



# System Implementation Partner - Request for Proposal

CONFIDENTIAL

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### **Statement of Confidentiality and Non-Disclosure**

The contents of this Request for Proposal (RFP) are Confidential Information, as defined in the Appendix A, Request for Proposal (RFP) Terms and the Confidentiality and Non-Disclosure Agreement signed by and between Kastle and the Vendor (“Vendors”). Vendors may disclose information obtained from or contained in this document on a “need-to-know” basis, to the employees, officers and directors of the Vendor or the Vendor’s affiliates.

This document may not be photocopied, reproduced or distributed to others at any time without the prior written consent of Kastle. Upon request, the Vendor will promptly return all materials received from Kastle without retaining any copies thereof.

The sole purpose of this document is to assist the Vendor in preparing a formal proposal for Kastle. This document does not purport to be all-inclusive. In furnishing this document, Kastle does not undertake any obligation to provide the Vendor with access to any additional information. No Vendor may treat this RFP as constituting an offer to enter into any business relationship or arrangement with the Vendors and Kastle. Further, Kastle retains the right to terminate the process set forth herein at any time.

If you are not the intended recipient of this document, please do not read, copy, use, or disclose it to others. Please return the document to and notify the sender of the delivery error immediately.

## **1. Kastle Background**

Kastle Systems is a privately held leader in managed security and property-technology services, not an outsourced sales firm. Gene Samburg founded the company in 1972 in Falls Church, Virginia, after Washington-D.C. building owners asked for a way to outsource the management and maintenance of complex security systems. Over more than five decades, Kastle pioneered remote access control and “security-as-a-service” by designing, installing, monitoring and maintaining integrated security solutions for clients across the United States and Australia. Its cloud-based platform protects more than 3,600 properties and 41,000 businesses, and the company manages security systems for over 10 000 locations around-the-clock. Kastle employs over 500 people across 11 core locations—including Washington, D.C., New York, Los Angeles, San Francisco, Chicago, Houston, Dallas, Miami, Philadelphia, Atlanta and Sydney—and operates four geo-dispersed monitoring centers to provide 24/7 support. Headquartered in Falls Church, it is recognized as the largest security company in the D.C. region.

By combining cutting-edge technology with managed services, Kastle helps building owners and businesses enhance security, reduce operational costs and scale efficiently.

## **2. Purpose of Request for Proposal (“RFP”)**

Your company is invited to submit a proposal to Kastle to serve as a system integrator. Your proposal should outline your firm’s services and expertise necessary for successfully implementing an enterprise resource planning (ERP). The purpose of this RFP is to identify an implementation partner with an understanding of the healthcare industry and experience working with companies like Kastle that ultimately represent the best value to the company.

## **3. RFP Conditions**

Submission of a proposal in response to this RFP does not commit Kastle to pay any costs incurred in proposal preparation or submission. Kastle may reject any or all vendor proposals at their sole discretion and may elect to terminate this selection process at any time.

Kastle may, during the RFP period, advise the vendors in writing of any changes to the RFP. All such changes shall become part of the RFP as if originally included therein.

## **4. Project Scope**

As Kastle has completed a rigorous ERP evaluation, it is embarking on a large-scale system modernization transformation. The Company is requesting proposals from system integrators that best meet Kastle’s business and technical needs. The major objective of the selection process is to select a partner to lead the technical aspects of implementation of the solution.

### ***Scope of Software and Services***

The Vendor’s proposed methodology should include the following components with: (1) one-time and (2) annual ongoing costs associated to each individual component:

- a) **Implementation Fees:** design, build, and subsequent testing of the solution
- b) **Integration Fees:** design, build, testing and deployment of the integration solution
- c) **Ongoing Training:** Provide samples of ERP training materials and any costs associated with the use of these materials.

- d) **Transaction Data Conversion:** Vendor should be prepared to convert a defined subset of system data to the proposed technology as defined by Kastle.
- e) **Travel and Expenses:** All reasonable and necessary travel and expenses typically incurred in the execution of the services in scope should be included in the costs as a separate item (if and when applicable).
- f) **Post Implementation Applications Managed Services Fees:** Installation and maintenance of the platform solution and its technology stacks, change control management, ongoing applications and technology patching, release upgrades, applications administration and services reports.
- g) **Software Maintenance Fees:** Describe the maintenance agreements and periodic maintenance fees (ongoing cost per year) including all on-going license fees associated with additional applications/technology stacks for the solution.
- h) **Ongoing Training Fees:** Estimated additional training cost for online, webinar or in-person programs to train new users or to equip all users with new skills on the system's future releases/functionality. Please indicate the pricing model, e.g., fees per user or fees for the cost of materials and describe the availability of training including on-line training, off-site classroom training and on-site classroom training for business and technical users.
- i) **Other Costs:** Additional costs for customization, migration of historical and current data to the new system, storage and back-up, other network infrastructure.

## 5. Anticipated Timeline

Activity	Timeline
Anticipated RFP Date of Issue	1/26/2026
RFP Q&A Sessions	1/26 – 1/30/2026
Discovery Sessions	2/2 – 2/6/2026
RFP Due Date	2/10 @5PM EST
Short List Proposal Presentations	2/11 – 2/13/2026
Projected Notification	2/20/2026
Anticipated ERP Project Kick-off	Q2 2026

## 6. Points of Contact

Thomas Brake

Email: thomas.brake@highspring.com

Roni Magendzo

Email: roni.magendzo@highspring.com

## 7. Kastle's Business Model

Kastle delivers fully managed security solutions for office buildings, tenants, multifamily communities, and construction sites. Its technology-enabled services integrate access control, video surveillance, and visitor management to provide a seamless and comprehensive security experience.

### Core Capabilities

- **Managed access control:** Kastle pioneered remote access control and delivers comprehensive access-control services, including mobile credentials that let authorized users open doors with a smartphone, as well as cloud-based management and open-architecture integration. The company designs, installs and manages systems tailored to each property and provides ongoing administration and software updates so clients do not need their own security staff.
- **Video surveillance and analytics:** Through services like KastleVideo and CheckVideo, the company deploys high-definition cameras, cloud-enabled network recording and AI-driven analytics that monitor facilities remotely and alert clients to incidents. Video monitoring can be integrated with access control and other building systems.
- **Fire and life safety and environmental monitoring:** The company offers managed fire-alarm and life-safety monitoring, environmental control and alarm services that are tied into its central monitoring centers.
- **Business intelligence and analytics:** Kastle Insights and EverPresence harness IoT sensors to provide real-time occupancy data and business analytics that help clients optimize building operations while maintaining security.
- **Industry expertise and vertical solutions:** Kastle serves more than 40,000 organizations, primarily commercial real-estate owners, tenant offices, multifamily properties, enterprise businesses, government and education facilities, and its average client stays with the company for more than a decade. The company offers specialized solutions for commercial real estate, enterprise offices, multifamily housing, construction sites, law firms, education, scrap & recycling, government and city surveillance.

## 8. Major Functional Areas in Scope

The table below depicts the major business functions in scope and expected to be supported by an ERP. Business requirements will be provided in the final document released per the schedule in Section 5.

### 8.1. ERP Business Functions in Scope

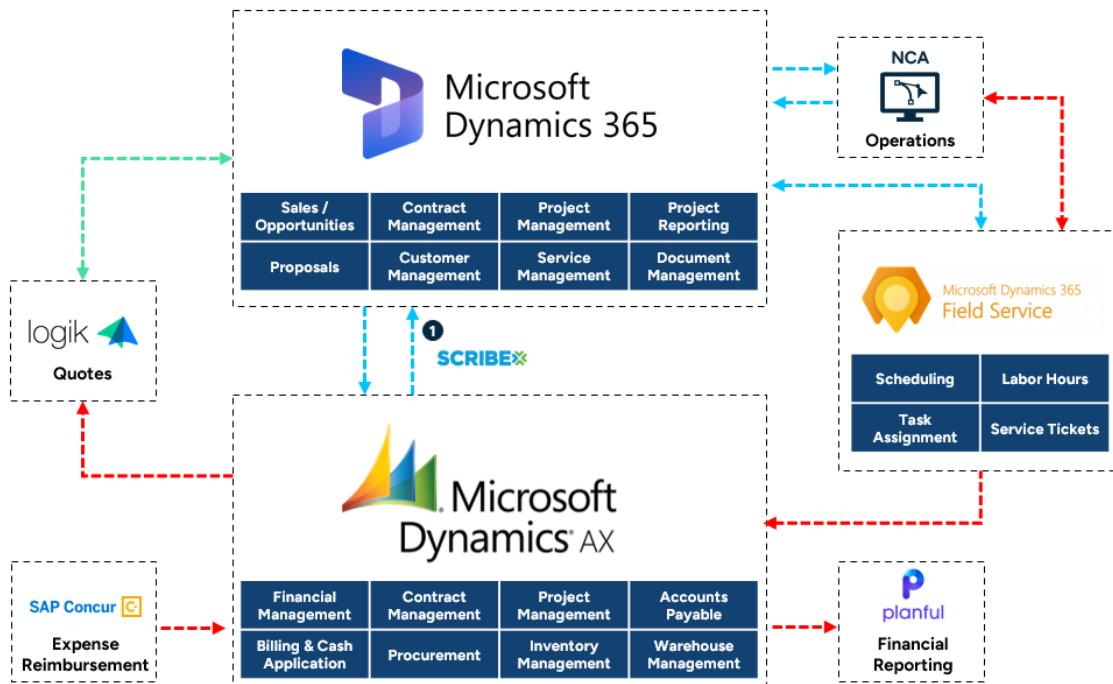
- General Accounting
  - General Ledger Accounting
  - Entity Management
  - Monthly / Quarterly Close
  - Fixed Asset & Inventory Accounting
  - Accounting Policy
  - Bank Reconciliations
- Business Decision Support
  - Budgeting & Financial Planning
  - Financial Reporting & Analysis
  - Performance Measurement
  - Forecasting

- Lead to Cash (potential-pending solution CRM capabilities)
  - Contract Management
  - Building and tenant management
  - Customer Account Management
  - Dynamic Billing
  - Project Cost Management
  - AR / Accounting Maintenance & Reporting
  - Payments & Cash Application
- Project Management
  - Project Planning & Budgeting
  - Project Scheduling
  - Project Inventory
  - Time Entry & Labor Tracking (Subcontractor & Internal Resources)
  - AIA Billing
  - Expense Management (Labor & Materials)
  - Project Billing & Revenue Recognition (Percent Complete)
- Service
  - Subscription Management – Renewals, Termination, Escalations
  - Service Tickets / Order Processing
  - Scheduling & Dispatch
  - Recurring Billing
  - Recurring Monthly Revenue Roll Forward Reporting
  - Customer Asset & Equipment Management
- Procure to Pay
  - Manage Vendors / Vendor Catalog
  - Purchasing / Procurement
  - Accounts Payable
- Inventory Management
  - Inventory Planning
  - Requisition Materials
  - Kitting
  - Receive Materials & Services
- Warehouse Management
  - Site, Location, Van, and level Bin Tracking
  - Internal Warehouse Transfers

## 8.2. Current State ERP Environment and Anticipated Scope of ERP Requirements

Current Application	System Functionality	Overall Description	In Scope for Replacement?	Integration
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Microsoft Dynamics AX	General Accounting, Business Decisions Support, O2C	ERP System	Yes	N/A
Microsoft Dynamics CRM	Billing, customer record information, Revenue data origination	CRM System	No	Yes
Concur	Corporate Card and Reimbursable Expense Management System	Expense Management System	No	Yes
Dayforce	HR Operations, Payroll Processing, e-verification of i9 information	HCM System	No	Yes
Logik	Product Pricing & Quotation Management System	CPQ	No	No
Dynamics Field Service	Field services system used for managing installations	Field Service System	Yes	N/A
Planful	Planning and Budgeting system	CPM System	No	Yes
NCA	Manages customer sites, buildings, and asset configuration / activation	Operation System	No	Yes



## 9. End-user License Population

Current Application	Type of License	# Users
MS AX	Full License + Admin	75 to 100 full + 75 partial /TBD
Concur	Exp report + admin	750 employees, billed for 200 report submissions/month
UKG	Regular Employee Access + admins	Small number/HR admins, all employees can access UKG website
MS CRM	Regular Users + Admin	Sales Enterprise - 110 Customer Service Enterprise - 300
MS Field Service	Regular Users + Admin	190
CPQ	Regular Users + Admin	230
Planful	Regular Users + Admin	Small number/finance team

## 10. General RFP Procedures

### 10.1. Acknowledgment of RFP Receipt

Within one business day of receipt of this RFP, Vendor must provide acknowledgment of receipt via electronic mail (e-mail) to the contact(s) specified in Section 6. Acknowledgment should include confirmation of receipt. **Vendor's intent to respond to the RFP should be received no later than January 30<sup>th</sup>, 2026.**

### 10.2. Discovery Sessions

Vendor Discovery sessions should be scheduled by submitting your preferred Vendor Discovery date to the contacts identified in Section 6. You must receive email confirmation from the contacts identified in Section 6 to secure a day, time, and logistics for the Vendor presentation. **Kastle anticipates scheduling Vendor Discovery Sessions from February 2<sup>nd</sup> to 6<sup>th</sup>.** Each vendor will have 90 minutes for Q/A. During the session, the selection team will be engaged remotely. **Additionally, optional, 45-minute discovery sessions will be established between January 26<sup>th</sup> to 30<sup>th</sup>.**

### 10.3. Vendor Presentation

Vendor presentation sessions should be scheduled by submitting your preferred Vendor Presentation date to the contacts identified in Section 6. You must receive email confirmation from the contacts identified in Section 6 to secure a day, time, and logistics for the Vendor presentation. **Kastle anticipates scheduling Vendor presentations from February 11<sup>th</sup> to 13<sup>th</sup>.** During this session, the selection team will be engaged remotely.

### 10.4. Proposal Preparation, Format, and Submission Guidelines

All responses to this RFP must be in English with currency in USD. All efforts should be made to ensure proposals are clear and concise. Bindings, displays, and promotional material are neither required nor desired unless they add substance to the proposal. Vendors must submit their proposal in accordance with the Proposal Submission Instructions, using the same headings and categories contained in this RFP, to ensure a fair, equitable, and timely evaluation. In addition, submissions that include alternative proposals or deviations, clarifications and/or exemptions must be clearly identified and listed separately as an attachment, as alternative items for Kastle consideration.

Vendors must provide an electronic copy of the proposal, via electronic mail (e-mail). All electronic documentation shall be in Microsoft office programs (Word, Excel, PowerPoint) or PDF files and must be sent to the contacts identified in Section 6.

**Kastle must receive your complete proposal by 5:00 P.M. Eastern on February 10<sup>th</sup>.**

Proposals may be rejected at the discretion of Kastle if they are incomplete or received later than the due date. Proposals should describe the most favorable terms and shall remain active for six (6) months from the proposal due date. All proposals, and materials submitted in conjunction with the proposals, shall become the property of Kastle; respecting agreed to confidentiality, and will not be returned.

**10.5. Confidentiality**

Vendors will regard and preserve as confidential all information obtained from any source as a result of this RFP. All information exchanged is for proposal purposes only and is not to be disclosed to other parties or used for any other purpose.

When submitting confidential material to Kastle, the Vendor must clearly mark it as such. Information received in response to this RFP will be held in strict confidence and will not be disclosed to any party other than Kastle and the parties listed in Section 6 without Vendor's express written consent.

**10.6. Accuracy of RFP**

This RFP and other bid documents furnished by Kastle may include errors, omissions, or deficiencies, and the accuracy and completeness of such documents is not guaranteed. In the event such errors, omissions, or deficiencies are discovered by Vendor, it shall promptly notify Kastle in writing, but in no event later than 48 hours after discovery.

**10.7. Terms of Responding / Binding Proposal Acknowledgment**

A duly authorized officer of Vendor's company must sign Vendor's proposal and the completed proposal shall be without inter-lineation, alterations, or erasures. It will be assumed that all representations made in the proposal will be binding, and that Vendor's organization has agreed to all the requirements of the RFP unless specifically stated otherwise.

**10.8. Disclaimers**

Vendor is hereby advised that Kastle is not committed to any course of action as a result of its issuance of this RFP and/or its receipt of a proposal from Vendor or other firms submitting a proposed solution. In particular, Vendor should note that Kastle may:

- Accept or reject all or part of a proposal
- Reject any proposal which does not conform to instructions and specifications
- Not accept proposals after the stated submission deadline
- Not accept the lowest priced proposal
- Reject all proposals, if it so decides
- Negotiate with one or more firms
- Award a contract in connection with this RFP

- Make no award of a contract
- Negotiate further terms and other conditions of business with the successful Vendor(s)
- Contact any Vendor to obtain corrections or clarifications to a submitted proposal, if necessary, to make a fair comparison of all proposals submitted
- Extend the proposal submission date for all Vendors, if it is determined to be necessary for any reason
- Amend or supplement this RFP in writing at any time
- Withhold information pertaining to the final selection process

#### 10.9. [Evaluation Criteria](#)

Kastle will evaluate Vendor's proposal in a fair, consistent, and objective manner. Responses to questions or requirements identified in this RFP will form the basis of Kastle's evaluation. A final decision regarding the solution and a contract award will be subject to the following key decision criteria:

- Vendor's overall capabilities: viability, implementation (approach, methodology, timeline and resources), references, and customer support model.
- Cost effectiveness of the proposed approach

The vendor shall inform Kastle of its decision to be removed from consideration upon making this decision. In submitting a proposal, vendor waives any right to claim damages of any nature based on the selection process, final selection, and any communications associated with the selection.

#### 10.10. [Review Rights](#)

Proposals submitted may be reviewed and evaluated by any person(s) at the discretion of Kastle, including employees or contract workers within Kastle, and any third party or independent consultants retained by Kastle now or in the future.

#### 10.11. [Contract Award](#)

Kastle will confirm its selection either via electronic mail (e-mail) or in an individual notification conference call to each vendor participating in this RFP.

Non-acceptance of a proposal does not imply criticism of the proposal and/or any implication that the proposal was deficient. Non-acceptance of a proposal means only that another solution was deemed by Kastle to be a better fit, or Kastle has rejected all proposals. In keeping with Kastle's total cost of ownership approach, Kastle is not obligated to accept the proposal offering the lowest cost of services.

#### 10.12. [Conflict of Interest](#)

Vendor shall disclose any actual or apparent conflict of interest that may exist between Vendor, any employee or owner, or any party that Vendor contemplates may provide services or materials to Kastle, if Vendor is selected. Vendor should also disclose any actual or apparent conflict of interest it may have with any party having an interest in Kastle.

#### **10.13. Supersede Agreement**

To the extent by which it may be applicable, by submitting a proposal in response to this RFP, Vendor hereby agrees to offer Kastle the option to terminate, without penalty, all or a portion of any existing agreements between Vendor and Kastle.

#### **10.14. Contract Terms**

If Kastle elects to acquire any or all of the items in Vendor's response, then Kastle will enter into contractual negotiations with Vendor. The final agreement terms will be defined by a written agreement which will not be binding until fully executed by both parties. Any reliance on contract negotiations prior to a definitive agreement being signed by both parties shall be at Vendor's sole risk and expense.

### **11. Proposal Submission Instructions**

The following instructions will serve as the guide for organizing an appropriate response to this RFP; Vendor proposals should include the following chapters:

#### **11.1. Section 1 – Proposal Overview**

The proposal overview should include the following:

- An executive summary of the proposal, demonstrating the Vendor's understanding of this RFP. This should include a summary of Vendor's overall capabilities, description of the capabilities, proposed pricing and discount framework, estimated implementation timeline and resources.
- The name(s) of personnel authorized to represent the Vendor, and key Vendor personnel to be assigned to the platform.
- The Account Management structure with the key management resources and their resumes supporting this engagement.

#### **11.2. Section 2 – Vendor Detailed Questions**

The Vendor chapter should include the following:

- Answers to all questions outlined in Section 12 of this RFP
- Relevant diagrams and/or visual aids where applicable, particularly when responding to the system and hosting capabilities questions.

#### **11.3. Section 3 – Fee Structure**

Vendor should propose a fee structure that clearly delineates one-time set-up and annual ongoing costs associated to each individual component:

Please provide the attached pricing template with your RFP response:

- If a phased implementation is recommended, please break the fee estimates out by the proposed phasing
- If tiered pricing is applicable, please provide the basis for such pricing and identify those price components which are dependent on variable factors
- If alternative contracting vehicles are available for Kastle to consider, Vendors are encouraged to identify this in their proposals

- Price ranges are acceptable for line items which are dependent upon detailed specifications. However, Vendor should strive for as much specificity as possible
- Vendor's standard Master Service Agreement (MSA) and/or standard Service Level Agreement (SLA) should be included in this chapter
- Please be sure to include any key assumptions driving the proposed fee structure

#### 11.4. **Section 4 – References**

Provide a minimum of five (5) customer references, where your firm implemented a solution that included robust finance & HR functionality, with at least two in the healthcare industry. For each reference, please provide the following information:

Company Name	
Year Relationship Established	
Contact Name	
Title	
Address	
Email	
Phone	
Description of the Services Provided	

### 12. **Vendor Detailed Questions**

#### 12.1. **Company Background and Restrictions**

12.1.1. Vendor's name, corporate office address, web address, and contact information

- 12.1.2. Brief history of your company discussing growth, ownership (e.g., background and reputation of company principals), and development.
- 12.1.3. How many employees work for your company?
- 12.1.4. Vendor's W-9 form
- 12.1.5. Overview of your insurance coverage for applications, professional services, and hosting services.
- 12.1.6. Are there any current lawsuits or regulatory actions involving your organization? If yes, please explain.
- 12.1.7. Has your organization recently been acquired by any entity?
- 12.1.8. Please discuss any potential conflicts of interest that may exist if selected to provide the software and perform the services outlined in this RFP.
- 12.1.9. Please describe your strategy to incorporate innovative technology and better business practices into the solution and provide the supporting technology roadmap.

## 12.2. Estimated Implementation Effort

- 12.2.1. This section is intended to provide Kastle with an overview/estimate of implementation complexity and timing for your solution.
- 12.2.2. The approximate length of time it will take to satisfy the requirements as outlined in this RFP.
- 12.2.3. Key project milestones from project kick-off to go-live to postproduction support.
- 12.2.4. Overview of typical testing approach for this implementation including roles and responsibilities, physical locations, etc.
- 12.2.5. Overview of typical documentation and training approach.
- 12.2.6. Kastle will be providing Internal program / project management office and resources. Describe how your team will interface with the office and personnel.
- 12.2.7. Provide an organizational chart showing the structure and key Vendor personnel you propose will serve on the implementation project.
- 12.2.8. Identify the anticipated time and skill levels required of Kastle's resources in order to support the implementation.

### 12.2.9. Implementation Considerations

- a) Provide an overview of your standard implementation methodology, including specific implementation considerations and critical success factors for Kastle.
- b) Provide your thoughts regarding the appropriate implementation phases. For example, should the implementation be phased by business unit, Location(s)? by major function? "Big Bang" approach?
- c) What is your estimated implementation project duration, based on Kastle's size, complexity, requirements, etc.?
- d) Provide a typical implementation work plan with the following components to better understand your implementation approach:

- Tasks within a work breakdown structure
  - Resources (vendor and Kastle)
  - Estimated effort in hours
  - Estimated timeframes
- e) Provide a description of your recommended system testing activities such as functional testing, integration testing, parallel testing, user acceptance testing, etc.
- f) What tools/utilities are provided to support and expedite the initial system configuration activities specific to Kastle's industry?
- g) List any subcontractors or 3rd party software, customizations, modifications, or enhancements required (other than the core product) to support the scope of the project defined within the RFP / requirements content.
- h) Describe the level of process improvement and process re-engineering which is included within your implementation approach.

#### **12.2.10. Training Considerations**

- a) What is your suggested training approach for a project of this size and complexity?
- b) What is your standard training schedule available to all customers?
- c) Which resources from Kastle would you suggest being included in the training?
- d) Who conducts the application and application support training? (e.g., Vendor, VAR, dedicated training staff, implementation consultant, etc.)
- e) Who conducts the system administration/technical training? (e.g., Vendor, VAR, dedicated training staff, implementation consultant, etc.)
- f) Describe the training resources provided by your company to support the implementation process.

#### **12.2.11. Data Conversion Considerations**

- a) What is your overall approach to data conversion, including data validation/reconciliation?
- b) Do you provide/use automated tools for data conversion?
- c) What are the typical data areas you consider in using automated data conversion tools?
- d) Are the automated tools generally utilized by IT staff or Business staff in conducting the data conversions?
- e) What level of involvement is required by Kastle in the data conversion effort?
- f) Do you have standard data conversion tools/templates in your system from Kastle's existing platform(s)?

#### **12.2.12. What service and support offerings are included? Please describe any tiered support which may be available and indicate what level of support (including SLA's) is included within the costs provided in your RFP response.**

12.2.13. Do you offer a dedicated person that is responsible for the account? Is there ticket management integration within your product for the customer to log issues with the software during testing and during deployment?

12.2.14. Do you offer ongoing training for new Kastle employees or upgrades/modifications in the system? Is this provided by you or direct from the vendor?

12.2.15. Provide the total number of staff at your company dedicated in the following areas:

- Customer Service
- Implementation Services
- Research and Development
- Technical Support

12.2.16. Please provide a copy of your current standard consulting services agreement and rate structure proposed for Kastle. Please identify the discount percentage and amount you are providing.

12.2.17. Please provide your payment term options (payment at purchase, milestone payments, etc.) and discount structure for Kastle.

12.2.18. Environment Management

- a) Describe the software environments you recommend be made available as part of a standard installation (e.g. Production, Test, Development, etc.)
- b) Describe your approach to environment management - the refreshing of one environment to another (e.g. Production to Test)
- c) Describe if a customer is able to manage the timing of refreshing an environment (e.g. on demand, or upon a set schedule)

### 12.3. Other items

Answers to these questions should correspond with the pricing outlined in Section 11.3 (Section 3 – Fee Structure) of your proposal:

12.3.1. Provide an organizational chart showing the structure and key Vendor personnel you propose will serve the account. Please describe their specific role and responsibilities.

12.3.2. Describe how your company addresses quality issues and complaints.

### 12.4. Overview/Certifications

In this section, please outline the capabilities of your organization to support a ERP solution for Kastle. Answers to these questions should correlate with your response to Section 11.3 (Chapter 4 – Fee Structure):

12.4.1. Describe the minimum and recommended software and network/connectivity requirements needed for your team to connect to Kastle's software environments (development, test and production).

12.4.2. Please list any awards the company has received in the past three years and the year received.

12.4.3. Identify the number of employees by certifications that are full time employees.

- 12.4.4. Describe your training program for your consultants (e.g., required courses, hours expected per employee annually, etc.,).
- 12.4.5. Is your 24x7 support staffed by regionally based support teams in North America, South America, Western Europe, Eastern Europe, Middle East, APAC North, APAC South? Please describe your global support model in detail.
- 12.4.6. Do you assign by name all members of the team we will work with, or are reported issues handled by a resource pool? What is your policy on removing resources from the project either by request of the client or by your firm?
- 12.4.7. Can you describe the tenure and retention rates of employees?

#### 12.5. Help Desk/Support Model/SLA

In this section, please provide details on your current help desk and support model proposed for Kastle, and the ability to scale those operations as Kastle increases volume / users / interfaces:

- 12.5.1. Please describe the support model (dedicated, shared, etc.) proposed for Kastle and corresponding escalation procedures.
- 12.5.2. Identify what system administration functions and skill levels you would expect Kastle's IT (as opposed to Vendor's) to fulfill in supporting the system solution.
- 12.5.3. Mechanisms for engaging support model – (e.g., ticket system, phone, web, etc.,).
- 12.5.4. Hours of support model.
- 12.5.5. Location of support model staff (e.g., at hosting facilities).
- 12.5.6. Please describe the Service Level Agreement (SLA) you would expect to implement with Kastle, including system performance guarantees, availability percentage, and support levels/responses.
- 12.5.7. What growth do you anticipate the ERP solution can handle without further investment? Characterize the type of investment necessary (e.g., hardware only, application architecture, etc.) to scale a system for Kastle.
- 12.5.8. What is the current and future investment your company has within the construction & associated services industry? Please describe R&D investment, user groups, and other initiatives.

## **APPENDIX A – Request for Proposal (RFP) Terms and Conditions**

Vendor understands, acknowledges and agrees that it is submitting its proposal subject to the following conditions:

1. This RFP is not an offer to purchase any equipment or other goods, or any services.
2. Kastle will not incur or be liable for any costs associated with the preparation of Vendor's Proposal.
3. This RFP has been prepared by Kastle and is being furnished solely for use by prospective Vendors so that they might prepare a Proposal on the Project. The information contained in this RFP has been prepared to assist interested parties in making their own evaluation and does not purport to contain all the information that a Vendor may desire. Kastle makes no representation or warranty as to the accuracy or completeness of the information contained in this RFP. Kastle shall have no liability for any misrepresentations (express or implied) contained in this RFP, or any omissions from this RFP, or in or related to any other written or oral communications related to the RFP process. Nothing contained in this RFP can be relied upon as a promise or representation regarding future events or performance.
4. Kastle reserves the right, in its sole and absolute discretion, at any time, without notice to Vendor or any other party, to:
  - terminate or suspend the RFP, or the RFP process;
  - terminate Vendor's further participation in the RFP process;
  - accept or reject Vendor's Proposal;
  - enter into, terminate or suspend discussions or negotiations with Vendor, any other vendor or any other party or parties about the subjects covered by this RFP;
  - purchase or enter into agreements for the purchase of the materials, goods or services covered, in whole or in part, by this RFP, with any other vendor or party, whether or not such vendor or party participates in this RFP process.
5. All modifications to this RFP must be issued in writing and signed and dated by an authorized official of Kastle. Modifications of any nature, whether written or oral, by anyone else, or in any other manner, will have no effect on this RFP.
6. All of the terms and conditions set forth in Vendor's Proposal to this RFP are intended to be, and are, irrevocable and may be accepted by Kastle at any time within six months of the date of Vendor's proposal.
7. Vendor agrees to timely respond to any inquiries, for additional information or otherwise, by Kastle, and to prepare and provide, if requested, a presentation of Vendor's Proposal to Kastle.
8. The selection criteria, inquiries, questions or information put forth in this RFP are illustrative and meant to provide a basis for explanation only are not meant to provide either a determinative or conclusive basis for a decision by Kastle. Kastle may decide to use the selection criteria, inquiries, questions or other information alone or together with any other criteria it deems appropriate, or disregard them either in part or in whole, in evaluating proposals to this RFP.

Any decision by Kastle to accept or reject any vendor proposal, in whole or in part, is made by Kastle at its sole discretion.

Vendor understands that any commitment or agreement, which may or may not be awarded in response to this RFP, is in the sole discretion of Kastle; and that if any commitment or agreement is awarded Kastle may award it to that vendor or other third party whose proposal Kastle, in its sole discretion, deems the most advantageous to Kastle for any reason or reasons that Kastle deems appropriate. Cost and a host of other factors will be considered. Therefore, a commitment or agreement may not necessarily be awarded to the vendor or offeror proposing the lowest price.

9. Kastle will not be deemed to have accepted, in whole or in part, Vendor's Proposal, whether acceptable to Kastle or not, unless and until a definitive written agreement setting forth all necessary and proper terms and conditions for the provision of the materials and services described in the project are executed by Kastle and Vendor ("Agreement"). Nothing in this RFP or the RFP materials shall obligate Kastle to enter into an Agreement with Vendor, proceed with negotiations with Vendor, or procure services or materials from Vendor; and no such obligation shall be created, except by execution of the Agreement, and then only in accordance with the terms of the Agreement.
10. Kastle shall have the right to use all materials, plans, solutions, processes or deliverables, in whole or in part, submitted by Vendor in response to this RFP, even if Vendor is not selected by Kastle to provide the materials and services described in this Project. While utilizing vendors materials, Kastle will maintain confidentiality of said documents.
11. Kastle shall not, as a result of issuing this RFP or engaging in the RFP process, incur any liability or obligation whatsoever to Vendor, or any other party. The issuance of the RFP does not obligate Kastle to accept any vendor proposal to the RFP. If a vendor is selected during the RFP process and subsequent negotiations begin with that vendor, Kastle reserves the right, at its sole discretion, to enter into discussions or negotiations with any other vendor at any time.
12. The information contained in this RFP is confidential and proprietary to Kastle. No part of this RFP may be reproduced, in whole or in part, or made available, in any form, to any third party, without the express, prior, written permission of Kastle. All information contained in the RFP, or in subsequent written or verbal communications from Kastle to Vendor shall be considered confidential and may be used only in connection with the preparation of Vendor's Proposal. Vendor may not make any public announcement or release any information regarding this RFP without Kastle's prior written permission.