position (e.g. workers see very limited information, front office see most, managers see everything. The system was designed by M&O management, so the focus is very maintenance management centric.

3.5.23 Describe the capability of the Solution to provide automated notice for overdue work orders (Ex: a weekly report auto-generated to the manager and/or trade supervisors showing work orders over 30 days old).

Yes, Facilitron Works covers that, in several ways. Foremost, our Stagnate Work Order Report is an automated email alert that triggers whenever a work order hits a chosen number of days old (either by its scheduled date or received date). Second, with graphs and reports that cover 30/60/90 Days Old; that allows supervisors and managers to actively monitor staleness or growth of volume.
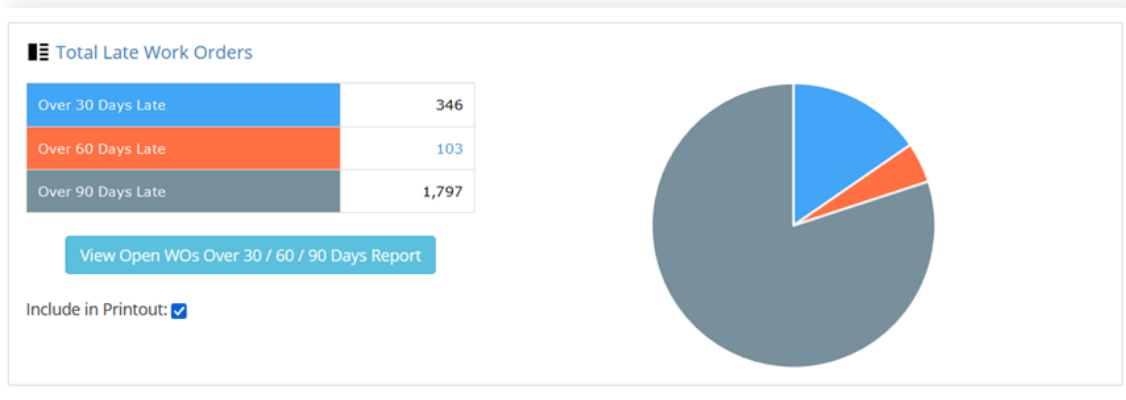
3.5.24 Describe any capability within the Solution to support site modification requests and differentiate them from standard work orders (Ex: Adding an additional wall which may require an architect, permitting, etc.).

Our project tracking and management is unusually robust thanks to our M&O Directors who

steer the program. Our work orders have the ability to be toggled as "Project '' work orders which activate a parent-child relationship for reporting, passing of work orders between trades, and also has a built in Gantt Chart feature for this very purpose.
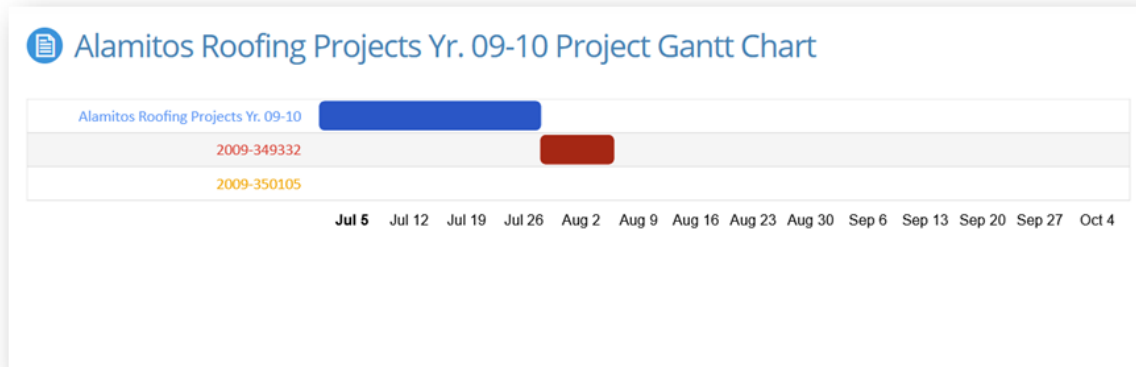
3.5.24.1 Describe how site modifications are routed and classified separately than work orders to avoid creating a backlog in work orders (is a separate system used to track them? Are requests classified separately?).

Purpose and status simplify even the most technical processes. We use the work order purpose to trigger if the work order should skip maintenance and route through Risk Management (e.g. HazMat), Business Services (budget approval), or any other department or person. The purpose drives the process, the Status is next and drives the flow through the process. So, a project work order would be submitted, the project purpose can be for a specific property or thing that causes it to route to an approver who can modify it which may trigger more approvals or at some point will be set to status that places it in the maintenance inbox for building of estimates,etc. There is an entire process and built in feature set to aid project management and building of estimates/scope for site funded projects.

3.5.24.2 Describe how the Solution categorizes site modifications for different resource elements and any limit to the number of elements (Ex: HVAC, school signs, intrusion systems, kilns, lockers, marquees, PA bell & systems, paint/stucco, exterior wood & doors, interior paint, partitions, playground equipment & turf, plumbing, fixtures, pool & pool facilities, relocatables & relocatable roofs, restroom partitions, roofs, scoreboards, shade structures, siding, tennis courts, theaters, windows, electrical, video cameras, etc.).

Site modifications and projects can be named within the system to create a parent-child relationship for reporting, as well as budget tracking. There are no limits to any items tracked within the system.

3.5.24.3 Describe different components that are part of a site modification request and how granular the initial requests can be. Including how the site modification request form is different from the work order request form.

Because of our design by M&O leadership, we designed the system to use the work order purpose to drive intelligence such as projects, site improvements, RRMA, and PM's. The components that achieve this process are that a work order has a "purpose", the purpose drives the unlimited approval flow using unlimited statuses, both the purpose and the status can drive email that solicit the required approvals. A typical site modification process might flow from the school principal to Business Services for budget assignment/approval, then Risk Management for any abatement review, then to a designated person in facilities for estimate development or project scheduling, if an estimate then the work order would be marked as an "estimate" so its cost would be omitted from various reports, and then routed to staff for completion or back to the site for final site approval of project.

3.5.24.4 Describe how site modifications are prioritized within the Solution (are they assigned a number?).

Site modifications are treated as work orders, but they have a toggle button to differentiate between a reactive (i.e. RRMA) work order, Preventive Maintenance work orders (we call PM's Recurring Work Orders), and Site Modification work orders (i.e. projects). The toggle activates additional fields (e.g. tasks, multiple locations, notes per task), necessary to properly manage a larger project. The status always drives the whereabouts of a work order in the process; the prioritization is a subset within the overarching workload, and is per person (or team).

3.5.24.5 Describe automated messaging functionalities within the Solution related to site modification requests (ie: If a work order is closed to create a separate site modification request/project or if a work order is re-classified as a site modification is a notice sent to the requestor?).

Approval request emails are triggered at each step, which can be unlimited. So, a site (e.g. school principal) will submit a work order for the purpose of "Site Modification", because of the purpose, our approval logic will trigger a approval request email to the person responsible for site modifications; when they approve it, the status changes which trigger automated email to whomever is responsible for the set status, which can be unlimited. So, the emails are triggered automatically whenever anyone hits an update/approve button, until no more triggers remain, which results in the work order being deposited in the final responsible person's inbox.
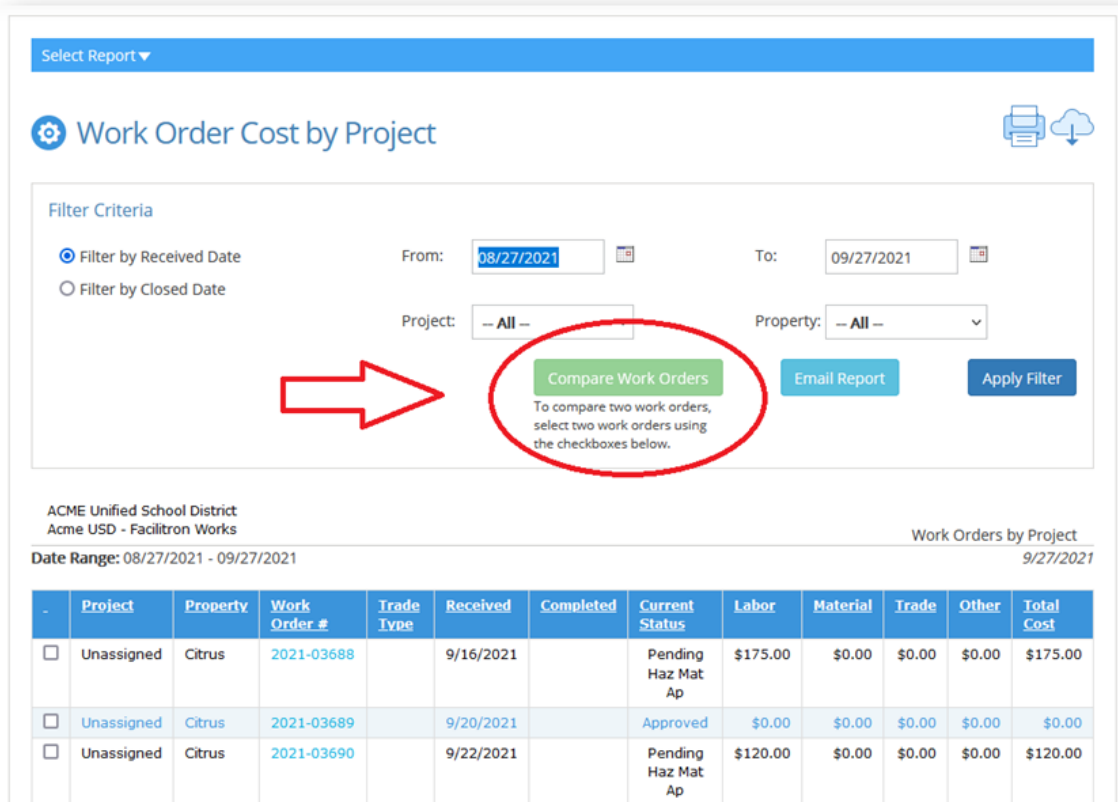
3.5.24.6 Describe the capability in the Solution to allot a certain amount of technician hours to a site modifications and tracking capabilities (Ex: a site requests a wall to be built and the technician is assigned to spend 16 hours on it, but actually spending 17 hours).

Facilitron Works is designed in a very advanced way to make managmening work flow and projects simpler. We have a comparison report to evaluate the original estimated cost i.e. an

"estimate" work order, against the "site improvement" work order. To the system, each is a work order, but for reporting, estimates are not counted in budgetary expenditures. The comparison report addresses the above need, but we have many many more features including Gantt Charts, an estimate creation and approval flow, HazMat approval, and designs that support approvals so that project managers can tie work orders together in a parent child relationship thus allowing for very advanced oversight of facility modifications. See next answer for a print screen of our project comparison report.

3.5.24.7 Describe any expense tracking capabilities within the Solution including comparing projected costs with actual costs.

Site modifications and projects are built into Facilitron Works. Below is a sample comparison report page that users export as support documents, billing, comparison, etc. Generally speaking, reports are focused toward a specific audience, the below are for comparison, but there are also budget, Gantt Charts, Work Order detail reports, to name a few that are for ease of identifying and managing costs.

Work Order Expense Compare

Select the estimate		Select the actual		Difference	
2020-03621	⌄	2020-03620	⌄		
Labor Cost:	$ 425.00	Labor Cost:	$ 380.00	Labor +/-:	$ -45.00
Material Cost:	$ 50.00	Material Cost:	$ 49.50	Material +/-:	$ -0.50
Trade Cost:	$ 0.00	Trade Cost:	$ 0.00	Trade +/-:	$ 0.00
Other Cost:	$ 50.00	Other Cost:	$ 27.50	Other +/-:	$ -22.50
Total Cost:	**$ 0.00**	**Total Cost:**	**$ 0.00**	**Total Over/Under:**	**$ 0.00**
				red indicates an overage	

3.5.24.8 Describe the ability within the Solution to track funding sources for site modifications.

Having numerous Department of Educations utilize Facilitron Works, tracking budget sources and the approval process are sewed into the program. We even support partial account allocation by percentages so project costs can be easily split.

Filter Criteria

Budget Name		For Property	— Do Not Filter by Property — ⌄
Account Number		Show Balance for Fiscal Year	FY 21-22 ⌄
For Fiscal Year	— All Account Numbers — ⌄		
Show Archive and Inactive	☐		

Apply Filter

Add New | Manage Beginning Balances | Export Budget List for Selected FY | Import Budgets

For Fiscal Year	Budget Name	Account No.	Property	Balance		Mult. Acct #s?	Archive	Inactive	Select
2020	2-Tom 3-12-	2-4500-2	Citrus	Beginning:	not set	Yes	☐	☐	Edit
				Expenditures:	-$0.00				Edit
				Balance:	n/a				Edit Acct #s
Any FY	3	453456236236545643 574357345724562345 62345234563465	Citrus	Beginning:	not set	No	☐	☐	Edit
				Expenditures:	-$0.00				
				Balance:	n/a				
Any FY	444444	444444	Citrus	Beginning:	not set	No	☐	☐	Edit
				Expenditures:	-$0.00				
				Balance:	n/a				
Any FY	4500-939-450-001		Citrus	Beginning:	not set	No	☐	☐	Edit

162

3.5.24.9 Describe how the Solution tracks site modification projected completion dates and actual completion dates.

Projects use a parent-child relationship where there is a Master "parent" work order which houses the overarching details, and with a click of a button a related-child work order is created to then track the subsets of the main work order. So, the parent has the general info, the child work order has the worker specific items (e.g. the framer installs the walls and when done clicks a button to then create a related but new child work order for the electrician to rough-in the electrical, and so forth. The Gantt Chart monitors the sequencing of Work Orders, and well as the dates for both requested and scheduled.
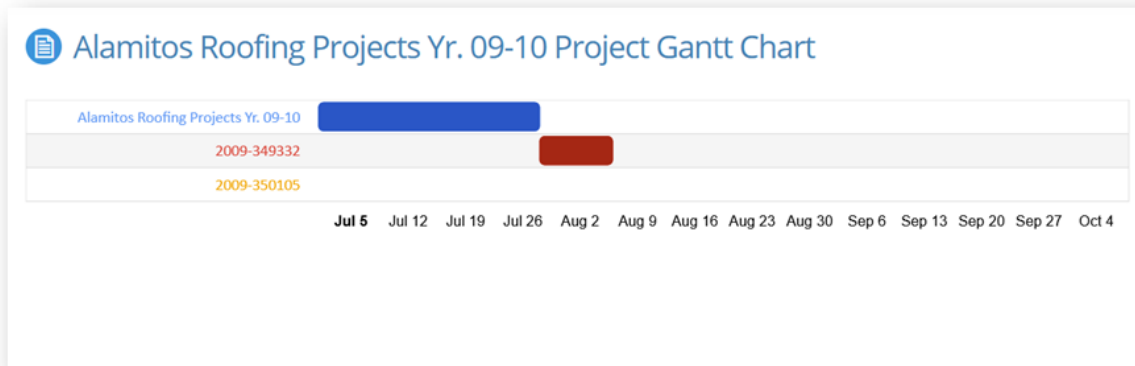
3.5.24.10 Describe reporting capabilities related to reports excluding site modifications (work orders only) and reports excluding work orders (site modifications only). Please also specify if site modifications are excluded from automated notices for overdue work orders.

Facilitron Works has a built report generator; but we've added the availability to schedule a report to be emailed to you on a schedule just like a recurring appointment on Outlook. Our report generator accesses all of the dataset so you can create a filtered report of just the data points you want. In addition to our report generators (we have 2; one is focused on work orders themselves, the other is "cost' related and is layed out to focus on budgets. That said, in addition to our report generator, the actual bulk of our reports were created by our partners. They drew up samples of the report they wanted for us, and we reverse engineered them. This resulted in dozens and dozens of canned reports that are top-level; and very advanced to support M&O management.

Custom Report Generator

Filter Criteria

○ Filter by Date Created
○ Filter by Date Closed

Report Period: Custom

From: 09/04/2021

To: 10/04/2021

Save Report | Load Saved Report | Schedule Report | Apply Filter

Location:

Action Taken:

Property Classification: -- All --

Property Group: -- All --

Property: -- All --
Adult School
Anahiem West
Bus 200
Citrus
Education Center

Purpose: -- All --
COVID-19
Equipt Repair
Fleet Vehicle Service
Grounds
HVAC Request

Project: -- All --

Trade: -- All --

Contractor: -- All --

Desc:

Reports To: -- All --

Worker: -- All --
-- Unassigned --
Cabral Roofing FN
Cleveland, Bradley
Draney, Carol
Fischer, Sam

Priority: -- All --

Crew: -- All --
Carpet Cleaning Crew
Custodial North
Custodial South
General Maintenance 2904
HVAC Crew 2903

Category: -- All --
Aerate Field
Ballast Humming
Bobcat
BRAKE
CABINET MAKING

Status: -- All --
Approved
Assigned to M&O
Budget Pre-Approval
Cancelled
Changed

3.5.24.11 Describe reports for site modifications available in the Solution (Ex: daily reports, weekly reports, reports by trade, reports by facility element categories, reports by site, reports by technician, expense/supply reports, chargeback reports, overdue work order reports, facilities use v. maintenance reports, etc.).

Since work orders can be marked as "site modifications", essentially all reports available to RRMA also apply to Projects, and more. With projects, we have an entire host of additional reporting; such comparison reports, budgetary, details, exporting, Gantt Charts, a Scheduler feature to assign them to specific workers on a specific date, as well as automation to track any stagnate work orders or statuses that are being tracked. Our unique "Schedule Report" feature

will automatically email a recipient a report on a schedule so they don't even have to sign onto the system during the busy times (e.g. summer); and just use the pdf's emailed to the manager to keep abreast of activity (i.e. have a open projects report emailed on Monday and a closed work order report emailed to the on Friday).

3.5.24.12 Provide sample reports for site modifications available in the Solution.

Site modification reports include comparison reports, Work Orders by Project, several budget related details, and of course the various search screens, exporting, and Report Generators filters all have project choices to filter. This ensures your favorite report can likely also include project and site modification projects.

ACME Unified School District
Acme USD - Facilitron Works

Work Orders by Project

Date Range: 08/27/2000 - 09/27/2021

9/27/2021

Project	Property	Work Order #	Trade Type	Received	Completed	Current Status	Labor	Material	Trade	Other
Mikes Project	Citrus	FY18-19-03231	Electrician	4/12/2019	11/13/2019	Closed/Completed	$0.00	$0.00	$0.00	$0.00
Mikes Project	Citrus	2020-03534	General Maintenance	6/4/2020		Received	$0.00	$0.00	$0.00	$0.00
Mikes Project	Citrus	2020-03536	General Maintenance	6/5/2020		Received	$0.00	$0.00	$0.00	$0.00
Mikes Project	Citrus	FY16-17-02963		4/13/2017	5/1/2017	Closed/Completed	$91.88	$50.00	$395.00	$45.00
Mikes Project	Citrus	FY16-17-02967		4/24/2017		Received	$0.00	$0.00	$0.00	$0.00
Mikes Project	Citrus	FY16-17-02968		4/24/2017		Received	$0.00	$0.00	$0.00	$0.00
: (6 work orders)							$91.88	$50.00	$395.00	$45.00

3.5.25 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

Warehousing/toolroom/& asset tracking wasn't heavily covered in the questions; but Facilitron Works' core system features those too. Our Toolroom design incorporates basic inventory functions and allows for the workers to "request" materials via the work order system which streamlines the process (i.e. for the toolroom attendant, the system generates email alerts to advise them that someone has requested materials, the materials show on a pick list for the attendants convenience, then the attendant can checkoff the item(s) listed which trigger an email to the worker advising them that the material are ready for pick up. Additionally, we have a robust Asset Tracking system built in which allows you (using a mobile device or tablet) to conduct an asset inventory using the assets serial number barcode to track its whereabouts. Simply by scanning the barcode that represents the classroom (or space(s), the assets location

is automatically updated to re barcodes). The asset tracking feature uses the phone/tablets bluetooth to sync with a barcode reader that allows the barcode to be read into the software from any portable device.

3.6 Integrated Resource Management

Facilitron is built following RESTful/API concepts which allow it to be open to both external API calls and batch processing via web services. In regards to integrating with other systems, we would first need to understand the nature and structure of the data that needs to be integrated as well as the abilities of these systems to ingest or expose the necessary data. Currently the Facilitron platform has integrated with external systems via multiple methods (e.g.: direct web services API calls between applications utilizing shared keys, shared cloud based repositories, etc.)					
	Yes	No	P	C	Comments
**3.6.1 Confirm that the Solution can be integrated to provide single sign on capabilities. **	X				
3.6.2 Confirm that the Solution can be integrated with identity systems or human resources systems to automatically determine different role-based permissions.		X			Not currently, but open to discussion; Roles must be configured during implementation
3.6.3 Confirm that the Solution can be integrated with Student Information Systems ("SIS") for the purposes of integrating with enrollment and scheduling data related to room use.		X			Not currently, but open to discussion
3.6.4 Confirm that the Solution can be integrated with email/calendar providers (such as Outlook).	X				
3.6.5 Confirm that the Solution can be integrated with Human Resource/Directory systems.		X			Not currently, but open to discussion
3.6.6 Confirm that the Solution can be integrated with facilities management and maintenance systems (if it does not provide facilities system capabilities within the Solution).	X				Facilitron is a fully integrated facilities management and maintenance systems
3.6.7 Confirm that the Solution can be integrated with Help Desk/Work Order systems (if it does not provide a help desk/work order system capabilities within the Solution).	X				
3.6.8 Confirm that the Solution can be integrated with		X			Not currently, but open to discussion

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Substitute systems to determine potential substitute teacher shortages.					
3.6.9 Confirm that the Solution can be integrated with RSS feed/Website Calendar systems.	X				
3.6.10 Confirm that the Solution can be integrated with displays, digital signage, and websites.	X				
3.6.11 Confirm that the Solution can be integrated with Video Conferencing providers (such as Zoom and Google Meet) to automatically set up virtual meetings and send invites to invitees.	X				
3.6.12 Confirm that the Solution can be integrated with Financial systems/Invoicing software to send invoices directly to requestors for costs associated with reservations.	X				
3.6.13 Confirm that the Solution can be integrated with Payment processors/credit card payment processors to process payments from requestors for costs associated with reservations.	X				

3.6.14 Describe key points of integration of proposed components/modules of the system. For example, how does planned maintenance detailed in the work order system affect reservations in the internal and external reservations system? Alternatively, describe how the system allows for integration with third-party systems to allow for tight coordination in managing facilities maintenance and use.

Facilitron has a fully integrated scheduling and reservation and work order system. The systems work together to generate work orders from the reservation system automatically. Most commonly, these work orders are to open/close the facilities, we have building automation too which turns on/off the HVAC systems. In addition to automatic rule based work orders, from the reservation system a District user can create a work order on the fly too. This integration includes Block Out of the campus(es), block outs of fields (think summer refurbishments), and can do some basic EMS functions too (i.e. turn off the HVAC at 4pm each day). Automation is handled through API's, which we build regularly to help clients with BAS, inventory, and accounting.

The Maintenance Management system seamlessly integrates with the Scheduling & Reservations system to give M&O visibility into all on-campus events—for scheduling maintenance projects, or coordinating lights, HVAC or setups at scheduled events. Facility administrators can create "Reservation Work Orders" without switching systems, or work orders can be configured to initiate automatically when events are scheduled and approved. Reservation Work Orders remain connected to the event in the system, so that if the event is

changed or cancelled, the work order is automatically updated.

3.6.15 Describe functionality available due to email/calendar integrations.

Facilitron creates custom iCal links for each reservation that can be subscribed to to auto-populate web calendars such as Google, Apple or Outlook. These links can be shared with external groups or used to populate district or school calendars. Using the Calendar Management tool in the platform, custom calendars can be created and subscribed to based on specific criteria (such as time of day, day of the week, facility, specific reservations, etc.) allowing the district to create calendars like after school events, high school athletics, after-school enrichment programs, etc.

3.6.16   Describe any additional related programs or modules Vendor offers that are not specifically called for in the previous sections of this RFP (e.g., transportation management, enrollment projections, or other tools/features).

Facilitron is currently Beta testing our Building Automation System (BAS) with several key partners and plans to roll out the fully integrated system in 2022. Using Building Automation, approved calendar events can automatically schedule any BACnet controlled system to turn on and off based on rules setup in the Facilitron platform during implementation. This allows equipment to come on at prescribed times before and after events depending on any number of variables and preferences.

With real-time activations, events added (approved) or removed (cancelled) from the scheduling platform will immediately activate or deactivate system protocols. This can reduce the frequency of unnecessarily heating and cooling buildings when events are cancelled and solves the problem of receiving last-minute requests to activate HVAC systems when events are scheduled on short notice.

With an overview of facilities mapped to certain systems as well as access to event schedules, administrators can coordinate and consolidate events into buildings or zones where fewer expensive activations are required, proactively managing systems and energy use—a powerful tool in today's era of shrinking budgets.

3.6.17   Confirm whether any of the core proposed products or additional offerings from Vendor may contain identifiable student information (e.g., student ID, name, address).

Facilitron does not track or store any student information within the system. All access to the system is password protected and encrypted utilizing a secure socket layer with session timers to log out inattentive users.

3.6.18 If the core proposed products or additional offerings may contain student data, confirm Vendor agrees to execute and abide by all terms in the Standard Student Data Privacy Agreement CA-NDPA (CA-NDPA) (included in Appendix E of this RFP).	
Facilitron agrees to abide by all terms in the Standard Student Data Privacy Agreement; currently Facilitron does not store any student information within the system.	

Part 4 Price

	Yes	No	Comments
4.1 Confirm that all costs, including, but not limited to, implementation, software licensing and maintenance, training, ongoing support, recommended professional services, taxes and surcharges, and costs of optional services and products and any other anticipated costs to the Participant have been included on the completed Appendix C: Pricing Form. **	X		
4.2 Confirm that should the Solution be down or performance degraded to render the Solution unusable for longer than 30 minutes (outside of a scheduled maintenance window), Vendor shall refund the portion of the contract equivalent to that outage window.	X		
4.3 Confirm that the Pricing Form includes an itemized schedule of all equipment and software for the proposed Solution and all pricing quoted includes all activities necessary for a complete, turn-key system.**	X		

4.4 Describe any assumptions made impacting the cost proposal, and any limitations (e.g., professional service hours, number of initial distribution groups) that apply to the listed costs. **
Facilitron charges a flat 14% service fee for use of the entire Facilitron platform: Scheduling & Reservation, Works and Attendee Management. This service fee includes turn-key implementation, a dedicated account management team for the district, 24/7 customer support for district community renters, unlimited training, quarterly business reviews (QBRs) with executive leadership and an annual operational cost analysis.

4.5 Provide a narrative explanation of the pricing proposal. Describe in detail any limitations of (e.g., length of term, service quantities) that apply to the proposed pricing. Note, limitations or terms that are unfavorable may be cause for rejection of the Proposal. **

Facilitron charges a flat 14% service fee for use of the entire Facilitron platform. This service fee includes turn-key implementation, a dedicated account management team for the district, 24/7 customer support for district community renters, unlimited training, quarterly business reviews (QBRs) with executive leadership and an annual operational cost analysis.

Facilitron's service fee is applied to external reservation requests with a dollar amount greater than $0. All internal requests with no fees, use of Attendee Management and the work order system, and round the clock support are all provided at no additional cost to the district.

4.6 If the Solution includes features to support fee-based external reservation of resources (as listed in section 3.3), confirm whether any transaction fees are charged for those reservations (e.g., does Vendor collect a percentage or flat fee for each paid reservation). If yes, please continue answering 4.6.1 - 4.6.5. If no, you may skip to criteria 4.7.

Facilitron charges a flat 14% service fee on external reservations.

4.6.1 Define how the Vendor's transaction fee is calculated (e.g., 1% of the total amount paid by the third-party reserving the facility).

Facilitron's service fee is 14% of the total dollar amount for the reservation. This service fee can be passed off to the end user, absorbed by the district, or split between the two (renter pays 7%, district pays 7%).

4.6.2 Confirm whether the transaction fee adjusts based on total revenue or number of external room reservations.

The service fee is based on the total revenue.

4.6.3 Describe whether the transaction fee is in addition to licensing fees outlined in the proposal or partially or fully offsets the licensing and other fees outlined in the proposal.

There is only a transaction fee; no additional licensing, setup or training fees.

4.6.4 Confirm that Vendor understands that the Ed Tech JPA Administrative fee applies to all revenue Vendor receives from a Participant (transaction fees as well as traditional licensing, maintenance and professional services charges).

Facilitron understands and acknowledges the JPA administrative fee.

4.6.5 Describe when and how transaction fees would be collected from Participant.
Facilitron handles all payment collections on behalf of the district and will remit payment back to the district on a monthly basis minus the 14% service fee.

4.6 Ed Tech JPA reserves the right to award to multiple Vendors a Master Agreement to best meet the needs of its Associate Members. If pricing is contingent upon a specific volume of students or staff, explicitly state those conditions. **
Facilitron pricing is not specific to volume and is a flat percentage.

4.7 Describe how growth and site changes will impact the price.
Facilitron pricing is not specific to volume and is a flat percentage. Growth or number of sites does not alter or impact the pricing model.

4.8 Describe how declining enrollment and site changes will impact the price.
Facilitron is not based on enrollment and therefore will not be adjusted or affected by changes to enrollment.

4.9 The maintenance and licensing fee shall not begin until the Solution has been tested and accepted by the Participant. Describe payment milestones and expectations. **
Payment shall begin upon the first month on the platform going live to the community where Facilitron is collecting external reservation fees. The district may begin using the platform internally at no cost.

Part 5 Exceptions

Describe any exceptions to the RFP content, general expectations, specific requirements, and/or the Ed Tech JPA's standard Master Agreement and Purchase Agreement. For each exception, propose acceptable alternative language and/or provide rationale to support the exception.
Facilitron has no exceptions.