



**North Central Texas
Council of Governments**

TXShare
Your Public Sector Solutions Center

RESPONSE TO REQUEST FOR PROPOSALS (RFP): 2025-017
Enterprise Resource Planning (ERP) Consultancy Services
Response Due Date: February 26, 2025 (2:00 PM CT)

Attn: Craigan Johnson, Bid Contact
Phone: (817) 695-9186 | Email: cjohnson@nctcog.org
Purchasing Division, 616 Six Flags Drive, Arlington, TX 76011

RESPONSE SUBMITTED BY:



Kastech Solutions LLC
6918 Corporate Dr, Suite A1, Houston, TX 77036

Kastech Point of Contact Details:
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1 Certificate of Offeror and Statement of Understanding

1.1 Certificate of Offeror


<h1 style="margin: 0;">TXShare</h1> <p style="margin: 0;">Your Public Sector Solutions Center</p>		
<p style="margin: 0;">REQUEST FOR PROPOSALS</p> <p style="margin: 0;">For</p> <p style="margin: 0;">Enterprise Resource Planning (ERP) Consultancy Services</p> <p style="margin: 0;">RFP # 2025-017</p>		
<p style="margin: 0;">Sealed proposals will be accepted until 2:00 PM CT, Monday, February 5, 2025 and then publicly opened and read aloud thereafter.</p>		
<p style="margin: 0;">Kastech Solutions LLC</p> <hr style="border: 0; border-top: 1px solid black;"/> <p style="margin: 0;">Legal Name of Proposing Firm</p>		
<p style="margin: 0;">Suresh Katamreddy</p> <hr style="border: 0; border-top: 1px solid black;"/> <p style="margin: 0;">Contact Person</p>		
<p style="margin: 0;">COO</p> <hr style="border: 0; border-top: 1px solid black;"/> <p style="margin: 0;">Title</p>		
<p style="margin: 0;">210-859-3259</p> <hr style="border: 0; border-top: 1px solid black;"/> <p style="margin: 0;">Telephone Number</p>		
<p style="margin: 0;">rfp@kastechssg.com</p> <hr style="border: 0; border-top: 1px solid black;"/> <p style="margin: 0;">E-Mail Address</p>		
<p style="margin: 0;">6918 Corporate Dr, Suite A1</p> <hr style="border: 0; border-top: 1px solid black;"/> <p style="margin: 0;">Street Address of Principal Place of Business</p>		
<p style="margin: 0;">Houston/Texas</p> <hr style="border: 0; border-top: 1px solid black;"/> <p style="margin: 0;">City/State</p>		
<p style="margin: 0;">77036</p> <hr style="border: 0; border-top: 1px solid black;"/> <p style="margin: 0;">Zip</p>		
<p style="margin: 0;">6918 Corporate Dr, Suite A1</p> <hr style="border: 0; border-top: 1px solid black;"/> <p style="margin: 0;">Complete Mailing Address</p>		
<p style="margin: 0;">Houston/Texas</p> <hr style="border: 0; border-top: 1px solid black;"/> <p style="margin: 0;">City/State</p>		
<p style="margin: 0;">77036</p> <hr style="border: 0; border-top: 1px solid black;"/> <p style="margin: 0;">Zip</p>		
<p style="margin: 0;">Acknowledgment of Addenda: #1 <input checked="" type="checkbox"/> #2 <input checked="" type="checkbox"/> #3 <input checked="" type="checkbox"/> #4 <input type="checkbox"/> #5 <input type="checkbox"/></p>		
<p style="margin: 0;">By signing below, you hereby certify that the information contained in this proposal and any attachments is true and correct and may be viewed as an accurate representation of proposed services to be provided by this organization. You agree that failure to submit all requested information may result in rejection of your company's proposal as non-responsive. You certify that no employee, board member, or agent of the North Central Texas Council of Governments has assisted in the preparation of this proposal. You acknowledge that you have read and understand the requirements and provisions of this solicitation and that the organization will comply with the regulations and other applicable local, state, and federal regulations and directives in the implementation of this contract. And furthermore, that I certify that I am legally authorized to sign this offer and to submit it to the North Central Texas Council of Governments, on behalf of said offeror by authority of its governing body.</p>		
<p style="margin: 0;"></p> <hr style="border: 0; border-top: 1px solid black;"/> <p style="margin: 0;">Authorized Signature</p>		

Exhibit 1: Signed Certificate of Offeror

1.2 Statement of Understanding

A brief statement of the respondent's understanding of the work to be done or desired deliverables requested in the solicitation.

Kastech Solutions LLC, ("d/b/a Kastech Software Solutions Group"), a Houston, TX based IT Solutions and Services Company, would like to thank The North Central Texas Council of Governments ("NCTCOG") for this opportunity to submit our proposal in response to the Request for Proposal (RFP# 2025-017) to provide Enterprise Resource Planning (ERP) Consulting Services to the NCTCOG TXShare Program.

Based on our detailed reading of the RFP document, we understand that by responding to this RFP, we have the opportunity for being selected as one of the qualified firms/entities to provide a wide range of ERP consultancy services to be hosted on the TXShare Cooperative Purchasing Program.

As a chosen vendor under the TXShare Cooperative Purchasing Program, we will be able to offer our ERP consulting services to any public entity or non-profit, nationwide, that uses the TXShare contract. Here is a brief description of the service categories and the associated tasks and deliverables:

- **Category 1:** Provide ERP Consultancy Services to maintain/repair/modify existing TXShare Entity's or NCTCOG's ERP infrastructure with an objective to extend their life span and enhance functionality.
- **Category 2:** Provide ERP Consultancy Services to assist NCTCOG or TXShare Entity's with research and preparation for ERP implementation. This would involve strategic guidance and resources right from the selection of an ERP software and implementation vendor to come up with a detailed implementation plan including data migration from the legacy system(s).
- **Category 3:** Provide ERP Consultancy Services to implement or replace an ERP system for NCTCOG or TXShare Entities. This would involve executing full-scale ERP implementation projects, ensuring seamless integration, data conversion, user training, change management, project management, user acceptance testing and post-launch support adhering to the industry best practices.
- **Category 4:** Provide Standalone Review and Documentation Services of TXShare Entity's current business processes, process flows, process integration, and identification of pain points prior to their ERP implementation. This would involve in-depth business analysis services by experienced ERP professionals who would provide their detailed review comments and recommendations on optimizing business process flows, bringing in automation for repetitive tasks, building seamless integration with various internal and external components/systems/data sources and enhanced user experience.
- **Category 5:** Provide ERP system upgrades and/or migrations from on-premises to cloud solutions, and vice versa for the NCTCOG or TXShare Entities. This category was added as part of the Addendum No. 1. This service would require a vendor to provide a comprehensive plan and assistance to upgrade a deployed ERP system into newer versions and/or migrating from on-premises to cloud platforms for better scalability and cost efficiency.
- **Category 6:** Provide ERP Consultancy Services otherwise not anticipated in this RFP. In this service category, we understand we could provide ancillary products and services that are designed for ERP projects. Examples are tools/platforms for data conversions, reporting,

forward-thinking solutions, etc. This will also include conducting detailed studies to identify and address emerging challenges in the ERP landscape for public sector.

In summary, Kastech understands the objective(s) of this program and would make every effort to participate in it and contribute towards its success. Kastech would also like to confirm that we are proposing our services for all six (6) categories specified above.

2 Key Personnel

Attach statements of qualifications or resumes for all managers, supervisors, and other team members who will be involved in the management of the delivery of goods or services under this RFP.

Kastech will assign seasoned professionals with extensive IT experience especially in the public sector to manage the delivery of ERP consultancy services under the NCTCOG TXShare Program. Below is the brief professional bio including the statement of qualifications for proposed key personnel.

2.1 Proposed Key Personnel #1

Name: Sridhar Koneru Title: Program Director ERP Strategist	
Key Highlights: <ul style="list-style-type: none">▪ Bachelor of Engineering in Electronics & Communication▪ 20+ years of total IT experience, with focus on ERP technologies across industry verticals▪ Prominent clients:<ul style="list-style-type: none">• State of Texas – HHSC• County of San Joaquin, California• City of Santa Clara• Lone Star College• Govt of Brunswick, Canada• Pima Community College• Amazon Development Center• Aims Community College• University of Los Andes, Columbia• Ohio State University• UBER Canada▪ Core skill set relevant to this engagement:<ul style="list-style-type: none">• IT Strategy• Technology Roadmap• ERP Assessment and Strategy Development• People Management	Experience Summary: <p>Sridhar is a seasoned IT professional with a proven record of building, managing and growing technology departments within organizations.</p> <p>Blended with in-depth technical knowledge, refined business acumen and management skills, he comes with over 20 years of progressive experience in developing and executing visionary technology strategies that redefine enterprise processes, year on year growth in revenues.</p> <p>He brings to the table his extensive experience with large-scale implementation and upgrade projects with expertise on ERP projects. His core skills include third-party integrations, data management, data infrastructure management, user training, and change management.</p> <p>At Kastech, he has been responsible to provide strategic direction, manage the ongoing and new ERP projects and is responsible for resolving technical problems, managing team performance, tracking finances and controlling the quality of service delivery interacting with clients, employees and management. He also serves as the Workday ERP and Data Services Practices Head at Kastech.</p> <p>Sridhar has also been developing strategies and roadmaps for the product division to ensure streamlined operations and rapid ROI for internal and external projects at Kastech. He has designed several in-house data management and data migration tools that are efficient and highly cost-effective and play a pivotal role in ERP projects. He has led teams in delivering operational</p>

Name: Sridhar Koneru Title: Program Director ERP Strategist	
<ul style="list-style-type: none"> • <i>Program management</i> • <i>Pre-sales to Delivery</i> • <i>Decision making</i> • <i>Innovation and Digital Transformation</i> • <i>Business strategy & planning</i> 	<p>reports and dashboards by building actionable KPIs at all levels of the organization. Some of his core responsibilities are as follows:</p> <ul style="list-style-type: none"> • Accountable for end-to-end service delivery within portfolio of customers, while demonstrating a critical partnership with internal and external stakeholders. • Lead the Incident, Problem and Change functions working across business departments to improve practices. Ensure IT Service Management practices are well understood and maintained across all technical delivery teams. • Proactively monitor and measure the success of the project using various KPI's and comparing with industry standards. • Manage team operations, including portfolio planning, resource workload, financial governance, processes /procedures and risk management. • Accountable for the governance of the projects and also serve as an escalation point for the clients. • Head the IT Change Board to coordinate requests for estimation and resourcing for projects which are linked to/impact the overall IT delivery. • Manage on-going plans for delivery activities in conjunction with the PMO Manager and any allocated resources to ensure that the team delivers to committed tasks. • Work with delivery managers and team to regularly monitor and review performance against delivery SLAs. • Ensure best practices and processes are followed, across the team for the consistent delivery of the projects.

Table 1: Profile of Key Personnel #1

2.2 Proposed Key Personnel #2

<p>Name: Vamsi Kumar R Title: Delivery Manager</p>	
<p>Key Highlights:</p> <ul style="list-style-type: none"> ▪ Bachelor of Technology In Mechanical Engineering, 2000, National Institute of Technology, India ▪ Leadership Principles Online Certificate Program, 2021, Harvard Business School ▪ Architecting on AWS Certificate, 2021, AWS Training and Certification ▪ 20+ years of total IT experience, with focus on IT service delivery and management ▪ Prominent clients: <ul style="list-style-type: none"> • <i>Meharry Medical College</i> • <i>City of Santa Clara</i> • <i>Mac Ewan University</i> • <i>American Express</i> • <i>Tata Consultancy Services</i> • <i>Banco Commercial Portuguese</i> ▪ Core skill set relevant to this engagement: <ul style="list-style-type: none"> • <i>Program & Project Management</i> • <i>Service Delivery Optimization</i> • <i>Team Leadership</i> • <i>Cross-functional Collaboration</i> • <i>Oracle PeopleSoft ERP Applications</i> • <i>People Management</i> • <i>Institutional IT Budget Management</i> • <i>Digital Transformation Solutions</i> 	<p>Experience Summary:</p> <p>Vamsi is a results-oriented Information Technology Leader with 24 years of experience in IT service delivery and management. He comes with extensive experience managing ERP applications including full-cycle implementations, upgrades, digital transformation projects, delivering Application Management Services, establishing and managing ERP Programs, and administration of ERP departments.</p> <p>He has served as a trusted partner to business teams, collaborative facilitator and is known for developing high performing teams, delivery excellence and creating business value.</p> <p>He has experience with integrated enterprise IT environment management and enterprise architecture. He has developed IT plans in alignment with organizational strategic goals.</p> <p>Some of his prominent work experience are included below:</p> <ul style="list-style-type: none"> • At Meharry Medical College, he is currently leading delivery management, resource management, budget management, and client stakeholder management in a multi-vendor environment for Workday Student implementation project. Data migration, integrations, reports development and support for current ERP modules are the core scope items for this engagement. • At City of Santa Clara, he has provided project management and delivery management support for the Oracle PeopleSoft ERP (Accounts Receivable module) Implementation Project ensuring timely delivery and resource management. • He was accountable for IT Service Delivery of critical Student, HR, and FSCM administrative business processes and services across Mac Ewan university business areas leading a team of 4 team leads and 25 professional IT staff. He provided leadership support for the Business Intelligence team for 3 years. The Application Management Services portfolio consisted of 8 core business applications. Most importantly, he also led the migration of PeopleSoft ERP applications to AWS cloud infrastructure under the University's Cloud first strategy and helped achieve

Name: Vamsi Kumar R Title: Delivery Manager	
	<p>significant cost savings by replacing legacy contracts with cost effective AWS services.</p> <ul style="list-style-type: none"> Over the past several years, he was engaged as a consultant for providing Project Management and Delivery Management services, leading teams up to 30 in the successful delivery of complex, time sensitive ERP projects that includes application upgrades, module implementations.

Table 2: Profile of Key Personnel #2

2.3 Proposed Key Personnel #3

Name: Guru Prasath Title: Quality Assurance Manager	
<p>Key Highlights:</p> <ul style="list-style-type: none"> Master of Computer Applications (MCA) 15+ years of total IT experience Certifications: <ul style="list-style-type: none"> Oracle Certified PeopleSoft Consultant (Functional & Technical) Certified Project Director from Global Association for Quality Management PRINCE2 Practitioner in Project Management ITIL Foundation in IT Service Management Certified SAgile 5 Agilist PMP Trained by IIPM (International Institute of Project Management) Prominent clients: <ul style="list-style-type: none"> City of Santa Clara County of San Joaquin Mercedes-Benz R&D Private Limited Standard Chartered Bank UST Global 	<p>Experience Summary:</p> <p>Guru comes with specialized skills in Quality Assurance, Project Portfolio Management, Program Management, and Product Life Cycle oversight. He has proven track record of contributing/adding value to the delivery of reliable, functional, and secure software products by systematically testing and identifying the areas for improvement for several critical ERP projects.</p> <p>Under his leadership and guidance, project teams are able to succeed and produce outstanding results, while also developing their skills through mentorship. His core strength is his strategic approach to Software Quality Assurance. He emphasizes the importance of employing the industry standard testing processes, best practices, and compliance requirements as applicable to every engagement/project.</p> <p>By effectively monitoring project progress, he has contributed to the continuous improvement of the software development process by providing feedback on processes, tools, and methodologies. Also participated in retrospective meetings to discuss and implement improvements.</p> <p>With his expertise in leading project teams, introduced advanced and automation testing to accomplish functional, regression, performance, and security testing. This ensures that all team members are aligned on project goals and helps improve efficiency, especially in repetitive and time-consuming tasks.</p> <ul style="list-style-type: none"> Guru started his career in ERP as a Technical lead for Oracle PeopleSoft ERP (HCM) Application for Payroll Interface & Benefits Modules. He presented different options to the client for overcoming business challenges with functional and technical solutions. He was responsible for design of the

Name: Guru Prasath Title: Quality Assurance Manager	
<ul style="list-style-type: none"> ▪ Core skill set relevant to this engagement: <ul style="list-style-type: none"> • <i>Program & Project Management</i> • <i>Quality Assurance</i> • <i>Service Delivery Optimization</i> • <i>Team Leadership</i> • <i>Business Analysis and Strategy</i> 	<p>reports and programs for the HRMS system and development of new interfaces from PeopleSoft to third-party system(s).</p> <ul style="list-style-type: none"> • At UST Global, Guru was engaged to serve as Onshore Project Lead and Single point of Contact for client's team to address issues/queries related to process flows and provide necessary guidance. He also provided techno-functional support of PeopleSoft ERP (HCM) modules for production support, conversions, interfaces and modifications. <p>Guru's areas of expertise in addition to Quality Assurance, include Project Portfolio Management, Planning and Development of Roadmaps of Production Releases, Continuous Integration & Delivery, Transition of Waterfall to Agile Model, Business Analysis & Strategy, Management Consulting, Program Management, Resource & Vendor Management.</p>

Table 3: Profile of Key Personnel #3

2.4 Proposed Key Personnel #4

Name: Steve Hudson Title: Director - Customer Success	
Key Highlights: <ul style="list-style-type: none"> ▪ College of DuPage (2003-2004) - AAS Physical Education ▪ Purdue University (2005-2006) - AAS Social Work – Childhood Development ▪ Elgin Community College (2009-2010) - EMT/Paramedic – Firefighting Program ▪ Certifications: <ul style="list-style-type: none"> • <i>Workday Certified</i> • <i>B-Cert 2009 & P-Cert 2010</i> ▪ Prominent clients/accounts: <ul style="list-style-type: none"> • <i>Texas A&M</i> • <i>City of Boulder</i> • <i>State of Maine</i> • <i>Abbott Labs</i> • <i>AbbVie</i> • <i>Citibank</i> • <i>Wells Fargo</i> • <i>SC Johnson</i> 	Experience Summary: <p>Steve is a former Professional Baseball Player with a demonstrated track record of successful Technology Sales, Recruiting, Strategic Relationship Development, Professional Services and Channel Management around various SaaS products including Workday.</p> <p>Steve is a creative and hard-working problem solver who fits as a team lead as well as a team member. Over the last 3 years, he has worked exclusively in the Workday ERP ecosystem driving new business through Application Managed Services/Projects as well as a year of Workday recruiting.</p> <p>Steve has joined Kastech as a Director - Customer Success.</p> <p>Some of his prominent work experience are included below:</p> <ul style="list-style-type: none"> • As a Business Development Manager at AGILYSIS, Steve was responsible for uncovering opportunities and gathering requirements for Managed Services, Application Managed Services (AMS), Advisory Services, Project Management, New Module Implementation (Phase X) and Stabilization. Worked extensively with client HR/IT/App Engineering teams on discovery calls with architects and developers to obtain requirements around more specific configurations, integrations, data management, API's, Tech stacks, to identify right resources to onboard. He developed and fostered

Name: Steve Hudson Title: Director - Customer Success	
<ul style="list-style-type: none"> • Nextdoor • Oaktree • AAA ▪ Core skill set relevant to this engagement: <ul style="list-style-type: none"> • Strategic Relationship Development • Customer relationship management • Partner Marketing • Partner Network management and Channel Management around various SaaS products including Workday ERP • In-depth understanding of Workday ERP ecosystem 	<p>relationships with current long-term client base to drive new opportunities.</p> <ul style="list-style-type: none"> • He has managed Workday ERP engagements for two public sector clients – State of Maine and City of Boulder. • At TBI Inc., Steve served as a National Channel Manager (I & II) with the primary responsibility to grow and maintain a portfolio of partners. He successfully built a partner portfolio from scratch and supported both online SEO/SEM partners (inbound) and traditional partners. <p>Steve also served as an Account Manager (for Verizon Business Mid-Market & Enterprise programs) leading a team of nine (9) Account Managers where he reviewed cold calls, designed calling scripts, managed Team KPI and R2S, provided training through group and/or 1 on 1 meetings on Products, Promotions, and Providers. He built strategic relationships with Verizon that allowed TBI to consistently receive the highest quality leads among partners which increased their conversion rate by 37%.</p>

Table 4: Profile of Key Personnel #4

3 References

Include at least four (4) recent references for customers (preferably public agencies) for whom you have provided services similar to those requested in this solicitation within the last five (5) years. Please include the organization's name (if applicable), contact person, phone number, and email address for each reference.

3.1 Reference #1 – City of Santa Clara

Client Name:	City of Santa Clara
Service Categories:	ERP Implementation and consulting services; ERP module optimization
Project/Engagement Details:	The City's Oracle ERP (PeopleSoft FSCM) landscape consists of: PeopleSoft FSCM 9.2 Image 27 8.55.16 - Modules implemented: Accounts Payable, Purchasing, Inventory, Commitment Control, Mobile Inventory, Accounts Receivable and Billing
Contract period: March 2022 – May 2026	<p>In March 2022, Kastech has been engaged by the City of Santa Clara for the following:</p> <ul style="list-style-type: none"> • PeopleSoft 9.2 Asset Management Implementation: Implementation of PeopleSoft Asset Management module by reviewing fixed assets module features and provide recommendations to transition all City fixed assets from Sage Fixed Assets System and utilize appropriate features of

	<p>the PeopleSoft module. All assets will be tracked and associated depreciation entries will be generated by PeopleSoft.</p> <ul style="list-style-type: none"> • PeopleSoft 9.2 Billing and Accounts Receivable Implementation: Implement a comprehensive billing and collection process using PeopleSoft as the origin system of billing input and interface with other systems to track payment receipts. Evaluate the City's process of sending invoices, collecting payments, and pursuing unpaid balances, implement the Accounts Receivable module to fully interface with the General Ledger, and take advantage of PeopleSoft to decentralize billing input across City functions. • Purchasing System Improvements: Conduct a detailed analysis of the City's current business structure and provide recommendations for improving the use of PeopleSoft FSCM 9.2 Purchasing ("PeopleSoft Purchasing"). <ul style="list-style-type: none"> • Review integrations with other PeopleSoft applications including: • PeopleSoft Asset Management • PeopleSoft eProcurement • PeopleSoft General Ledger including Commitment Control • PeopleSoft Inventory • PeopleSoft Payables • PeopleSoft Strategic Sourcing • PeopleSoft Supplier Contract Management
Point of Contact Details:	<p>Linh Lam, Assistant Director of Finance llam@santaclaraca.gov 408-615-2345</p>

Table 5: Client Reference #1

3.2 Reference #2 – Washington State Board for Community & Technical Colleges

Client Name:	Washington State Board for Community and Technical Colleges (SBCTC)
Service Categories:	ERP Implementation; ERP Consultancy services
Project/Engagement Details:	<p>SBCTC is a multi-campus/site environment. SBCTC uses PeopleSoft HCM, FSCM and Campus Solutions as part of its enterprise-wide IT initiative. The entire infrastructure for SBCTC PeopleSoft applications is hosted in AWS. During the initial contract (May 2015-Dec 2017), Kastech's role has been to provide PeopleSoft staffing, consulting, and support services. Kastech's second contract with SBCTC (February 2018 – Present) involved a more critical role.</p>
Contract Period: February 2018 – December 2022	<p>SBCTC initiated a 100-million-dollar project for implementing PeopleSoft suite of applications for 34 public community and technical colleges. The incumbent vendor utilized more than 80% of the budget but could roll out the applications for only three (3) colleges. This is when SBCTC engaged Kastech to implement the applications for all remaining colleges within the previous project deadlines and for a budget that was 20% of the initial approved funds plus some extra funds.</p>

	<p>Kastech used a phased approach to implement the applications for remaining 31 colleges within the project timeline in a cost-effective manner.</p> <p>Go-live was planned in phases for 34 colleges being divided into six (6) Deployment Groups. 15 colleges are live so far and the total college population went live by end of 2022. Today, we continue to provide our PeopleSoft consulting services on need basis.</p> <p>Kastech has been providing highly experienced PeopleSoft techno-functional consultants for implementing, upgrading, and supporting PeopleSoft applications (HCM, FSCM & CS). Our IT staff are involved in performing Business Process Evaluation and documentation, Fit-gap analysis, Retrofitting, Architecture, Development, Configuration, Customizations, Data Conversions, testing, technical conversion and documentation, training, and so forth.</p>
Point of Contact Details:	<p>Dani Bundy, Director CTC link Peoplesoft customer support</p> <p>dbundy@sbctc.edu</p> <p>(360) 619-8960</p>

Table 6: Client Reference #2

3.3 Reference #3 – Harris County, TX

Client Name:	Harris County, State of Texas
Service Categories:	ERP Consulting Services
Project/Engagement Details: Contract Period: August 2019 – Ongoing	<p>Harris County, TX has been using Oracle PeopleSoft ERP application(s) for their human resources, financials and supply chain management.</p> <p>Kastech has been providing ERP consulting services to the County since 2019. The scope covers maintaining production system, requirements gathering, application configuration, end-user support, and testing for ongoing enhancements & projects to the production application. From ERP techno-functional consultants to database administration to solution architects, test engineers and technical writers, we have been providing them with an experienced team, on need basis.</p> <p>Our ERP consultants have been involved to perform the following tasks:</p> <ul style="list-style-type: none"> • Support the implementation of PeopleSoft HCM v9.2 and FSCM v9.2 applications. • Assist in PUM Images and provide Managed Services for PeopleSoft HCM, FSCM applications. • Provide database administration services. • Assist with fit-gap analysis, Retrofitting, Customizations and Data Conversions. • Replace custom objects / bolt-on with new delivered features with minimal customizations. • Provide documentation and training on-demand.
Point of Contact Details:	<p>Venkat Gangula, ERP Architect</p> <p>770-871-0380</p>

Table 7: Client Reference #3

3.4 Reference #4 – Pima Community College

Client Name:	Pima Community College
Service Categories:	Standalone Review and Documentation Services for current ERP landscape
Project/Engagement Details: Contract Period: May 2022 – July 2022	<p>In May 2022, PIMA engaged Kastech to perform an overall Banner ERP assessment with a technical deep-dive and recommend the college with best-practices and Banner solutions. The engagement involved comprehensive Banner ERP IT assessment to provide a technical deep dive into Banner servers, applications and third-party integrations.</p> <p>Assessment Approach:</p> <ul style="list-style-type: none"> • The assessment (followed by recommendations and roadmap) was conducted in a hybrid mode (as desired by Illinois Tech) over a period of eight (8) weeks. • It was a comprehensive assessment wherein our team interfaced with the existing end-to-end ERP landscape and conducted intense workshops with key PIMA staff and stakeholders across the identified verticals. • Week 1-4 (Remote): Learn and adapt to Banner environment. Engage with teams, conduct workshops, implement conducive approaches, and identify gaps. Environmental Scans, Feasibility Studies, Survey result analysis, crafting of roadmap and recommendations. • Week 5-6 (On-site): Report Submission and discussion on the findings • Week 7-8 (Remote): Finalization of recommendations/roadmap and sign-off <p>Business Outcome:</p> <p>The assessment was successful in providing information related to Pima technical Banner infrastructure that also delineates the relationships between technical components, applications, and third-party systems. The assessment report provided the means to manage more effectively the Banner application/Enterprise Systems, allocate resources, prioritize system effort, and execute Banner operations via senior management’s understanding of the Banner system and use. Through the assessment process, strategic concerns were identified that encompassed institutional dysfunction (related to IT Governance, Institutional Integration, Standards, Data Governance, and Metrics/Continuous Improvement) that required identification and remediation.</p> <p>Kastech also presented a comprehensive 18-months Roadmap that included our key recommendations on policies, establishment of an IT Governance Council and some re-assessment required in core areas.</p>
Point of Contact Details:	<p>Jack Satterfield, CTO</p> <p>jcsatterfield@pima.edu</p> <p>(520) 429-2017</p>

Table 8: Client Reference #4

3.5 Reference #5 – San Joaquin County General Hospital (SJCGH)

Client Name:	San Joaquin County General Hospital (SJCGH)
Service Categories:	ERP Consulting Services
Project/Engagement Details: Contract Period: July 13, 2022 - June 28, 2023	<p>SJCGH contracted Kastech to provide ERP consulting services through experienced professionals such as ERP Application/Solution Architects, Business Architects and Test Automation specialists to support applications, interfaces and multiple ancillary systems.</p> <p>On April 2024, Kastech was again engaged for a six-month duration for providing data warehouse development services. Kastech consultants (Power BI Technical Specialist, Data Developer and tester and Information Analysts) to setup an operational data warehouse (ODS) using PowerBI. The scope involved helping SJCGH in collecting requirements, creating data model scripts, preparing automation tasks in Power BI and publishing to the operational data store. The resources would collect information from Finance users for the data extracts and reports needed and would facilitate the meetings and confirmed the data transfer. The resources would validate and confirm data load into the SQL server and Tableau/ HealtheIntent data objects.</p>
Point of Contact Details:	<p>Shakir Awan, CIO</p> <p>sawan@sjgh.org</p> <p>(209) 992-9521</p>

Table 9: Client Reference #5

4 Project-Related Experience and Qualifications

4.1 Kastech Background

Include a brief statement of the respondent's background, including years in business, for the requested services and any additional pertinent information on how your proposed solution meets each requirement. Provide any pertinent additional functionality and/or services not outlined in the Scope of Work that you wish to offer. It should also clearly indicate any major requirements that cannot be met by the organization or individual.

Kastech Solutions LLC (d/b/a "Kastech Software Solutions Group") was incorporated in 2007 in Houston, Texas. Kastech started its journey as one of the most competitive and reliable IT staffing and consulting services providers. Today, Kastech has grown to become a USD 120+ Million Company with 1,500+ skilled employees across the globe.

Kastech is an **ISO 9001:2015 certified** and **CMMI Level III Accredited Company**. Please note that Kastech currently holds **ISO 27001:2013, CMMI Development V2.0 (CMMI-DEV) - ML 3, and SSAE 18, SOC 2 Type 2** certifications. Kastech is uniquely differentiated in the marketplace through its trusted client relationships, industry differentiation, global footprint, technology leadership and operational excellence. Serving excellence in more than 40 industries across 13 industry groups, at Kastech, everything we do to execute our strategy and deliver our vision comes to life through our people.

Kastech is continuously striving to expand and grow by offering the latest technology Solutions, Services, and Resources.

The following exhibit shows some of our clients across a variety of industries including SLED:



*All logos seen above are for display purposes only and belong to entities to whom such logos represent.

Exhibit 2: Kastech Clientele (A representative list)

Kastech's core areas of expertise in the ERP space include the following:

#	ERP Consulting Services	Practice areas
1.	Implementation and upgrades	<ul style="list-style-type: none"> ERP software applications <ul style="list-style-type: none"> Oracle ERP (PeopleSoft, E-Business Suite, Oracle Fusion Cloud) Ellucian Banner Workday SAP UKG
2.	System Integration	
3.	ERP Application Managed Services	
4.	Cloud Hosting	<ul style="list-style-type: none"> Lift-n-shift on-premises applications to cloud
5.	ERP IT Staff augmentation	<ul style="list-style-type: none"> Across all leading ERP technologies and ERP job titles
6.	Advisory services	<ul style="list-style-type: none"> ERP assessment, recommendations, and roadmap Implementation readiness, change management, and oversight Business analysis and Process flow assessments Digital transformation assessment, recommendations, and roadmap
7.	Data Engineering Services with respect to ERP applications	<ul style="list-style-type: none"> Data Consulting Services Data Management Platform and Data Warehouse Management Data Platform/Warehouse Modernization Data Governance & Security

#	ERP Consulting Services	Practice areas
		<ul style="list-style-type: none">• Data On-prem to Cloud Migration• Data Modelling• Data Infrastructure Management• Data Research and Analysis• Data Analytics & Support Services• Data Retention & Purging, and Data Migration Services• Data Loading and ETL Services• BI / Data Warehouse Implementation

Table 10: ERP Consulting Services

Owing to our strong ERP experience for over a decade, Kastech has also built several products/tools to expedite ERP projects such as implementations, replacement of legacy systems, upgrades, and assessments. We have also partnered with other third-party vendors for products that are needed to bring in efficiency into business processes.

Please refer to our response to **Question #7 in Section 5.5 -Response to Organizational Operations** of this document to get an overview of the products/tools and associated services that we are proposing for this engagement.

Kastech is qualified and experienced to deliver the services as outlined in the RFP. We provide our services with every aspect related to the ERP software solutions. However, we do not offer our consulting services for managing the IT infrastructure/hardware.

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4.2 Kastech Qualifications for NCTCOG's TXShare Program

Provide a written response regarding organization's and/or individual's ability to meet each requirement as outlined in the Scope of Work (Section 5.0).

Kastech is qualified for NCTCOG's TXShare Program for ERP Consultancy services required by the public sector entities across all states because we have the requisite experience, capabilities and proven track record as described in the following section:

Dedicated ERP Practice with Industry Focus:

With ERP as its core business, Kastech has built dedicated practices for each **leading ERP technology** - Oracle ERP (PeopleSoft, E-Business Suite, Oracle Fusion Cloud), Ellucian Banner, Workday, Salesforce, and SAP – all of which have a significant footprint in the **SLED industry**.

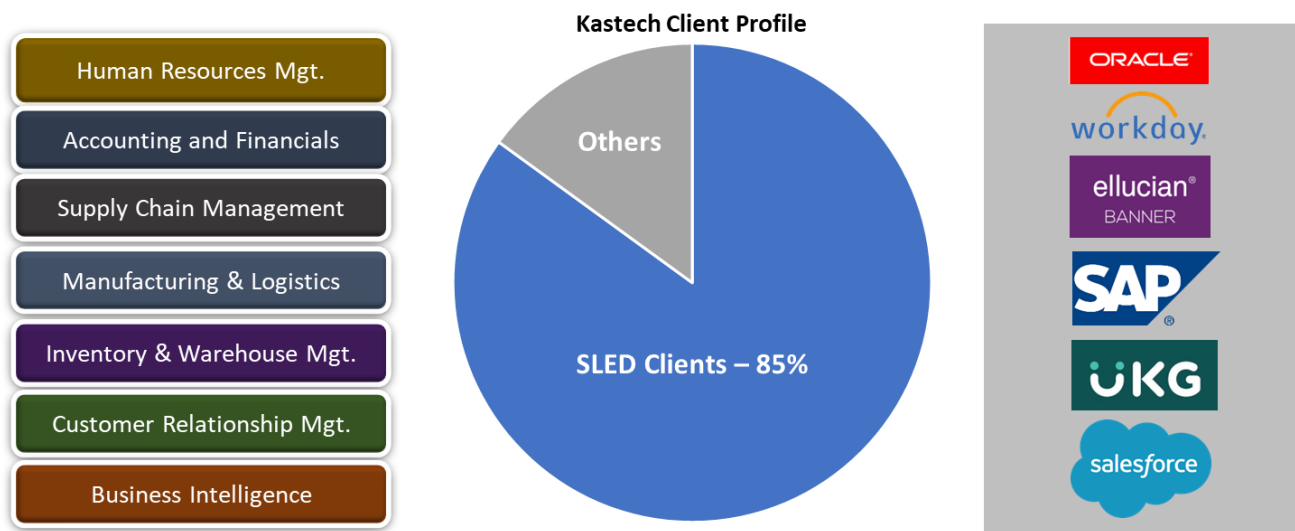


Exhibit 3: Kastech's ERP Practice

Some of the key highlights of our ERP practices are listed below:

- Each ERP practice is led by an experienced IT professional and maintains its own Center of Excellence that includes qualified and vetted resources who are dedicated to that ERP practice.
- Kastech boasts of **1,500+ ERP consultants** across technologies.
- **Oracle, Banner, SAP, Workday & ITIL** Certified Consultants.
- Over **60% of our ERP consultants** have **over 8 years of experience** and **40% have over 12+ years of experience** in implementing/supporting leading ERP applications for several large-scale public and commercial entities.
- Consultant skills span the functional breadth and technical depth of ERP applications.
- Additionally, we have access to a pool of **15,000+ pre-vetted ERP staff in a database** of talented personnel with a range of skills and experience that can be appropriated to support tasks during any ERP engagement, when needed.
- Over **100+ direct clients** across Oracle, SAP, Banner and Workday - Human Capital Management, Supply Chain, CRM and ELM applications.

- **15+ years** of rich experience in handling large delivery engagements.

Certifications and Partnerships:

Kastech has the required certifications, partnerships and accreditations that have continuously strengthened our ERP practice over the past one decade.



Exhibit 4: Kastech Certifications and Accreditations

Strong Public Sector Experience:

Kastech boasts of a rich clientele which includes **100+ direct clients from SLED domains**. Public Sector has always been one of our prime focus areas across our core offerings. We have been delivering our ERP Consultancy services to various counties, city governments, transport authorities, education departments, and other public sector entities.

We have an in-depth understanding of the procurement processes and contractual obligations including contract performance evaluation that are specific to the public sector vertical.

Here is a representative list of some of our prominent public sector clients who we have engaged with in the past one decade to for their ERP applications' landscape:



Exhibit 5: Public Sector Clients (A representative list)

Extensive Partner Network:

At Kastech, we have built a strong network of partners across the nation to effectively service our clients. This partner network augments our ERP resource pool all year round and provide logistical support whenever necessary. Many of these partners are engaged as subcontractors during large-scale projects.

Proven Service Delivery Methodologies:

Kastech has a **100% successful track record in ERP engagements** and this can be attributed to our service delivery methodologies that have been time tested and proven effective every-time. The key elements that are an integral part of our service delivery methodologies include:

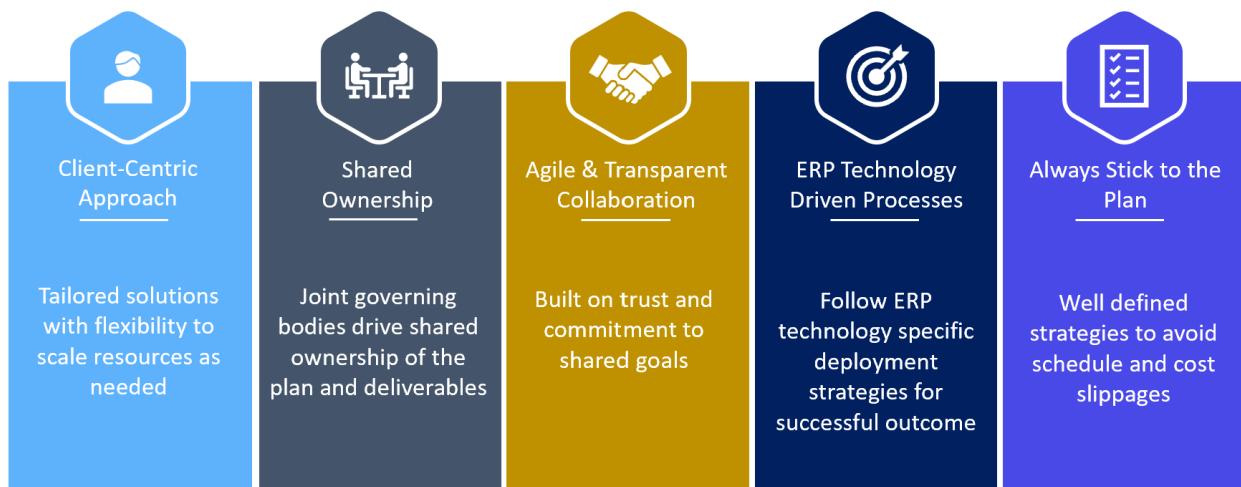


Exhibit 6: Key Attributes of Service Delivery Methodology

- Kastech will work in close collaboration with NCTCOG and Participating Entities' project management and team personnel.
- Communication protocols and roles and responsibilities will be mutually decided and agreed upon between Kastech and NCTCOG and Participating Entities.
- Every aspect of the project will be measured and tracked against set parameters. Dashboards for reporting and monitoring will be readily available online for all project stakeholders.

Value-Add Products and Services:

In addition to ERP consultancy services, Kastech also offers several ancillary tools/services that play a critical role in ERP engagements. Please refer to our response to **Question #7 in Section 5.5 -Response to Organizational Operations** of this document to get an overview of these products/tools and associated services.

These tools/services cover important aspects as described below:

1. Data engineering services using Kastech's SimpliData

Data engineering lays the foundation for data-driven success by enabling organizations to collect, store, process, and analyze data at scale. It involves the design, development, and maintenance of data pipelines, data lakes, and data warehouses. Effective data engineering ensures data quality, accessibility, and integration, facilitating seamless data consumption by various stakeholders within the organization.

Some key offerings of our data engineering services relevant to ERP projects include:

- Data Governance
- Data Architecture
- Data Integration
- Data Warehousing
- Data Visualization & Analytics

2. Automated data conversion and migration using Kastech's SimpliData

Streamlining and automating the data migration process from one ERP platform to another is made easy with SimpliData. It automates the extraction, transformation, and delivery of data for all ERP application implementations. This includes ERP 'all conversion' permutations: Cloud to Cloud, On-Premise to On-Premise, and On-Premise to Cloud which is the most complex iteration.

3. Performance Testing Automation

Early identification of load limitations helps to configure the ERP system appropriately to avoid unexpected crashes during the ERP upgrade. Kastech's performance testing tool helps identify the performance bottle necks ahead of time and prepare accordingly.

Assessing the production readiness and evaluating the system stability are two critical areas covered by this tool.

4. Testing-as-a-Service

Kastech also offers "Testing-as-a Service" for various tests including functional testing, performance testing, device compatibility testing, usability testing, load testing, stress testing, mobile app testing, and

regression testing. We use both manual testing procedures and automated tools for these testing services.

Outsourcing ERP testing to us eliminates the need for extensive in-house infrastructure and personnel, reducing overall testing effort and costs with flexibility to scale test resources easily based on the project requirements.

5. User Adoption Support

In our experience of working with public sector organizations, we have observed that new ERP implementations need strong user adoption and support. Kastech can play a significant role by providing user adoption support in the form of providing user training on-demand and documentation support, for example, helping with the creation of user manuals/job aids etc.

6. Enabling electronic signature(s) as part of the business processes

Kastech also offers a proven eSignature solution to serve as an in-box/task list for internal signature display as a task list and workflow for internal signatures of internal documents, applications, and forms that require a signature as part of a business process workflow. Documents may be signed in bulk or individually by authorized signatories.

Table 11: Value Add Features/Offerings

4.3 Proposed Subcontractors and Third-Party Services

If applicable, identify any subcontractors or third-party services that are utilized in the performance of fulfilling this RFP.

Providing ERP Consultancy services across technologies to public sector entities / organizations across all fifty (50) states is a broad scope. So, in order to strengthen our reach as well as capabilities all throughout the contract period, we have identified the following subcontractors.

#	Subcontractor Name	Brief Overview
1.	Mipro Consulting	Mipro is a Milford Michigan based IT Services company specializing in Oracle PeopleSoft and Oracle Fusion Cloud ERP systems. Mipro is one of only 10 companies with a 2024 Oracle PeopleSoft Partner recognition. MIPRO has earned it in both 2023 and 2024. https://miproconsulting.com/
2.	ITAdvanz	IT Advanz offers unrivalled consulting and advisory services around mission-critical SAP implementations and workforce solutions including SAP ERP for different entities – commercial as well as public sector. https://itadvanz.com/
3.	Ikon-Tech Services LLC	Ikon Tech empowers high-performance businesses and governments worldwide with innovative solutions, leveraging their expertise in management consulting, technology services, and digital transformation to drive success across diverse industries. https://ikon-tech.com/

Table 12: Proposed Subcontractors

Please note that Kastech may choose additional subcontractors on-need basis. We would be happy to follow the steps as defined by the NCTCOG TXShare Cooperative Program for adding subcontractors during the contract period.

4.4 Organization Chart

Provide a general explanation and chart which specifies project leadership and reporting responsibilities, and how the team will interface with NCTCOG and Participating Entities' project management and team personnel.

At Kastech, we have an organization-wide commitment - from top management level to contract management level - to support our contracts and customers. The following org chart provides a quick overview of the key personnel assigned to support NCTCOG TXShare Cooperative Program contract:

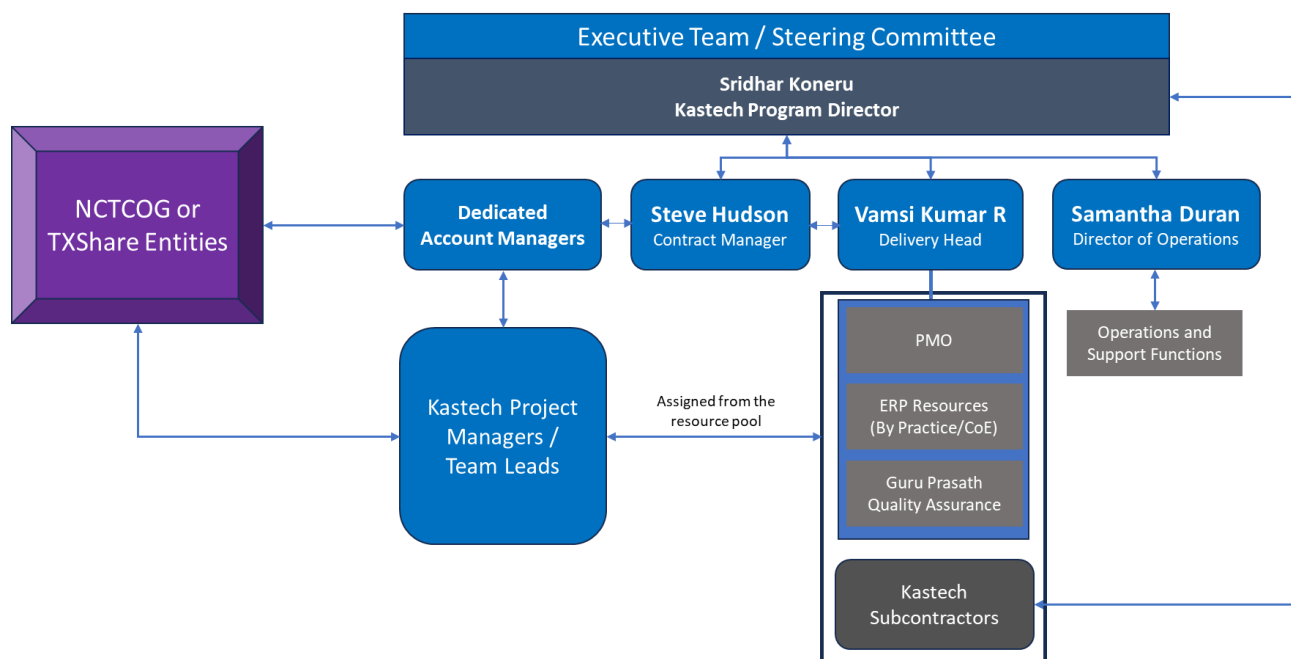


Exhibit 7: High-Level Organization Chart

The above Organization chart specifies our leadership team for this engagement. Please note that Account Managers and Project Managers/Leads will be identified and assigned based on the specific project needs of NCTCOG TXShare entities.

The below table provides a high-level description of the core responsibilities of the leadership and project team members:

Roles	Core Responsibilities
Sridhar Koneru Program Director	<ul style="list-style-type: none"> Emphasis on client satisfaction- right from Day-1. Provide strategic direction while engaging with individual NCTCOG TXShare entities. Building right teams to take any challenge from clients.

	<ul style="list-style-type: none"> • Manage Kastech's ERP business operations relevant to overall NCTCOG TXShare program. • Serve as the final point of escalation in the event of non-performance or unsatisfactory performance of the contract.
Steve Hudson Contract Manager	<ul style="list-style-type: none"> • Assign dedicated Account Manager(s) for eligible NCTCOG TXShare program entities. • Participate in all individual customer engagements (oversee resource sourcing effectiveness and efficiency). Interface with NCTCOG and Participating Entities' Project/Contract Manager on overall service delivery and performance. • Collaborate with the Program Director to make decisions on adding to partner network (subcontractors) to widen the ERP resource pool.
Vamsi Kumar Delivery Head	<ul style="list-style-type: none"> • Stay in constant touch with the Kastech Contract Manager for major updates, issues and escalations. • Provide support and guidance to the project team. • Participate in steering committee meetings. • Seek regular updates from the Project Manager on the project status, major project milestones, deliverables, and quality standards. • Monitor overall project delivery and address any issues/escalations.
Guru Prasath QA Head	<ul style="list-style-type: none"> • Lead, monitor and guide the QA team. • Responsible for assessing the quality of specifications and technical design documents to ensure timely, relevant, and meaningful feedback. • Review the presentations/reports on various QA measures/parameters. • Facilitate Annual Customer Satisfaction Surveys, Informal Customer Feedback, Formal Periodic Program Reviews, Employee Self Assessments as well as Internal Project Audits.
Samantha Duran Director of Operations	<ul style="list-style-type: none"> • Provide all the necessary support for smooth execution of the contractual obligations through collaboration with the support functions as listed below: <ul style="list-style-type: none"> ○ Finance ○ Legal/regulatory ○ IT Support ○ Internal Logistics ○ Human Resources
Assigned Account Manager(s)	<ul style="list-style-type: none"> • Lead the contract and be responsible for ensuring fulfilment of contractual obligations. • Stay in constant touch with the Kastech Contract Manager for guidance, major updates, issues and/or escalations. • Work closely with the Kastech Project Manager/Lead to ensure smooth project execution and timely completion of deliverables.
Assigned Project Manager(s)/Leads	<ul style="list-style-type: none"> • Develop a detailed project plan to track progress. • Monitor overall progress and use of resources, initiating corrective action where necessary. • Report and escalate to management as needed. • Manage the relationship with NCTCOG and Participating Entities' Project/Contract Manager and all stakeholders. • Oversee day-to-day activities of the project.

	<ul style="list-style-type: none"> • Take primary responsibility for team deliverables, including schedule, scope, and coordination across project teams. • Coordinate the status of work across project teams (including sign-off). • Analyze weekly project status reports. Drive issue management process including issue escalation.
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Table 13: Core Responsibilities of Leadership Team

5 Technical Proposal

This section should constitute the major portion of the submittal. Respondent's proposal should detail their capabilities, knowledge and skills related to the desired deliverables and expectations as outlined in Section 5.0: Specifications and Exhibit A.

5.1 Proposed Product Categories and Kastech's Capabilities

Based on our understanding of the Desired Product Categories outlined in the RFP, Kastech proposes to offer its services for **all six (6)** product categories:

Product Category	Description
Product Category #1	Provide ERP Consultancy Services to maintain/repair/modify existing TXShare Entity's or NCTCOG's ERP infrastructure through a contract on the TXShare Cooperative Purchasing Program.
Product Category #2	Provide ERP Consultancy Services to assist NCTCOG or TXShare Entity's research and preparation for ERP implementation through a contract on the TXShare Cooperative Purchasing Program.
Product Category #3	Provide ERP Consultancy Services to implement or replace an ERP system for NCTCOG or TXShare Entities through a contract on the TXShare Cooperative Purchasing Program.
Product Category #4	Provide Standalone Review and Documentation Services of TXShare Entity's current business processes, process flows, process integration, and identification of pain points prior to their ERP implementation through a contract on the TXShare Cooperative Purchasing Program.
Product Category #5	Provide ERP system upgrades and/or migrations from on-premises to cloud solutions, and vice versa for the NCTCOG or TXShare Entities through a contract on the TXShare Cooperative Purchasing Program.
Product Category #6	Provide ERP Consultancy Services otherwise not anticipated in this RFP.

Table 14: Proposed Product Categories

We will also cover **all eight (8) Primary Components** and **few of the "Other Features"** (as listed in the RFP) of an ERP System. The next few sections provide a detailed account of our capabilities, knowledge and skills required to deliver our services for the chosen product categories as listed above.

5.1.1 Kastech's Capabilities for Product Category #1

Kastech ERP consultancy services offerings include **application managed services wherein we maintain/support/enhance a deployed ERP software application** to extend its life span and improve functionality. Please note that our managed services do not include managing the IT infrastructure and/or any hardware required for ERP applications.

Our general support approach for ERP Managed Services focuses on delivering high-quality, reliable, and proactive support to ensure our client's deployed ERP application(s) operate at peak efficiency. This approach is designed to build preventive and perfective maintenance, meeting the evolving needs of our clients while maintaining alignment with industry best practices.

The core elements of our ERP managed services include the following:

A. Preventive and Perfective Maintenance

Our preventive and perfective maintenance plan for deployed ERP applications aims to maintain optimal system performance, enhance security, extend the lifespan of the application environment and also enhancing the system's functionality and usability to better meet evolving business needs and improve overall user experience. This plan includes ***refining existing features, adding new capabilities, adjusting based on user feedback and emerging trends, routine checks, updates, and performance optimization tasks.***

- **Conduct comprehensive audits of system logs, configurations, and settings** to identify potential issues and ensure compliance with best practices. Continuously monitor key performance indicators (KPIs) such as response times, resource utilization, and transaction throughput to identify anomalies. Conduct regular surveys and feedback sessions with end-users to gather insights on system usability and identify areas for improvement. Maintain a structured process for managing user requests and suggestions, prioritizing enhancements that deliver the greatest impact.
- **Analyze and optimize business processes and workflows** to reduce complexity, enhance efficiency, and improve user productivity. Regularly review and optimize database indexes to improve query performance and reduce resource consumption.
- **Collaborate with stakeholders to identify new business requirements** and develop features that address those needs. Identify and remove obsolete or redundant data to free up storage space and improve database efficiency.
- **Ensure that backup procedures are functioning correctly** and conduct regular recovery tests to validate data integrity and availability. Develop and update APIs to facilitate easy and secure integration with third-party applications and services.
- **Apply security patches and updates promptly** to protect the system against vulnerabilities and threats. Conduct regular audits to identify performance bottlenecks and implement optimizations to improve response times and resource utilization. Make architectural adjustments to accommodate increased workloads and ensure the system can scale effectively with business growth.
- **Perform periodic reviews of user access and permissions** to ensure compliance with security policies and prevent unauthorized access.

- **Enhance reporting capabilities by developing advanced analytics** and business intelligence features that provide deeper insights into organizational data. Create custom reports tailored to specific business needs and automate report generation and distribution.
- **Conduct regular security audits** to identify and address potential vulnerabilities in the system.
- **Plan and execute ERP software version upgrades** to take advantage of new features, enhancements, and security improvements. Assess customizations and integrations to ensure they are still necessary and compatible with the latest application versions.
- **Monitor resource usage trends** and plan for future capacity needs to ensure the system can handle anticipated growth.
- **Conduct periodic load testing** to identify potential performance bottlenecks and optimize system configurations accordingly. Review and adjust process scheduler configurations to ensure efficient batch processing and reporting.
- **Maintain up-to-date documentation** of system configurations, procedures, and customizations to facilitate knowledge transfer and support continuity. Provide regular training sessions for administrators and users to ensure they are equipped with the knowledge and skills to use the system effectively. Develop and deliver training programs to familiarize users with new features and enhancements, maximizing adoption and effectiveness.
- **Regularly review maintenance activities and adjust the plan** based on changing business needs and technological advancements. Establish a cycle of regular reviews and retrospectives to assess the impact of enhancements and identify further opportunities for improvement.

B. Preventive and Perfective Maintenance Schedule

- **Weekly Tasks:** Performance monitoring, log reviews, and backup verification
- **Monthly Tasks:** Database maintenance, security audits, and user access reviews; Collect and analyze user feedback, implement minor UI/UX improvements, and deploy custom reports
- **Quarterly Tasks:** Load testing, patch application, and system health checks; Develop and test new features, optimize workflows, and enhance integrations
- **Annual Tasks:** Version upgrades and disaster recovery testing; Conduct comprehensive system audits, review and update documentation, and provide extensive user training

C. Continuous Improvement

Regularly review system performance and user feedback to identify areas for improvement and implement enhancements that drive efficiency and user satisfaction. Stay abreast of emerging technologies and trends in the ERP software via Support to propose innovative solutions that add value for the Client's organization. Following areas will be under continuous monitoring for improvement.

- Bug fixing (Functional configuration and set up, Updating the functional/technical design document, Development and Testing, and Regression Testing)
- Management of Security Roles and Permission Lists
- Operational questions from super users and/or liaisons
- Ticket Correspondence – response/investigation/resolution
- Application maintenance and availability
- Health checks
- Refreshes
- Patches/bundles/tax updates
- Migrations
- Support ERP Databases with activities like backup, refresh, performance optimization etc.
- Application of patches and updates

D. Incident & Service Request Management

- In our managed services contract, Kastech operates a centralized **Help desk (L1)** providing the “first line of defense” and routing the tickets to skilled professionals (**L2 & L3**) available during business and non-business hours to address user requests and resolve issues.
- Kastech support team ensures prompt communication and support to minimize disruption to business operations. Kastech team promptly acknowledges an incident/service request. Our Managed Services involves formal communication (utilizing the tool – as approved by the client organization) to inform the client about the incident's occurrence, initial impact, and the steps being taken to address it. This communication demonstrates transparency and assures the client that the issue is being actively managed.
- Kastech Team performs detailed **root cause analysis** for recurring issues to identify underlying problems and implement long-term solutions, reducing the likelihood of future incidents.
- Kastech Team also provides an estimated completion time for any service request(s) that require any feature development or configuration involving subject matter experts.
- **Incident/Service Request Priority Definitions:** Support requests that are made to the ticketing tool are prioritized based on the nature, severity and time of the request by the Client’s team/staff. The following priority definitions have been developed to service our ERP clients in the most efficient manner possible.

Priority Level	Priority Definitions
Emergency	<ul style="list-style-type: none">• Supported Production System is down• System anomalies that prevent client from accessing supported Applications• Inability to reach login site of supported Applications• Supported Web Portal site is down

Priority Level	Priority Definitions
	<ul style="list-style-type: none"> Problem or defect causes complete loss of service in Production and no workaround exists Hampers the completion of business-critical tasks during crucial business periods
High	<ul style="list-style-type: none"> Supported Application not functioning normally for critical business processing Incidence of a new Issue that needs immediate attention and is affecting major component(s) of Supported Applications No acceptable workaround, but operations can continue in a restricted fashion
Medium	<ul style="list-style-type: none"> General support requests not affecting broad range of users or supported Applications Incidence of a known issue that has been previously reported Minor loss of service and workaround can be used to restore functionality
Low	<ul style="list-style-type: none"> Comments/suggestions from customers Change Requests The issue does not impact the business and can be deferred to be addressed when time allows

Table 15: Priority Levels and Definitions

- Kastech commits to meet the **Service Level Agreements (SLAs)** as agreed /established with the Client organization for the incidents and service requests for each priority level as defined above.

E. Examples of recent/current similar Engagements:

Client Name	Project Description
San Joaquin County, California	<ul style="list-style-type: none"> The County has been utilizing the on-premises PeopleSoft ERP applications - Financials and Supply Chain Management (FSCM) and Human Capital Management (HCM) systems for over twenty (20) years. Kastech is currently providing the application maintenance and support services.
Pima Community College	<ul style="list-style-type: none"> In July 2023, PIMA engaged Kastech to provide ERP managed services to support existing Ellucian Banner applications and systems. The scope included supporting Banner Student, Banner Admin Pages, and Banner Security. Our team is working on upgrades, patching and integrated applications maintenance. Under Special Projects, new applications are being implemented and post-production support being provided.
Aims Community College	<ul style="list-style-type: none"> In August 2020, Aims engaged Kastech to provide Managed Services for Ellucian Banner Student for a period of two years and ongoing support until they move to a new ERP platform – Workday. Banner

	support services was a subset of the bigger project Data Conversion and Migration (Banner to Workday Student).
Veritone Inc. California	<ul style="list-style-type: none"> Veritone had been using NetSuite as its Finance and HCM applications for many years and decided to move from NetSuite to Oracle Fusion Cloud (Finance) and Workday HCM. Kastech was engaged by Veritone to provide project management services for the implementation of Workday and Oracle Fusion Cloud. Kastech is currently providing managed services for Oracle ERP Fusion Cloud (Finance Application).
Meharry Medical College, Nashville, Tennessee	<ul style="list-style-type: none"> MMC has recently moved from Ellucian Banner to Workday HCM and Finance with Workday Student being underway. Kastech is contracted by MMC to provide managed services for Banner Student Modules and to migrate the data from Ellucian Banner to Workday. The scope of Lights-on support for Ellucian Banner extends to comprehensive technical assistance, ensuring that client receives expert support for the entire spectrum of workday implementation.
CDW Corporation	<ul style="list-style-type: none"> Kastech was engaged to provide PeopleSoft ERP managed services solution for CDW to enhance IT operations, improve service delivery, and optimize overall performance. The initiative involves transitioning from a traditional IT management approach to a comprehensive managed services model, support, and maintenance.
Amerit Fleet Solutions, CA	<ul style="list-style-type: none"> Kastech has provided support services for PeopleSoft HCM 9.2 and FSCM 9.2 using a group of highly skilled and experienced IT personnel. The scope included Fit-gap analysis, retrofitting, architecture, development, configuration, customizations, testing, technical conversion and documentation, and user training.
Tide Water	<ul style="list-style-type: none"> Kastech was engaged to provide Application Managed Services for both PeopleSoft 9.2 HCM & Finance applications and providing L2 & L3 support. The support services also included SQL Server DBA maintenance, Sysadmin, OBIEE, and Hyperion support.

Table 16: Examples of ERP Managed Services

5.1.2 Kastech's Capabilities for Product Category #2

Providing strategic guidance and consulting services to help our customers select an ERP software (based on comprehensive research and comparative study) and an implementation vendor and devising a detailed plan for implementation is a critical task where we work closely with our clients.

Here is a brief account of our capabilities, knowledge and skills relevant to this category:

A. Expertise and Knowledge of leading ERPs:

Our expertise working with majority of leading ERP technologies (across core modules) coupled with **our intimate knowledge of all the viable options in the marketplace** accelerate the process and

provide our clients with a sounding board to think through the implications of change along with the opportunities to transform their current ERP environment.

B. Reusable Templates:

Researching on various viable ERP options with a comprehensive comparative study would need well-defined template(s) that lists the various required as well as desired factors / attributes specific to our clients. We have designed these **templates that can be reused** with necessary changes (specific to the unique needs of an NCTCOG TXShare entity. This saves a lot of time and effort and adds more objectivity to the task and deliverables.

C. Result-Oriented Deliverables:

One of our key deliverables is a **workbook that includes over 1,000 business processes** that commonly occur across a municipality/local government entity's day-to-day operations. If this data is required to be inserted into a future RFP or leveraged to help compare and contrast modern ERP platforms the value is evident. This workbook will expedite many of the activities necessary to create the RFP and in most cases, this workbook meets at least 75% of our clients' needs.

D. Assist with Creation of Realistic Budget(s):

ERP modernization may not only be a time consuming process but also cost-intensive. At Kastech, we have experts who can help our clients create **realistic and comprehensive budgets** as part of the preparation for a new ERP implementation. Our team has been managing the implementation for every major vendor, and we see direct and indirect costs that impact our clients. We will examine software costs, implementation costs, backfill costs, third party applications that can be de-commissioned or may need to remain and even provide insights into potential compensation /retention models to protect our clients' key staff throughout the ERP modernization project.

E. Well Defined Phased Approach:

For such engagements, we have defined a phased approach as depicted below:

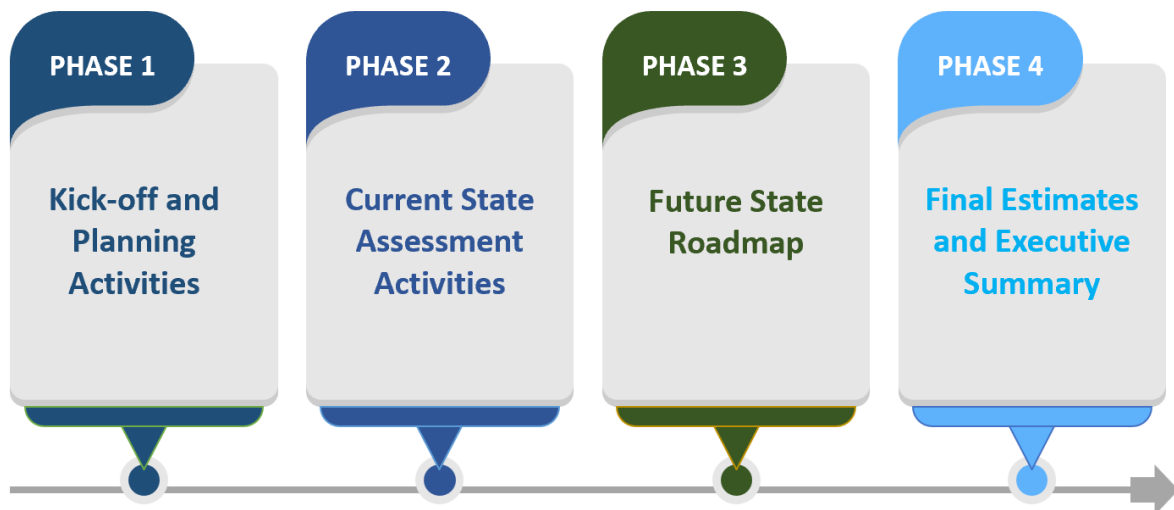


Exhibit 8: Phased Approach for ERP Research and Implementation Preparation

During Phase-1, we work with our clients' core team to get the answers to several fundamental questions and lay the foundation for the remainder of the research, analysis and recommendations. Key aspects that are discussed during this phase include but not limited to:

- Introduce our ERP research team and meet key stakeholders from the clients' side.
- Discuss similar projects including readiness activities, procurement activities, implementation activities, lessons learned.
- Quick discussion about current technology and limitations.
- Who will be reviewing/editing our deliverables?
- Review competing projects and any key dates
- What are the prioritized scope items?
- Review of policies that need to be examined.
- Discuss the Clients' governance structure.
- Analysis of change management across clients' organization.
- Determine how we will conduct the rapid current state assessment before delving into researching the viable ERP options in the market.
- Collaboratively build a workplan for the next phases.

During Phase-2, we will help facilitate focused workshops to gather business requirements associated with this project. It is imperative that current state requirements be combined with future state requirements to **ensure the future technology platform is capable** of meeting the needs of the organization. We recommend breaking this step into five distinct sets of activities:

- Activity 1: Review current ERP applications.
- Activity 2: Interview users of the applications and those impacted by the technology.
- Activity 3: Current state analysis of data governance capabilities.
- Activity 4: Current state analysis of organizational governance.
- Activity 5: ERP modernization project staffing analysis to review the current staffing levels in key areas and proactively identify "leads" and "backups" in each critical area necessary for a successful modern ERP implementation.

As we conduct the current state review and documenting opportunities for our client's future business requirements, we are also conducting analysis of your data model, shadow systems, pain points and opportunities for improvement. The current state analysis should serve as a **kick start to their change management activities**, and to begin to create, inspire and support that culture of change which is critical for the success of any ERP implementation/transition.

We use the data from the current state analysis to help create any future budgets and plans based on our recommended prioritization to help our clients **prepare for any future ERP modernization project**. Another important element of our approach here is that we try to gather as much data as possible with a smaller group and then use our interaction with the larger audience to validate our initial findings and add additional details where applicable. This has proved to be a really effective strategy.

During Phase-3, we compile the data captured in the earlier activities to collaboratively build a roadmap to drive a future set of activities to **prepare our clients for any future ERP modernization project**.

- Define what the future state could look like with the viable ERP options. We will present a comparative study based on key deciding factors.
- Deployment recommendation (phased, concurrent, etc.) along with reasoning for recommendation. This would include Timeline breakdown and sequence for each ERP module, Resource implications associated with this deployment scenario, including implementation partner and backfill implications.
- Include risk, cost, and resource implications related to alternative deployment scenarios for better understanding of the levers and options available.
- Provide preliminary implementation estimates. This includes –
 - Estimate of cloud-based ERP solution costs, including data costs associated with integrations, data analytics, and other cloud cost implications -
 - Provide quotes from leading cloud solutions for informational purposes. Please note that production recommendation and product selection are not part of the scope.
 - Provide guidance on evaluation criteria, inputs and ways to structure an ERP product selection.
 - Estimation of Implementation Partner (IP) costs.
 - Provide cost breakdown of Implementation Partner costs.
 - Provide evaluation criteria and weighting schemes recommendation for selecting an IP.
 - Estimation of Organizational Change Management Engagement
 - Resource forecast and cost estimate - Internal labor requirement (dedicated and partial), augment internal labor, and backfill costs
 - Other implementation costs recommended.
- Future State Roadmap to also include disposition timeline and factors for the legacy ERP.

During Phase-4, we finally summarize the findings and the recommendations from this exercise which provide our clients with actionable data and help them decide on the next steps which could be:

- The client teams can prioritize the improvement opportunities (based on the final report) to create short term scopes of work intended to “stabilize” the current state while they wait for a new ERP implementation to address.
- Create a data governance strategy before selecting a new cloud ERP platform.
- Create an RFI to obtain information related to products and pricing to use for further analysis.
- Create a formal Request for Quote (RFQ) for a new ERP software. If our client desires to issue a formal RFQ for ERP software vendors to submit their estimated costs, we can provide the RFQ document for their procurement department to issue. If the client does not want to issue a formal RFQ, we will take the data we gathered through the analysis and research and work with the various ERP vendors to get the associated costs for software and services.

Please note we have access to the senior leadership at Oracle, Workday, Ellucian and other ERPs.

- Create a project to streamline current state processes to increase operational efficiencies.
- Create a new initiative to delve deeper into current staffing challenges.

F. Example of a similar Engagement:

Jacksonville Transport Authority (JTA) is an independent agency responsible for public transit in the city of Jacksonville, Florida, and roadway infrastructure that connects northeast Florida. In late 2019, Kastech conducted a **three (3) week comprehensive assessments** of their current ERP application (latest release) - Oracle EBS 12.2.8 and the alternative ERP option - Oracle Cloud ERP solutions.

We closely studied the pros and cons for each of them, and came up with a comparative analysis to enable JTA gain more clarity and sound understanding about whether to upgrade their current EBS version (to the latest stable release) or switch over to new ERP - Oracle Cloud ERP for supporting their futuristic roadmap and be at the forefront by keeping up with the prevalent industry trends.

Our recommendation advocating the transition to a new ERP software - Oracle Cloud was presented through numerous rounds of client interactions.

5.1.3 Kastech's Capabilities for Product Category #3

When it comes to replacement of a legacy ERP system and implementation of a new ERP application in its place, Kastech follows a **formal project implementation protocol** that aligns with the industry best practices. These components of an implementation methodology would apply to every ERP implementation.

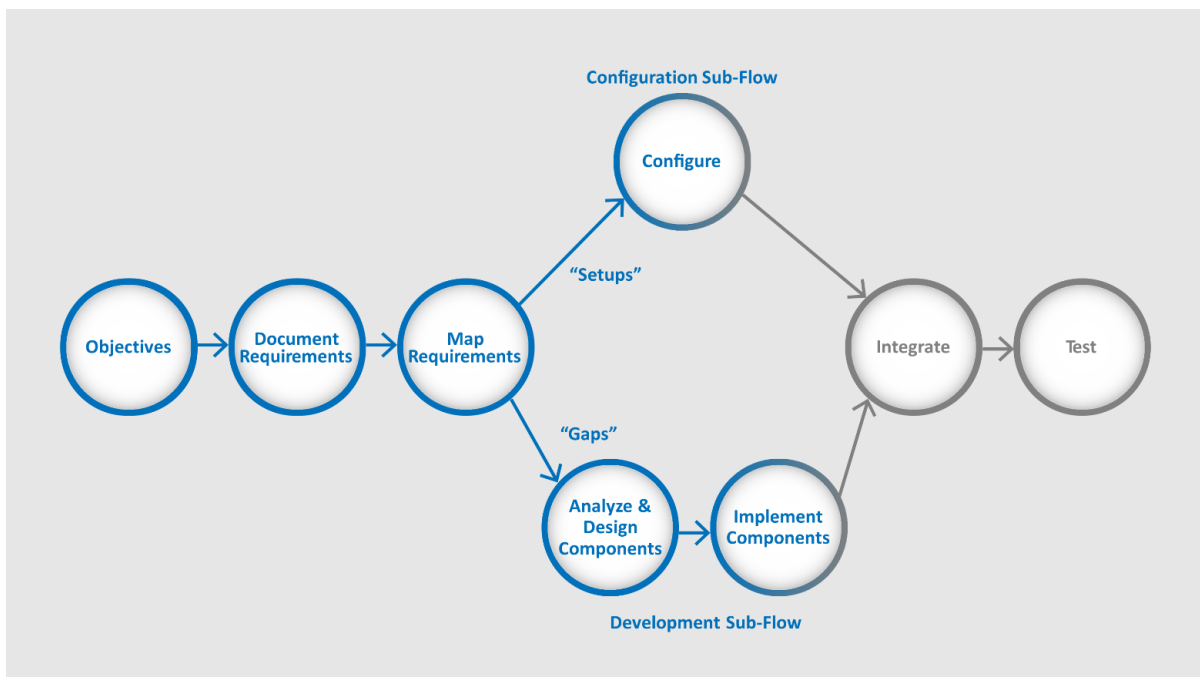


Exhibit 9: Implementation Methodology - Core Components

Kastech has expertise in performing every implementation activity/task and providing the deliverables as per the Project Plan. We also offer certain services as auxiliary services for bigger implementation engagements that involve multiple vendors. These services include data conversion, integration, reporting, change management, and project management.

A. Our Underlying Principles Governing ERP Implementation

Based on our years of experience with leading ERP applications, we believe in few **underlying principles** that define and shape our approach to implementation of enterprise applications:



Exhibit 10: Principles underlying our implementation methodology

- We believe humans need short time horizons and associated milestones to enable them to stay focused on a set of clearly defined objectives. This means breaking up the large chunks of an ERP implementation project into shorter duration chunks would help the project team stay focused and deliver quality.
- Developing a strong definition for the scope of the project using specific artifacts so we know when there has been a change of scope is critical in every implementation engagement. The ability to respond to and embrace change that inevitably happens during the project lifecycle is equally important.
- Quality implementation is a result of progressive refinement wherein early discussions/requirements sessions/iterations deal with the breadth of the system, while later iterations focus on the details.
- Additionally, our project implementation methodology focuses on **continual feedback and interaction** with our clients' project team and key stakeholders to define requirements, issues, or problems. We work collaboratively with our clients' project team to develop project plan, task description, scope, assumptions, risks, completion criteria and estimated level of effort to deliver. We keep project management process simple and manageable, scalable, accountable and auditable.

B. The Five (5) Phases of our ERP Implementation Methodology

Our methodology provides a repeatable, consistent implementation approach that will enable our project team to quickly develop detailed work plans that have been proven to mitigate risks. Our 5-phased implementation methodology takes a process-centric approach, looking at the key business processes and getting maximum utilization from the ERP software.

Phase 1: Strategy and Planning

Purpose: The purpose of this phase is to create the project mission, objectives, performance measures and project plan.

In this phase, we assess our Client's corporate objectives and business goals; develop a framework to understand scope, risks, impacts, measurements and derive a plan to ensure successful ERP implementation in alignment with the Client's business objectives. This encompasses business diagnosis, strategic direction and operating strategy. The main objectives of this phase are to create the project mission, objectives, performance measures and project plan.

Key Activities:

- Project Kick-off meeting
- Project Estimation
- Creating Work Breakdown Structure (WBS)
- Skill Gap Analysis and identifying Training Needs
- Project Management Plan (Risk Management, Configuration Management, Communication protocol) preparation
- Preparing Testing Strategy

Entry Criteria/Inputs:

- Executive Strategic Outline that includes a comprehensive list of scope, objectives, risks and other business drivers.
- Statement of Work (SOW)

Exit Criteria/Outputs:

- Project Kick-off Meeting Notes
- Project Management Plan
- Project Status Report
- Software Release Plan
- Metrics Plan
- Requirement Traceability Matrix (RTM)
- Risk Tracker
- WBS Estimates
- Configuration Management Plan
- Instance strategy
- Testing strategy
- Backup and Recovery strategy (Data and Hardware)

Process Assets/References:

- Project kick-Off meeting Presentation
- Project Management Plan
- Requirement Traceability Matrix (RTM)
- Software Release Plan
- Metrics Plan
- Issue log/Clarification Log
- Instance Strategy
- Testing Strategy
- Backup and Recovery Strategy

Measurements/Metrics:

- Planned / Revised start and end dates for the Release / Project
- Planned / Revised effort for the Release / Project
- Total effort allocated for the Release / Project
- Estimated / Revised Size of the Project / Release

Table 17: Phase 1 - ERP Implementation Methodology

Phase 2: Analysis and Design

Purpose: The purpose of this phase is to -

- Identify the requirements with-in the scope of the chosen ERP software application
- Identify the detailed gaps between “As-is” and “To-be” processes
- Analysis and design for interface and conversion processes, reporting functionality, change management, infrastructure management and training components that are required to support the implementation.

Key Activities:

- Requirements gathering
- Fit-gap analysis
- Creating Business requirements document (BRD)
- Creating Initial Requirements Traceability Matrix (RTM) document
- Identify the final scope of the Application
- Designing Functional and Technical design documents for requirements within the scope
- Creating Data interface and Data Conversion document for the ERP application

Entry Criteria/Inputs:

- Complete Project plan with key timelines, milestones and defined deliverables
- Comprehensive list of scope, objectives and Business Processes
- Backup and Recovery Strategy
- Risk tracker

Exit Criteria/Outputs:

- Completed Fit-gap Analysis
- Defined Training components for Project team
- Completed Requirements Summary sheet
- High Level Design and Low Level Design documents
- Data conversion and validation document
- Issue/Clarification log summary

Process Assets/References:

- Fit-gap Analysis report
- Requirements Summary sheet
- Requirement Traceability Matrix (RTM) document
- Software Requirement Specifications (SRS)
- High Level Design document
- Low Level Design document
- Data Conversion and Validation document
- Project Management Plan including change management

Measurements/Metrics:

- Planned / Revised start and end dates for Fit-gap Analysis

- Planned / Revised effort for gathering requirements
- Total effort allocated for Analysis & Design phase (Functional and Technical)
- Estimated / Revised Team Size Analysis and Design Phase

Table 18: Phase 2 - ERP Implementation Methodology

Phase 3: Configuration and Development

Purpose: The purpose of this phase is to configure and build the proposed ERP system.

Key Activities:

- Revising Design documents (High Level and Low Level) for all requirements
- Application configuration
- Perform coding for the features that require customizations, integration with third-party systems and interfaces
- Unit testing and test cases
- Preparation of Software Test Plan

Entry Criteria/Inputs:

- Revised Requirements Summary sheet
- SRS for requirements within the revised scope of the Project
- High Level and Low Level design documents for all requirements
- Hardware and Software specifications for configuration of Application
- Instance, Backup and Recovery strategies

Exit Criteria/Outputs:

- Revised High Level Design Documents and Low Level Design Documents
- Configuration Management Plan
- Configuration Audit Check List
- Coded custom features
- Impact Analysis Document
- Test Cases (with Unit Test results)
- Migration Report
- Project Issue Log
- Initial Software Test Plan

Process Assets/References:

- High Level Design Documents
- Configuration Management Plan
- Low Level Design Documents
- Change Request
- Project Migration Request (PMR) form
- Test Cases
- Software Test Plan

Table 19: Phase 3 - ERP Implementation Methodology

Phase 4: Testing and System Validation

<p>Purpose: The purpose of this phase is to Test the complete application including all interfaces and data validation.</p>
<p>Key Activities:</p> <ul style="list-style-type: none"> • Build and Execute Test Cases (System and Integration, Performance, Regression and UAT) • Defect tracking and Bug-fixing • Develop end-user training aids and materials
<p>Entry Criteria/Inputs:</p> <ul style="list-style-type: none"> • Requirement Summary Sheet • Revised High Level Design and Low Level Design Documents • Test Case (with Unit Test Results) • Software Test Plans (System and Integration, Performance, regression and UAT)
<p>Exit Criteria/Outputs:</p> <ul style="list-style-type: none"> • Test Cases (System and Integration, Performance, regression and UAT) • Revised Software Test Plan • Project Issue Log • Defect Log • Impact Analysis Document • End User Job Aids • Go-live cut over Plan
<p>Process Assets / References :</p> <ul style="list-style-type: none"> • Test Cases • Software Test Plans • Project Issue Log • Change request • Impact Analysis • Project Migration Request (PMR) form • Requirement Traceability Matrix (RTM)

Table 20: Phase 4 - ERP Implementation Methodology

Phase 5: Production Deployment and Critical Care/Support

<p>Purpose: The purpose of this phase is to deploy the application into the production and support the environment till the application is stable as per the agreed Critical care period in the SOW.</p> <p>We also create application support approach and service level agreements (SLAs) to set and manage end-user expectations. The goal of this phase is to achieve the desired performance targets in an optimal time frame and to create an environment in which continuous improvement is sustained. It includes application management, operations and ongoing performance support.</p>
<p>Key Activities:</p>

<ul style="list-style-type: none"> • Go-Live • Critical care support (typically for 2 weeks) to steady-state operations • Knowledge transfer to Internal/external Production Support Team • Training the internal/external Production Support Team • Create baseline Service Level Agreements (SLA) for ongoing support functions (Applicable only for Projects with Ongoing Support on request.
Entry Criteria/Inputs: <ul style="list-style-type: none"> • Go-live Cutover plan • Production database instance ready • Fully tested Environments • End User Job Aids
Exit Criteria/Outputs: <ul style="list-style-type: none"> • Completed Cutover plan • Fully tested Production environment • Client sign-off • Customer Feedback • Training Feedback Form • Baseline Service Level Agreements (SLA) for ongoing support functions
Process Assets/References: <ul style="list-style-type: none"> • Go-Live Cutover plan • Baseline SLA's document • Configuration management Plan • Project Migration Request (PMR) form • Migration tracker • Knowledge Transition • Training Materials; recorded training sessions; training feedback

Table 21: Phase 5 - ERP Implementation Methodology

In conclusion, our implementation methodology is clearly defined, time tested and effective. Additionally, our methodology is woven by strong Project Management, Risk Management, Quality Management and Technology Enablement processes. These support functions provide the continuous guidance needed to keep the overall initiative on track to deliver value. The key to successful implementations depend on leveraging these proven strategies around Risk, Quality and Technology.

C. Few Examples of ERP Implementation

Client Name	Project Description
Washington State Board for Community and Technical Colleges (SBCTC)	<ul style="list-style-type: none"> • Implementation of Oracle PeopleSoft ERP (v9.2) applications (HCM, FSCM and Student Information System) • Implementation of PeopleSoft ELM v9.2
City of Santa Clara	<ul style="list-style-type: none"> • Oracle PeopleSoft 9.2 Asset Management Implementation • Oracle PeopleSoft 9.2 Billing and Accounts Receivable Implementation

Florida State College Jacksonville (FSCJ)	<ul style="list-style-type: none"> • Implementation of PeopleSoft Campus Solutions 9.2; implementation of Campus mobile app using Oracle MCS • Upgrade of PeopleSoft HCM and FSCM to v9.2
Kings County, California	<ul style="list-style-type: none"> • Kastech was engaged for the following: <ul style="list-style-type: none"> ○ Employee Self-Service (ESS), Manager Self-Service (MSS), Time and Labor modules implementation ○ PeopleSoft Security Administration ○ ELM 9.2 implementation
New York University	<ul style="list-style-type: none"> • Kastech provided IT consultants and staff for PeopleSoft Finance 9.2 Travel and Expense module Implementation.

Table 22: Examples of ERP implementation

5.1.4 Kastech's Capabilities for Product Category #4

Kastech has been providing standalone assessment, review and documentation services for several clients who have been looking for improvements in their current business processes, identify and build effective integrations, and/or intend to transition to a new ERP application that addresses their current pain points.

Some of the key elements of our approach to such review and assessment services are described below:

A. Flexible Engagement Model

We understand that every client is unique and so are its business processes. So, it is important that our approach to these types of engagements meets most of the anticipated requirements of our clients. This is the reason why we have an approach that is highly flexible.

We align our analysis with our client's strategic principles, strategic goals and prioritized objectives as outlined in their organizational strategic plan. Our approach will document this valuable information and **personalize each step of the process and all associated deliverables** to allow us to demonstrate to those stakeholders we heard them and that their pain points and wish lists are continually being evaluated as part of the modernization analysis. Our methodology is task and deliverable based and our resources will **personalize a delivery model** that meets our client's leadership team's exact business requirements.

B. Team and Timelines

The core aspect of our approach is to engage the "Right Team" with the "Right Experience" equipped with the "Proven Tools & Methodologies" to provide an honest and independent appraisal of the existing business processes, process workflows, integrations etc, and deliver a realistic strategic roadmap for improvements.

The assessment team typically consists of 2 to 4 subject matter experts (SMEs). Kastech assigns a lead who works with the assigned Client liaison to facilitate the engagement meetings. Typically, such assessments can take anywhere between four (4) weeks to twelve (12) weeks based on the scope of the business processes involved.

C. Key Activities and Deliverables

Our standalone assessment, review and documentation services typically includes the following key activities and deliverables:

Phases/Steps	Proposed Activities & Deliverables
Kick off & Legwork	<p>Activities:</p> <ul style="list-style-type: none"> • Introduction of the Kastech Assessment Team and Kick-off (typically with the Client's leadership, generally the cabinet) • Gathering of required documents, work out logistics for onsite surveys/interviews • Gathering of different reliable sources of information on ERP market landscape, offerings, advancements over the next 10 years <p>Deliverables:</p> <ul style="list-style-type: none"> • Detailed project plan with schedules for interviews and focus groups • Final list of participants for interviews and focus groups – roster of personnel to interview
Interviews	<p>Activities:</p> <ul style="list-style-type: none"> • Interview key stakeholders, decision makers, and IT staff from the Client's organization • Interviews are typically thirty (30) minutes to an hour. Typical assessment involves about forty (40) to sixty (60) interviews for a City/County. <p>Deliverables:</p> <ul style="list-style-type: none"> • Interview attendance sheet(s) • Interview notes to be analyzed for development of the written report
Focus Groups	<p>Activities:</p> <ul style="list-style-type: none"> • Conduct three (3) to Four (4) Focus Groups (involving Staff from different departments and divisions; this is where we rely on our clients to recommend the specific departments and divisions) <p>Deliverables:</p> <ul style="list-style-type: none"> • Attendance Sheet(s) • Discussion notes to be analyzed for development of the written report
Analysis	<p>Activities:</p> <ul style="list-style-type: none"> • Perform detailed data review and analysis • Preliminary trends identified will be shared with the Client's leadership team <p>Deliverables:</p> <ul style="list-style-type: none"> • Analysis notes • List of questions for further clarifications

Phases/Steps	Proposed Activities & Deliverables
Report Development	<p>Activities:</p> <ul style="list-style-type: none"> • Prepare draft report • Conduct any required follow-up interviews/discussions for clarifications • Strategic roadmap development with the executive sponsorship and IT leadership <p>Deliverables:</p> <ul style="list-style-type: none"> • Draft written report
Review with the Client	<p>Activities:</p> <ul style="list-style-type: none"> • Share draft with the Client's Executive Sponsor/Stakeholder(s) and seek feedback <p>Deliverables:</p> <ul style="list-style-type: none"> • Acknowledgement note with "to-do" comments on Client's feedback
Final Report	<p>Activities:</p> <ul style="list-style-type: none"> • Prepare the final report <p>Deliverables:</p> <ul style="list-style-type: none"> • Final Written Report including (at minimum) <ul style="list-style-type: none"> ○ Executive Summary ○ Current State Process and System Usage ○ Challenges and Pain Points ○ Future State Process and Recommendations ○ Proposed Projects, Dependencies and Timeline (Roadmap) ○ Conclusion • The multi-year strategic roadmap including Quick Wins, Short, Medium and Long-term opportunities and improvement plans can also be shared based on the specific needs of the client and the scope of this engagement.
Presentation to the Client leadership team and Stakeholders	<p>Activities:</p> <ul style="list-style-type: none"> • Present the final report to the client for sign-off • Respond to any questions and queries related to the report • If required, plan for next steps. <p>Deliverables:</p> <ul style="list-style-type: none"> • Signed-off Final Report

Table 23: Key Activities and Deliverables for Standalone Assessment Services

D. Areas of Focus

Standalone review and assessment of current business processes, workflows and integrations involve several key areas as described below:

- **Gain thorough understanding of the current state:** Kastech assessment team interviews the administrative support teams for different business modules (supported by the ERP

application in use and the third-party integrations). The purpose of these interviews is to document how they manage their platforms, how the users utilize the different applications, obtain an understanding of which areas are and are not customized, review issues and document opportunities to improve. These meetings help Kastech **identify specific areas we want to delve into** with the respective business users from different departments/divisions/offices. Work with the users of the system and interview anyone touched by the software and/or processes.

- **Understand the nature and extent of Customizations:** We would prefer to have an updated “compare report” that **identifies all of the customizations** to each application, if possible. Customizations to the legacy ERP application/platform must be documented with details pertaining to why they were created, who approved and what problems the customizations solve. This data will be used in several areas later to ensure any enhancements and/or new platform can meet the needs of the business and the team will have an inventory of topics to **conduct “impact analysis”** tasks to ensure stakeholders know how their current state will change if the customization goes away or looks different.
- **Deep-dive with Focus Groups:** We facilitate focused workshops to gather details on the core business processes. We document the pain points, business requirements and opportunities to improve from each focus group. This data is used in multiple places including business process re-engineering and prepping vendors to personalize ERP software demos in case our client is looking for transitioning to a new ERP system. This data also helps to identify specific elements we want our client’s team to TEST DRIVE in any new software or enhanced feature. This way they can see how their pain points could be alleviated by the new platform or an enhanced feature.
- **Identify challenges:** Identify challenges in the knowledge, training, use, efficiency, and overall governance of the current ERP system. Identify the challenges such as lack of efficiency due to too much of manual work/intervention and little automation. Identify examples where users aren’t properly utilizing the delivered system. Identify examples where recommended processes may NOT be followed properly.

E. Examples of Similar Engagements

Client Name	Project Description
Pima Community College	<ul style="list-style-type: none"> • In May 2022, PIMA engaged Kastech to perform an overall Banner ERP assessment with a deep-dive and recommend the college with best-practices and Banner solutions. The engagement involved comprehensive Banner ERP IT assessment to provide a technical deep dive into Banner servers, applications and third-party integrations.
City of Santa Clara	Purchasing System Improvements: <ul style="list-style-type: none"> • Kastech conducted a detailed analysis of the City’s current business structure and provide recommendations for improving

	<p>the use of PeopleSoft FSCM 9.2 Purchasing (“PeopleSoft Purchasing”).</p> <ul style="list-style-type: none"> Review integrations with other PeopleSoft applications including: <ul style="list-style-type: none"> PeopleSoft Asset Management PeopleSoft eProcurement PeopleSoft General Ledger including Commitment Control PeopleSoft Inventory PeopleSoft Payables PeopleSoft Strategic Sourcing PeopleSoft Supplier Contract Management
California State University, Stanislaus	<ul style="list-style-type: none"> California State University, Stanislaus engaged Kastech to perform a detailed assessment for rapid digital transformation. Comprehensive assessment of identifying the gaps, pain points and deploying rapid digital solutions for Digital Transformation of the Campus that comes with managed services support, break/fix & enhancements delivered and managed using RPA (Robotic Process Automation) & OCR (Optical Character Recognition) software licenses and Cloud Infrastructure.
Ohio State University (OSU)	<ul style="list-style-type: none"> We performed an independent assessment/review of AWS v/s Oracle Cloud Infrastructure for hosting the University’s ERP applications. Kastech had recommended AWS as the cloud hosted infrastructure for cost efficiency.

Table 24: Examples of Standalone Review and Documentation Services

5.1.5 Kastech’s Capabilities for Product Category #5

Upgrading ERP software is a mandatory part of meeting maintenance requirements. It also allows organizations to take advantage of new features, functionality and the opportunity to retire from outdated processes and customization. It is a complicated process which combines the need to evaluate previously developed customizations, introduction of new enhancements and features which may be desirable to implement and business process changes that will ultimately affect the daily activities of end-users of the system. The key to a **successful upgrade project is the establishment and adherence to a proven methodology**, led by strong project management.

The next few sections describe our capabilities and methodologies for **ERP upgrades**:

A. Fit-Gap Analysis

An important aspect of an ERP upgrade project is a detailed fit gap analysis. Our ERP subject matter experts assist the Client by updating them with changing features, functionality, implementation methods and possible influence on existing customizations.

Our consultants work closely with the Client’s team and analyze all activities from the Business Process perspective, and focus on how the upgrade may impact those business processes and their users, and transfer information about every step in the process as explained below:

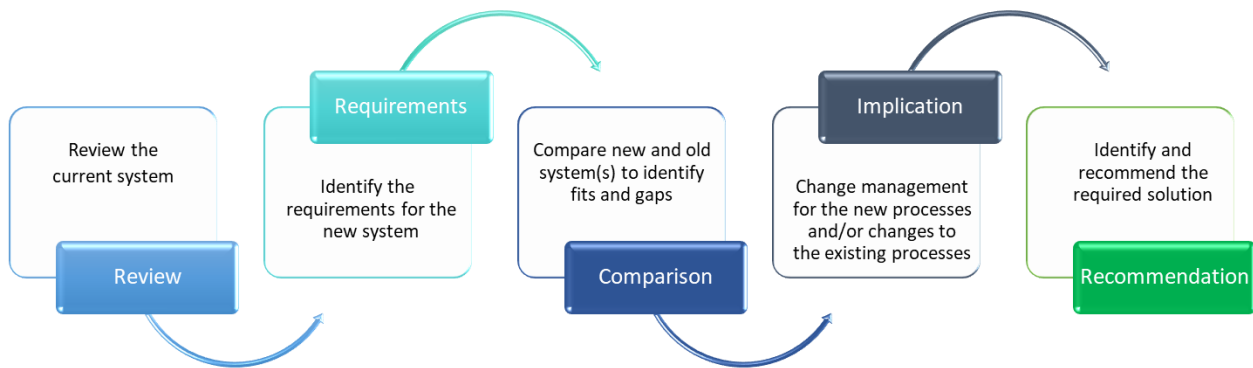


Exhibit 11: Fit Gap Analysis for Upgrades

- **Review:** Kastech team will understand the key business processes and customizations currently implemented at the Client's organization. This will help the team to appreciate and understand the process, features or system currently in place.
- **Requirements:** Kastech team will use the **Conference Room Demo** method of identifying all the key requirements by demonstrating the features of the upgraded version of the deployed ERP software application. This will help the key stakeholders visualize all the new features and processes delivered as part of ERP Upgrade.
- **Comparison:** Kastech team will map all the requirements with what the ERP system delivers and identify the fits and gaps. The team will also map the differences between the current systems that are being used by the Client and the upgraded version and features so that we can identify all the key impacts to the existing processes.
- **Implication:** Kastech team will identify a need for **Change Management** if any key process would undergo a change.
- **Recommendation:** This is the final stage of the process where a complete and detailed Fit/Gap analysis document will be submitted to the Client for their review and approval. This document will include the solution for handling all the Gaps.

B. ERP Upgrade – A Phased Approach

Kastech uses a five-phased approach, breaking this large, complicated process into manageable phases.

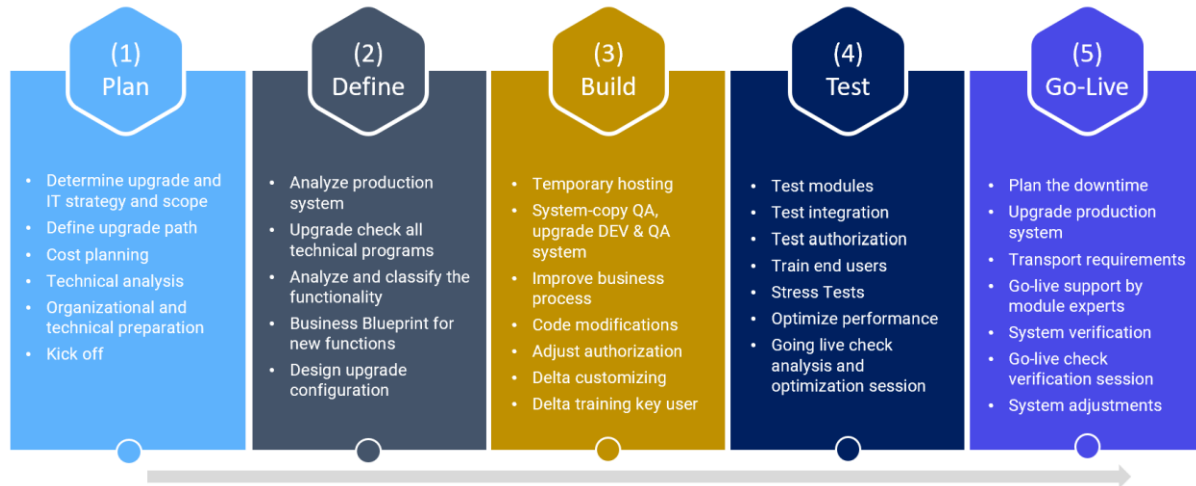


Exhibit 12: ERP Upgrade Project Phases

The Define, Build and Test phases rarely occur in strict sequence without some return to prioritizing tasks. Kastech's philosophy is that these project stages are iterative in nature; as progress is made through the project, further analysis of requirement or redesign of a process may be required due to a change in another part of the system. Additional testing may also need to be performed due to modifications incorporated into the project, but not included in the initial project plan.

A detailed description of the phases with associated tasks and deliverables is provided in the following table:

Phase / Task	Expected Deliverable(s)
Phase 1: Plan – During this project phase, the baseline project plan and engagement rules are defined.	
Develop a Project Plan – Develop the initial list of tasks and schedule for managing the Upgrade Project. The project plan is finalized upon completion of any new functionality or customizations reviews.	<ul style="list-style-type: none"> Baseline Project Plan
Establish Project Charter – Define the strategies associated with managing the Upgrade project. This includes the scope definition, issue tracking, escalation management and resolution.	<ul style="list-style-type: none"> Communication Strategy Change Management Strategy Status Report Template Issues Tracking Template Process Decisions Change Control Strategy
Phase 2: Define – This phase involves the effort associated with defining the existing environment and mapping it to the “to be” environment. Featured activities are those associated with fit-gap and prototyping.	
Audit Current Infrastructure – Explore the current environment, including, but not limited to, servers, operating system, RDBMS and workstations, followed up with recommendations.	<ul style="list-style-type: none"> Infrastructure Audit Report
Review Updates and Fixes – Review the published ERP software Upgrade updates and fixes; make recommendations for implementation and installation.	<ul style="list-style-type: none"> Patch Matrix/Log

Phase / Task	Expected Deliverable(s)
Document Customizations – Create a detailed upgrade and customization matrix for future reference.	<ul style="list-style-type: none"> Customization Log
Perform Fit-Gap Analysis – Analyze or set up and run various processes reflecting the Client’s current business environment to determine which functions should be added to meet the Client’s requirements and the scope of the upgrade.	<ul style="list-style-type: none"> Functionality Matrix Fit-Gap Report
Review and define Strategy Documents – Review and define strategy documents based on business process requirements.	<ul style="list-style-type: none"> Training Strategy Report / Information Access Strategy Report Distribution / Printing Strategy Production Support / Help Desk Strategy Testing Strategy
Phase 3: Build – This phase features activities that will build the initial environment and create the move to production processes.	
Configure Infrastructure – Assist the internal Network Administrator, System Administrator and Database Administrators with the setup and configuration of the hardware and software within the Client’s network infrastructure, evaluating and improving system and network performance over the course of several weeks.	<ul style="list-style-type: none"> Customized Infrastructure
Complete Initial Conversion – Execute all upgrade tasks outlined by the ERP software vendor, as well as those identified by Kastech. These steps include, for example in case of a PeopleSoft ERP upgrade, freezing PeopleTools, creating copies of the PROD environment, updating PeopleTools, converting data to the new physical structure, running altering scripts and creating indexes and views.	<ul style="list-style-type: none"> Initial Conversion database Conversion Upgrade Scripts Conversion/Go-live Task Report
Install Databases –Complete the initial installation of the ERP software.	<ul style="list-style-type: none"> Demo, Development, Conversion and Test ERP Environments
Apply Updates and Fixes – Apply specific patches as needed.	<ul style="list-style-type: none"> Patch Directory Structure
Document the Move to Production Process –Document the ‘test move’ and ‘move to the production’ process, ensuring a smooth go-live.	<ul style="list-style-type: none"> Conversion/Go-live Task Report
Re-apply Online Customizations – Kastech manually retrofits customizations for menus, panels (pages), records, fields, process scheduler definitions and application engine programs.	<ul style="list-style-type: none"> Retrofit Projects Upgrade Status Tracking Matrix
Upgrade Complex Reporting and Interfaces – Modify interfaces, complex SQRs, and Reports.	<ul style="list-style-type: none"> Reports and Interfaces Upgrade Status Tracking Matrix
Upgrade Minor Reporting, and Query – Upgrade related modifications for Reports and queries are completed.	<ul style="list-style-type: none"> Minor Reports and Queries Upgrade Status Tracking Matrix

Phase / Task	Expected Deliverable(s)
Create Test Scripts - Develop scripts necessary to test the required critical functionality and processes identified by the test plan.	<ul style="list-style-type: none"> • Test Plan
Apply New Security – Create a security matrix and apply database security.	<ul style="list-style-type: none"> • Permission List Matrix • Roles Matrix • Profile Matrix
Phase 4: Test – This phase features the process of validating the upgraded application and final user acceptance.	
Test ‘Move to Production’ – Run the customized upgrade scripts against copies of the production database for tuning, testing and timing purposes.	<ul style="list-style-type: none"> • Test Move Database • Conversion/Go-live Task Report
Performance Tune the Database – Analyze and tune the operating system, database, servers, network, web services and the ERP application.	<ul style="list-style-type: none"> • Tuning Analysis and Modification
Update Procedures – Update business process documentation with the new version information.	<ul style="list-style-type: none"> • Updated Procedures
Perform Regression, System Integration Testing - Test functionality of each module and various customizations, reports and interfaces. This testing is component testing and focused on the application’s ability to run successfully.	<ul style="list-style-type: none"> • Functionality test reports • Integration Test Results Report
Support User Acceptance Testing – Support end-users during their testing of mock cycles. Test seeks to gain end-user acceptance of the new system and its functions.	<ul style="list-style-type: none"> • User Acceptance Test Result Reports • Issues Log
Deliver End-User Training – Provide delta and train-the-trainer training building upon the Training Strategy developed earlier in the project and Training Manual is created.	<ul style="list-style-type: none"> • Training Manual
Phase 5: Go-Live – This phase focuses on tasks that must take place at the time to go-live and shortly thereafter.	
Complete “Move to Production” – Make the copy of production after testing at a point in time of minimum activity, run the final upgrade scripts and migrate all data to the new system.	<ul style="list-style-type: none"> • Task Go-Live Plan • Production “PROD” environment
Provide Post-Production Support – Provide a period of continued support to address questions and issues during the transition period.	<ul style="list-style-type: none"> • Issues/Action Log

Table 25: ERP Upgrade Project - Tasks and Deliverables

C. On-Premise to Cloud Migration

Our methodology and approach for migrating on-premise ERP applications to cloud platforms/cloud-based solutions include the following:



Exhibit 13: Phases in ERP Cloud Migration Engagements

Each of these phases is explained below:

Phase 1: Create/List Inventory
<ul style="list-style-type: none">• Conduct workshop to create the inventory of existing architecture including Users, Applications, Infrastructure, Security & Privacy, and Service Management.
Phase 2: Application Mapping
<ul style="list-style-type: none">• Map applications.• Conduct a suitability analysis, identifying appropriate service models (e.g., Infrastructure as a Service (IaaS) and deployment models (e.g., public).• Provide recommendations for a specific cloud service model.
Phase 3: Migration Planning
<ul style="list-style-type: none">• Provide migration planning, including developing a multi-step migration roadmap.• Design/provide the environment for testing cloud applications or services.
Phase 4: Migration Execution
<ul style="list-style-type: none">• Migrate applications or services to the chosen cloud platform.• Implement the execution of a multi-step roadmap of cloud migration for the suite of applications or services – which may also include collaboration/integration with various cloud service providers.
Phase 5: Decommissioning (Optional)
<ul style="list-style-type: none">• Planning and management of decommissioning services and applications<ul style="list-style-type: none">○ Revalidate that no dependencies on systems remain active.○ Identify requirements for service cessation resulting in a final release of related resources.○ Identify requirements for termination of support contracts for targeted services and applications.• Planning and management of disposition of data center assets.<ul style="list-style-type: none">○ Develop a plan for the disposition of IT hardware including servers, networking equipment, power supplies, racks, and cabling.○ Identify requirements for termination of related software licenses and maintenance contracts.• Planning and management of disposition of facilities.

- Develop a plan/report for the disposition of facility hardware such as UPS, HVAC, power conditioners and security systems.
- Identify requirements for the termination of utilities, data circuits, service contracts, and operation and/or maintenance contracts for both the facility and the facility hardware.
- Identify requirements for terminating data center leases.
- Recommend requirements for the restoration of facility to “turn-in” condition.

Table 26: Methodology Phases - Description

Kastech’s data migration approach:

Kastech will work in close collaboration with the NCTCOG TXShare entity’s staff for data migration strategy, validation and execution. Kastech will provide a comprehensive workbook for the data migration process, including procedures, mappings, and validation steps.

Our proposed data migration approach includes several key steps:

- **Define goals:** Clearly define the goals of the data migration process. This could include ensuring data accuracy, completeness, and minimizing downtime. Identify the specific ERP modules and data entities that will be migrated, such as Core HR, Benefits, Payroll, etc.
- **Inventory of existing data:** Conduct a thorough inventory of the existing data, identifying the quality, structure, and volume of data to be migrated. The NCTCOG TXShare entity will need to assign a team to help cleanse and standardize data to ensure accuracy and consistency.
- **Data mapping:** Map fields from the source system to the corresponding objects in target ERP Cloud system and define any necessary data transformation rules to align with the target ERP system data structures.
- **Data extraction:** Extract data from the legacy system and verify data integrity during extraction and identify any issues that may impact migration.
- **Data conversion:** Convert data formats as required by the target ERP Cloud system and enhance data as needed, adding missing information or updating outdated records.
- **Data loading:** Load transformed data using tools/loaders for further validation and testing. Perform data integrity checks to ensure accuracy and completeness. Use the target ERP Cloud system/platform’s data loading tools for bulk data migration. For ongoing data changes during the migration period, perform incremental data loads.
- **Testing:** Conduct unit tests to ensure the accuracy of migrated data within the staging area. Reconcile data between the source system, staging area, and the target ERP Cloud system to ensure consistency.
- **Validation:** Verify the accuracy of data in the target ERP Cloud system using reports and validation tools. Involve end-users in UAT to validate that the migrated data meets business requirements.
- **Cutover plan:** Develop a cutover plan detailing the timing, sequence, and activities for transitioning from the legacy on-premise ERP system to the new ERP Cloud and establish backup and rollback procedures in case issues arise during cutover.
- **Post Cutover Validation:** Validate data in the new ERP Cloud system post-cutover to ensure ongoing accuracy. Develop a strategy for archiving and managing historical data not migrated to the new Cloud ERP.

The following image provides a visual representation of Kastech’s data migration approach in a scenario of migrating from on-premise Oracle PeopleSoft ERP (HCM) application to Oracle ERP Cloud (Fusion):

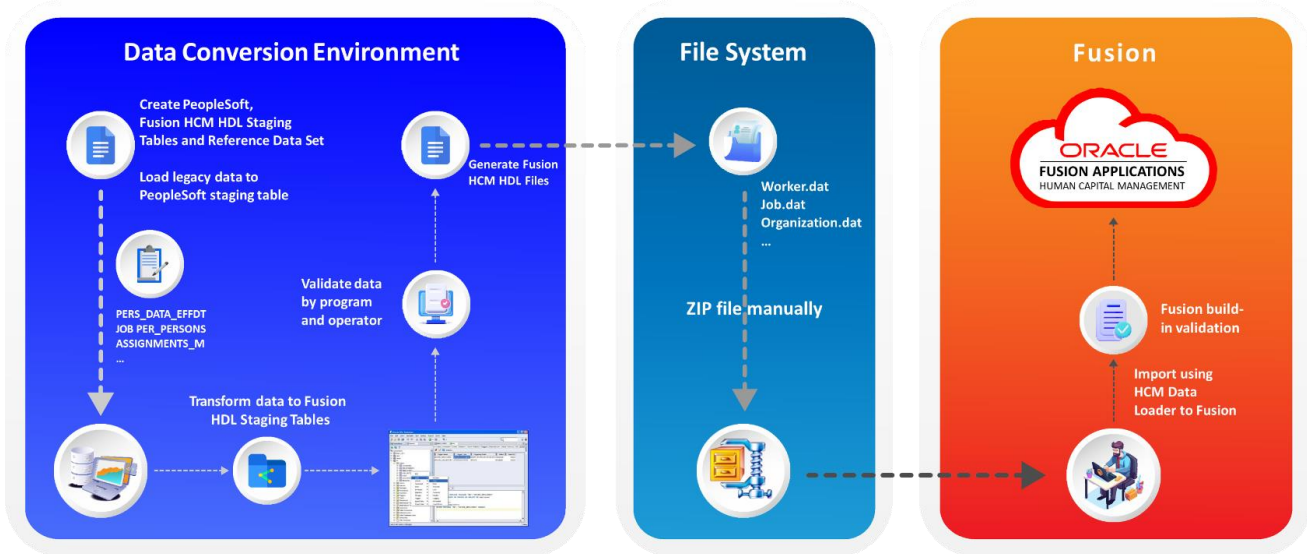


Exhibit 14: PeopleSoft-Oracle Cloud HDL Accelerator

D. Examples of Similar Engagements

Client Name	Project Description
Kings County, California	<ul style="list-style-type: none"> Kastech was engaged by the County for PeopleSoft HCM Upgrade from v9.0 to v9.2.
Ohio State University	<ul style="list-style-type: none"> OSU engaged Kastech to perform an upgrade and hosting to their current PeopleSoft Campus Solutions v9.0 Software. The goal was to execute a technical upgrade to PeopleSoft Campus Solutions version 9.2 in an expedited manner. With this upgrade, the latest PUM from Oracle was to be installed. Kastech used its own hardware and infrastructure to perform the upgrade via a cloud IAAS or other means that will not require processing on OSU’s hardware until the user acceptance test phase. Once the software is upgraded and successfully unit tested, the software be loaded to OSU’s on-prem hardware for further testing. Kastech has been working with OSU through all phases and will assist with any troubleshooting once installed at OSU.
Amerit Fleet Solutions, California	<ul style="list-style-type: none"> PeopleSoft HCM Application Upgrade from version 9.0 to 9.2 Kastech was also involved in migrating data from multiple and disparate legacy systems (such as TMW, Mainframe and homegrown applications) to Oracle PeopleSoft HCM and Finance applications on AWS cloud using proven ETL tools and methodologies. The project involved migration in multiple phases.

Entergy Corporation, Louisiana	<ul style="list-style-type: none"> PUM upgrades for PeopleSoft HCM and FSCM; Assessment of PS TLAM 9.2 Upgrade; Design Foundation of upgrade to PeopleSoft TLAM (Time and Labor and Asset Management) version 9.2
Lonestar College	<ul style="list-style-type: none"> PeopleSoft Campus Solutions upgrade from v9.0 to v9.2
Florida State College Jacksonville (FSCJ)	<ul style="list-style-type: none"> Upgrade of PeopleSoft HCM and FSCM from v9.0 to v9.2
Veritone Inc	<ul style="list-style-type: none"> Kastech is currently engaged to move Veritone from their legacy ERP financial software to Oracle Cloud Applications.

Table 27: Examples of ERP Upgrade/Cloud Migration Projects

5.1.6 Kastech's Capabilities for Product Category #6

In this category, we would like to propose our ancillary products and services that are designed for ERP projects and can be offered on a standalone, as-needed basis. All these services are offered using onsite, remote, full-time or part-time models, whatever works best for our clients.

We have outlined our capabilities for this category below:

A. Data Conversion

While moving from a legacy ERP system to a new ERP platform, data conversion/migration is one of the most critical tasks that require a well-defined plan and checkpoints for a successful transition. Kastech has helped several organizations in this journey. For instance, **Aims Community College** engaged us for **Data Conversion and Migration services** as they were moving from **Ellucian Banner to Workday Student**). Similarly, Kastech was engaged by **Amerit Fleet** to migrate data **from multiple and disparate legacy systems** (such as TMW, Mainframe and homegrown applications) to **Oracle PeopleSoft HCM and Finance applications on AWS cloud** using proven ETL tools and methodologies. The project involved migration in multiple phases.

We leverage our in-house tool – **SimpliData** for data conversion services. Please refer to our response to **Question #7 in Section 5.5 -Response to Organizational Operations** of this document to get an overview of SimpliData.

Kastech will provide a **comprehensive workbook for the data migration process**, including procedures, mappings, and validation steps. Our proposed data migration approach includes several key steps as described in Section 5.1.5.

Typically, Kastech **shares the data loader templates**. It is Client's responsibility to revert with data as per those template instructions. Kastech supports loading these templates and share the error report for those entries that failed during the load process. Loaded data is available for user validation on the Test environment. It is important to note that **data extracts from the legacy system may need to be compiled multiple times for the test and production load**. As needed, the Client Team will be responsible for data clean-up for each extract and also for cleanup of any open transactions to cancel/close prior to their Go-Live. Lack of cleanup will have downstream effects and cause additional effort for reconciliation and clean up support.

B. Integration

ERP applications do not work in standalone mode. For every organization, an ERP application is required to **integrate seamlessly with multiple data sources and third-party applications** to ensure smooth business operations.

Kastech helps organizations to achieve these integrations in an effective manner. We have years of experience in integrating ERP applications with a wide range of databases, applications and data sources with the help of **robust connectors and APIs**. We have our in-house tool – **SimpliData** that enables us to deliver these integrations effortlessly. Please refer to our response to **Question #7 in Section 5.5 -Response to Organizational Operations** of this document to get an overview of SimpliData.

For Aims Community College, Kastech was engaged to support Banner Student, Financial Aid, AR, Banner Admin Pages, and **integrations with 86 applications** (including home grown systems and various third-party applications). We also implemented new applications and integrated with Banner (for example - Accudemia Cloud application, Qless Integration, Innovative Interfaces' Integrated Library system, Sierra).

C. Data Engineering Services

Kastech also offers data engineering services for the deployed ERP applications. In today's rapidly evolving digital landscape, data has become the lifeblood of organizations across industries. To stay competitive and make informed decisions, organizations need **robust data engineering capabilities** that support their data transformation journey.

Data engineering lays the foundation for data-driven success by enabling organizations to collect, store, process, and analyze data at scale. It involves the design, development, and maintenance of data pipelines, data lakes, and data warehouses. Effective data engineering ensures data quality, accessibility, and integration, facilitating seamless data consumption by various stakeholders within the organization.

We offer a wide spectrum of data engineering services that include:

- Data Consulting Services
- Data Management Platform and Data Warehouse Management
- Data Platform/Warehouse Modernization
- Data Governance & Security
- Data Modelling
- Data Infrastructure Management
- Data Research and Analysis
- Data Analytics & Support Services
- BI / Data Warehouse Implementation
- Data Retention & Purging

For **Virginia Community College System (VCCS)**, Kastech has provided comprehensive data services that included:

- Review the existing infographic created with static data.
- Requirements gathering, design & analysis, development, data integration, deployment, and support of the Microsoft Power BI implementation within the timeframe prescribed by VCCS.
- Aggregation of data from multiple databases and other data sources is required to complete the development of the reports and dashboards.
- Convert the report to be more dynamic and add drilldown and filtering options.
- Automate the extraction and consolidation of data to be accessible by the dashboard.
- Embed the report on the website and make it accessible to internal users.

D. Testing-as-a-Service

Kastech also provides testing-as-a-service for enterprise applications and IT solutions prior to deployment for organizations that need a third-party service provider with testing knowledge and required tools instead of draining their own resources. For example, for **Ohio State University (OSU)** Kastech provided **Regression Test Automation for PeopleSoft ERP application, Load Testing tool and services**, and Upgrade Acceleration Lab on cloud which helped in successfully deploying the project on time and on budget.

Outsourcing ERP testing to us eliminates the need for extensive in-house infrastructure and personnel, reducing overall testing effort and costs with flexibility to scale test resources easily based on the project requirements.

Kastech uses **both manual testing and automated testing** methods. For automated testing, we use our in-house tools and may also employ various third-party testing software. Our testing services include:

- **Functional Testing:** Testing of interfaces, reports, business processes, UI/GUI Testing, device compatibility
- **System Integration Testing (SIT)** – Validating data, reporting, security, and integrations have been designed and configured as expected
- **Load Testing:** Assess if the ERP application can manage high loads given a high demand from end-users; load testing investigates how the system acts under normal and high loads
- **Performance Testing:** Testing the responsiveness, speed, and stability of the ERP software application when subjected to a workload
- **Quality Assurance Testing:** Testing whether the ERP application is meeting the business requirements
- **Mobile app Testing:** Testing the mobile app(s) for both iOS and Android

Test Management Plan agreed by both the Client and Kastech will drive the entry and exit criteria for the test phases. The Client will provide the test scenarios for the testing interfaces and reports. Defect log will be maintained and reviewed throughout testing.

E. Project Management

The success of today's complex ERP engagements is directly proportional to how well the project is managed right from the beginning. Sometimes, our clients want an experienced vendor that can provide **overall coordination and management of all aspects of the planning and ERP implementation processes** and can act as their representative in leading the project team. We offer our expert project management services in such scenarios.

A recent example is **Veritone, Inc.**, which had been using NetSuite as its Finance and HCM applications for many years and decided to move from NetSuite to Oracle Fusion Cloud (Finance) and Workday HCM. Kastech was engaged to **provide project management services for the implementation of Workday HCM and Oracle Fusion Cloud (Finance)**. Kastech's project team was engaged for leading the development to delivery and managing the overall project. Our team had to coordinate with Veritone's multiple teams, including development, design, and QA, as well as to manage tight timelines and a limited budget. Our project management team implemented agile methodologies, established clear milestones and deliverables, identified potential risks and developed mitigation plans, and closely monitored the progress of this critical ERP transition project.

Right from Project Initiation to Project Planning, Project Execution and Control to Project Closure, we manage every aspect/step. We also assist with risk and issue management as well as project scope management. We work with our client to implement a process that manages on-going change by working with project stakeholders. This enables us to anticipate project conditions, provide our clients with an early warning of potential project impact, and present the client with options and recommendations that enable informed decisions to move ahead.

F. Change Management

Even when new processes and technology promise to improve the ability for a person to carry out its duties, it is human nature for people to resist being pulled away from the comfort zone of their current work environment and into a new way of doing things. Thus, to ensure that at the end of a new ERP software application implementation process, the users are ready, willing and able to adopt the new system, it is important that a well-thought-out Change Management and Communications Plan is developed and put into action.

We believe that **Change Management is a key differentiator** between projects that succeed and those that do not. The "people" side of these projects can make or break the success of the entire effort, so it needs to be carefully planned, managed and it needs to leverage experienced professionals in the process.

Kastech's Change Management Methodology includes the following six (6) pillars:



Exhibit 15: Change Management Approach

Each pillar is associated with some key activities and tasks as listed below.

#	Task / Activity	Change Deliverables
1.	Organizational Readiness Assessment	
	<ul style="list-style-type: none"> Determine the magnitude of change (transactional, operational, and transformational) and appropriate activities for this project, anchoring change solutions to business outcomes. Evaluate the organizational priorities competing for resources. Create a base plan that contains scope, timing, budget, benefits, general audience, and high-level anticipated impacts. 	<ul style="list-style-type: none"> Organizational Readiness Assessment Report (People, Process and Technology)
2.	Change Management Planning	
	<ul style="list-style-type: none"> Plan change management activities. Identify roles and responsibilities. Identify schedule and touch points. Identify processes and methods to track and monitor the progress on change management activities. 	<ul style="list-style-type: none"> Change Management Plan
3.	Leadership and Ownership <i>(To be led by the Client Organization and facilitated by Kastech)</i>	
	<ul style="list-style-type: none"> Assign a sponsor, leader, and change agent network. Provide sponsors with clear expectations, the tools needed to execute, and measures to drive accountability. Work with PMO to confirm executive alignment. Clarify the strategy in simple terms. Articulate the expected behavior changes. Build networks of change agents (“champions”) who will advocate the change, help support training, and build ongoing adoption, “champions”. These individuals will be identified early in the lifecycle of your program and their 	<ul style="list-style-type: none"> Executive and organization alignment plan Leadership Skills Assessment Leadership Role Definitions

#	Task / Activity	Change Deliverables
	<p>roles/responsibilities and involvement will change as the program progresses.</p> <ul style="list-style-type: none"> Balance user involvement to work to confirm a viable solution design while respecting other commitments. Engage all leaders in the implementation stage to work to confirm full commitment in all business areas, providing clear expectations, coaching on how to lead during change, the tools needed to execute, and measure to drive accountability for solutions in their teams. 	
4.	Communication Strategy	
	<ul style="list-style-type: none"> Inform, educate, and motivate people to perform and behave in ways consistent with the transformation agenda. Articulate a vision, case for change, what is changing and what's not, roles and responsibilities, change process, and link to strategy. Help people become committed to the new direction by providing them with opportunities to question, digest, and internalize the change. As change progresses, celebrate successes, share recommended practices, and capitalize on opportunities to highlight the performance and behaviour that are valued in the new organization. Solicit feedback on effectiveness of communication by measuring progress against desired outcomes. 	<ul style="list-style-type: none"> Communication Plan
5.	Learning and Training	
	<ul style="list-style-type: none"> Conduct Training Needs Analysis to identify skill gaps and applicability of existing training programs. Create documents that outline training content, instructional approach, facilitators, and timing. Develop all training materials: pre-requisites, classroom modules, training databases, job aids, etc. Implement training, including train-the-trainer, pilot, and rollout Evaluate training effectiveness and on-the-job proficiency. Deploy solutions to bridge performance gaps. 	<ul style="list-style-type: none"> High Level User Skills Assessment List of Candidates for Training High Level Training Needs Analysis Training Sessions Trainees evaluation and assessment report
6.	Organization Design & Talent Management <i>(To be led by the Client Organization and facilitated by Kastech)</i>	

#	Task / Activity	Change Deliverables
	<ul style="list-style-type: none"> Design / redesign roles and responsibilities to support new capabilities. Design / redesign reporting structures, compensation, and headcount to support new capabilities. Design / redesign recruiting, selection and placement criteria to support new capabilities. Design / redesign performance management criteria (incentives, performance appraisal metrics, and promotion, recognition) to support new capabilities. 	<ul style="list-style-type: none"> The Client Team/Staff are aligned with new processes and structure to enable business outcomes.

Table 28: Change Management Tasks and Deliverables

G. User Adoption Support

In our experience of working with public sector organizations, we have observed that new ERP implementations need strong user adoption and support. At the forefront of this change will be the user community whose way of performing their jobs will be significantly changed and improved by the new system. To achieve a successful implementation, the new ERP system must be accepted and adopted by its users. Kastech can play a significant role by providing user adoption support in the form of documentation support, for example, helping with the **creation of user manuals/job aids** etc.

5.2 Kastech's Capabilities – Primary Components of ERP

Address the Primary Components of an ERP System in Section 5.0, and provide a narrative as to how your firm delivers for each component.

Kastech's capabilities to provide services that address the needs of TXShare Entities relating to the eight (8) Primary Components of an ERP System are described below:

1. Accounting and Financial Management
<p>Kastech has provided comprehensive support for state and local governments in implementing ERP and managing their accounting and financial operations.</p> <p>Our expertise includes general ledger management, accounts payable and receivable, budgeting, grant management, and financial reporting.</p> <p>We assist clients in streamlining workflows, ensuring compliance with regulatory requirements, and integrating financial data for real-time insights.</p> <p>Automating the Accounts Receivable and Accounts Payable business processes using Robotic Process Automation (RPA) technologies is another area where we help our clients bring in improved efficiency.</p> <p>Our team specializes in optimizing financial processes to enhance transparency, reduce inefficiencies, and support informed decision-making through automated reporting and analytics.</p>
2. Human Resources (HR)

	<p>We provide end-to-end HR support, enabling government agencies to manage their workforce efficiently.</p> <p>Our services include payroll processing, benefits administration, talent acquisition, workforce planning, compliance reporting, and employee performance management.</p> <p>We focus on modernizing HR processes by leveraging automation, self-service capabilities, and data-driven insights to enhance employee experience and improve operational efficiency.</p> <p>Our solutions ensure alignment with labour laws, civil service regulations, and diversity initiatives.</p>
3. Customer Relationship Management (CRM)	
	<p>We help state and local agencies to improve citizen engagement and service delivery through CRM solutions, tailored to public sector needs.</p> <p>Our expertise includes case management, constituent tracking, service request management, and communication automation.</p> <p>By integrating CRM applications with other business functions, we enable agencies to enhance responsiveness, personalize interactions, and improve overall service quality.</p>
4. Business Intelligence (BI)	
	<p>We support the agencies to transform their raw data into actionable insights.</p> <p>We specialize in data integration, visualization, and predictive analytics, enabling decision-makers to monitor key performance indicators and track program effectiveness.</p> <p>By leveraging advanced analytics, we help agencies optimize resource allocation, detect fraud and anomalies, and improve strategic planning.</p> <p>Our solutions support data governance, ensuring accuracy, security, and compliance with public sector reporting requirements.</p> <p>Our flagship product SimpliData is designed to integrate disparate systems including ERP, Internal apps, third-party apps and files to harmonize the data for reporting.</p> <p>We also help our customers in building data warehouse for data storage and distribution.</p>
5. Supply Chain Management (SCM)	
	<p>We assist our clients in optimizing their supply chain operations, from procurement to vendor management and contract administration.</p> <p>Our capabilities include demand forecasting, inventory optimization, supplier performance tracking, and risk management.</p> <p>We help agencies reduce costs, ensure compliance with procurement regulations, and improve supply chain resilience through automation and real-time analytics.</p> <p>Our solutions enhance transparency and efficiency, ensuring critical goods and services are procured and delivered effectively.</p>
6. Manufacturing and Logistics Management	

	<p>We provide consulting services with respect to production planning, asset tracking, maintenance scheduling, and fleet management.</p> <p>Our solutions help streamline operations, enhance quality control, and ensure regulatory compliance.</p> <p>By integrating manufacturing and logistics workflows, we enable agencies to improve productivity, reduce waste, and optimize distribution channels for public programs and emergency response operations.</p>
7. Inventory Management	
	<p>Our inventory and warehouse management services help agencies efficiently track, order, store, and distribute materials.</p> <p>Our expertise includes real-time inventory tracking, automated replenishment, warehouse optimization, and asset lifecycle management.</p> <p>We assist agencies in reducing waste, improving stock accuracy, and ensuring timely availability of critical supplies.</p> <p>Our approach enhances operational efficiency and ensures compliance with public sector inventory regulations.</p>
8. Warehouse Management	
	<p>Like explained above, Kastech has expertise in inventory and warehouse management. Our core areas of expertise in warehouse management include the following:</p> <ul style="list-style-type: none"> • Optimization of the warehouse space • Scheduling labor for various functions and tracking the work done • Solutions for managing inventory • Tracking orders • Controlling warehouse operations • Overseeing inventory reception and storage • Continuous enhancements and planning future improvements for the system.

Table 29: Capabilities to address Primary Components of ERP

5.3 Kastech's Capabilities – Other Features

Should your firm be capable of addressing the Other Features, provide a narrative as to how your firm delivers for each other feature.

Kastech has provided below a detailed account of how we can address some of the “Other Features” components desirous of an efficient ERP System:

1. Risk Management	
	<p>We help customers in risk identification and management through assessments and continuous monitoring of financial discrepancies and security vulnerabilities before they escalate.</p> <p>By integrating role-based access controls and segregation of duties, we ensure robust internal controls and enhance transparency in risk reporting. This approach not only facilitates compliance with evolving regulatory standards but also supports informed decision-making.</p>
2. Sales Order Management	
	<p>We are well equipped in supporting and optimizing the entire sales order management process, independent of the underlying ERP technology in use.</p> <p>Our process focuses on understanding the unique workflows and challenges of each client to ensure that every stage of the order lifecycle, from initial order capture and validation to fulfilment and invoicing is streamlined and effective.</p> <p>Our expert teams collaborate closely with business leaders to map current processes, identify inefficiencies, and implement best practices that enhance accuracy and speed. We provide process improvement support, including training, change management, and performance monitoring, ensuring that sales orders are processed efficiently and align seamlessly with other critical business functions such as inventory, logistics, and finance.</p>
3. E-Commerce Market Management	
	<p>We collaborate with clients to develop and refine effective strategies for managing product catalogs, streamlining online order fulfilment, and ensuring smooth payment processing.</p> <p>Our approach emphasizes robust market analytics and performance monitoring, enabling organizations to adapt swiftly to shifting consumer behaviors and market trends.</p>
4. Advanced Planning and Forecasting	
	<p>Our teams have experience with advanced planning and forecasting through a comprehensive suite of "EPM modules" that drive integrated financial and operational insights.</p> <p>We work collaboratively with clients to streamline planning cycles, develop forecasting models, and align strategic goals with actionable data.</p> <p>We focus on mapping out business drivers, establishing clear performance metrics, and designing scenario-based models that adapt to dynamic market conditions.</p>

Table 30: Capabilities to address Other Features of ERP

5.4 Response to Operational Challenges

Challenge Statement #1: *How can your firm assist in the maintenance and efficiency improvements of or the total replacement of a public-sector entity's legacy Budget, Financial Management, Financial Reporting, Procurement, and other logistical systems?*

Kastech's Response: Kastech supports public-sector entities through every stage of modernizing legacy systems. We begin by performing a comprehensive analysis of current operations which includes reviewing budgeting, financial management, financial reporting, procurement, and other logistical functions to identify inefficiencies and opportunities for improvement. We conduct thorough assessments and provide recommendations for optimization. We also support customers with optimization by providing the right resources or by managing the complete optimization project.

The primary objectives of assessment and optimization includes :

- **Analyze Base Functionality:** Conduct a thorough review of the Client's ERP system to understand current usage, configurations, and capabilities.
- **Gather Insights:** Engage with the Client's functional staff to capture first-hand knowledge of existing pain points and operational challenges.
- **Identify Quick Wins:** Pinpoint immediate improvements that can be implemented with minimal disruption to yield rapid benefits.
- **Develop a Roadmap:** Create a prioritized list of enhancements and strategic recommendations that align with both short-term needs and long-term goals.

In the event, the clients wants to implement a new ERP, we assist in defining precise requirements and lead the ERP selection process, ensuring that the chosen solution aligns with their strategic, regulatory, and operational needs. Our vendor assessment services rigorously evaluate potential partners, considering factors such as functional fit, implementation expertise, and long-term support capabilities.

Additionally, our change management services are designed to ensure a smooth transition, with tailored communication strategies, training programs, and stakeholder engagement plans that facilitate organizational buy-in and maintain business continuity. Through this holistic approach, we help public-sector organizations either enhance their existing systems or fully replace them, delivering improved efficiency, transparency, and value in every phase of the transformation journey.

Challenge Statement #2: *How can your firm reduce the sizable technology risk exposure resulting from software obsolescence, hardware/technical infrastructure obsolescence, and the increasing scarcity of technical resources?*

Kastech's Response: Kastech addresses technology risk exposure by taking a proactive and comprehensive approach to modernizing our client's IT landscape. We begin with a thorough assessment of our client's current software, hardware, and technical infrastructure to identify areas where obsolescence poses a risk. Using this insight, we develop a strategic technology roadmap that outlines phased modernization initiatives such as migrating to scalable, cloud-enabled environments that reduce reliance on legacy systems.

Our vendor assessment process ensures that any new solutions are not only functionally robust but also backed by strong support ecosystems, mitigating risks associated with future obsolescence.

Additionally, we recognize that the scarcity of technical resources can impede modernization efforts, so we focus on knowledge transfer and targeted training programs that empower our client's internal teams. In scenarios where in-house expertise is limited, we offer managed services and resource augmentation, providing skilled professionals to bridge the gap.

Through these combined strategies, we minimize technology risk, ensure continuity, and enable our client organization to thrive in an evolving technological landscape.

***Challenge Statement #3:** How can your firm resolve much of the fragmentation of existing administrative systems environment, which hinders process efficiency due to dual data entry, system reconciliations, data-synchronization adjustments, reporting from fragmented data sources, etc.?*

Kastech's Response: With years of experience working with enterprise clients, we specialize in eliminating the inefficiencies that arise from fragmented administrative systems.

We recognize that dual data entry, constant system reconciliations, data-synchronization adjustments, and disjointed reporting not only slow down operations but also create significant opportunities for errors. To address these challenges, we leverage **our flagship product, SimpliData**, which is purpose-built to seamlessly integrate disparate systems.

SimpliData enables real-time data exchange between legacy and modern applications, ensuring that all critical information is synchronized and available from a single, unified source. This integration minimizes manual interventions, eliminates data silos, and provides a consolidated view for accurate reporting and analysis. By bridging the gaps between the existing systems, we help streamline workflows, reduce administrative overhead, and ultimately drive greater process efficiency.

***Challenge Statement #4:** How would your firm incorporate functionality that meets or exceeds Federal security standards (e.g., NIST, FedRAMP Moderate), and provide security functions such as role-based segregation of duties and configurable approval rules that significantly strengthen financial controls?*

Kastech's Response: We build security into every layer of our solutions and services to ensure compliance with Federal standards. We incorporate robust security frameworks from the ground up implementing stringent encryption, continuous monitoring, and multi-factor authentication to safeguard sensitive data.

Our approach includes a design that emphasizes role-based segregation of duties, ensuring that no single user can complete a high-risk transaction without oversight. In addition, our configurable approval rules help organizations to define and enforce tailored workflows that rigorously control financial transactions, thereby significantly strengthening internal financial controls and reducing the risk of fraud. This integrated security strategy not only meets Federal mandates but also provides the agility to adapt to evolving compliance requirements, ensuring our clients' systems remain secure in a dynamic threat landscape.

Challenge Statement #5: *What recommended improvements for a system that would be fully integrated with the financial management, asset management, and inventory functions, thereby improving process efficiency and control would your firm suggest?*

Kastech's Response: Kastech would recommend a strategic modernization of ERP that seamlessly integrates financial management, asset management, and inventory functions into one unified system.

First, we would assess current workflows to identify inefficiencies such as data silos and redundant manual processes. With this analysis, we advocate for adopting a modern, cloud-based SaaS ERP solution that provides an integrated suite of modules.

ERP solutions such as Oracle Cloud, NetSuite, Workday Financial Management are designed to support end-to-end process integration, ensuring that every function from budgeting and financial reporting to asset lifecycle management and real-time inventory tracking is connected in single platform. These systems offer real-time data visibility, advanced automation, and robust controls that continuously evolve to meet customer needs and regulatory changes. By leveraging such a platform, organizations can eliminate dual data entry, improve data accuracy, and drive operational efficiencies, ultimately enhancing process control and enabling more informed decision-making.

Challenge Statement #6: *What services can your firm provide for better tracking and management of the projects and assets?*

Kastech's Response: Kastech offers comprehensive suite of services to enhance the tracking and management of projects and assets. Our services include project portfolio management, which provides real-time dashboards and analytics to monitor milestones, resource allocation, and risk factors ensuring that every project is on track and aligned with strategic goals.

In parallel, we deliver asset management consulting that spans the entire asset lifecycle from acquisition and maintenance to performance evaluation and decommissioning—ensuring optimal utilization and compliance with regulatory standards. We have also implemented automated reporting and alert systems to detect issues early, enabling proactive adjustments.

Challenge Statement #7: *How can your firm achieve process standardization based on best practices through the implementation of a unified technology platform?*

Kastech's Response: Whenever organizations choose a unified technology platform, the objective is to have process standardization across the organization for improved efficiency and consistent service delivery. Business process discovery and business process implementation are two critical aspects where Kastech can play a big role to achieve process standardization based on the best practices.

a. Detailed Discovery sessions for business processes:

During these discovery sessions, Kastech team interfaces with key representatives from each department or division that is going to be a part of the unified technology platform. The objectives of these sessions can be best explained through the following three steps:

Step 1

- Our team identifies and documents all instances across the organization where a specified task is being carried out as part of the business operations.

Step 2

- Next step is to identify and document the different process configurations used for carrying out each of the tasks as identified on step 1.

Step 3

- We collaborate with the key stakeholders and look for opportunities for uniting the different process configurations into one.

Exhibit 16: Business Process Discovery

This exercise allows us to analyze duplicates of an existing process across an organization and working out a single solution that helps achieve organizational goals faster and more efficiently. Kastech uses tools driven process flow diagrams to depict different process configurations. With an overview of the different process configurations used to achieve the same outcome across the organization, we can begin working to create a **unified process outline** for use across any instance of that task and which is aligned with the chosen unified technology platform.

b. Implementation of the improved processes:

Based on the insights gathered, we design and implement a centralized system that standardizes workflows across functions such as financial management, procurement, human resources, and supply chain operations. In our experience with modern ERP systems like Oracle Cloud and Workday, we've seen how a unified platform not only enhances process automation and data integrity but also enables real-time analytics and consistent reporting.

***Challenge Statement #8:** What methods would you provide for the reduction of paper-based processes by leveraging electronic workflow, approval, document management, and retention capabilities where appropriate?*

Kastech's Response: Kastech has the capabilities to implement electronic workflows and robotic process automation leveraging leading technologies to automate business processes that require significant manual intervention. Our solutions for process automation can be combined with a robust document management system that incorporates electronic review, approval with e-signature and retention capabilities.

For instance, Kastech is currently working with the **State of Wyoming - Department of Environmental Quality ("DEQ")** to implement a **centralized dashboard/inbox/task-list** view solution which will allow all authorized signatories to see/review/sign the documents pending review, approval and signatures. DEQ are currently struggling with a manual email and/or paper-based process for internal signatures for permits, travel requests, payments and other internal documents

that require a signature. As a result, it is difficult to track pending signatures or to ensure proper routing.

Challenge Statement #9: *What methods could your firm provide for the capturing and production of consistent, expandable set of data?*

Kastech's Response: At Kastech, we understand that the sheer volume and complexity of data generated/captured require robust mechanisms to identify, understand, and utilize the right data assets efficiently. Kastech has defined the following methods/mechanisms to assist organizations with their data transformation journey.

- **Data Discovery and Engineering services:** Kastech empowers organizations to uncover hidden insights, make informed decisions, and respond swiftly to changing market demands.
- **Data Governance services:** Without effective governance, data can become unreliable, inconsistent, and prone to breaches, leading to compromised data quality and security. Our solution allows organizations to define policies and ensure data security, promoting compliance with industry regulations.

We have a tool – **SimpliData** which we leverage to provide data governance and data engineering services. Here are some **real-world scenarios** where we have provided significant value to organizations on aspects related to the capturing and production of consistent, expandable set of data with relevant insights.

#	Real world scenarios	Our Solution
1	Struggling to maintain data governance across various departments and data sources	We can help create a centralized data catalog with defined data governance policies. Data stewards could now easily manage data assets, define access controls, and enforce data quality standards. This leads to improved compliance, minimized data duplication , and increased confidence in data accuracy among stakeholders.
2	Challenges in finding and accessing relevant data scattered across multiple systems	With our unified data catalog, organizations could quickly locate the required data, speeding up decision-making processes. The SimpliData platform's user-friendly interface makes it easy for non-technical staff to navigate and explore data effectively.
3	Needed to track data lineage and transformations to comply with data regulations and conduct thorough audits	We provide a comprehensive data lineage view , enabling to trace data origins and document transformations at each stage. This helps ensure data compliance, enhanced data transparency , and reduces the time and effort required for auditing.
4	Data analysts and business users face challenges in sharing data insights and collaborating effectively	The collaboration and documentation features of SimpliData Platform allow teams to annotate and share valuable insights, facilitating cross-functional collaboration . This improves communication, accelerates problem-solving, and promotes knowledge sharing across the organization.
5	With a diverse data infrastructure looking for a	SimpliData platform's flexible integration capabilities allow teams to easily connect with their data pipelines, data lakes,

#	Real world scenarios	Our Solution
	solution that would seamlessly integrate with the existing data tools and technologies	<p>and data warehouses, promoting a cohesive data ecosystem without disrupting ongoing operations.</p> <p>It allows seamless integrations with popular databases. Robust connectors and APIs integrate with a wide range of databases and data sources, including MySQL, PostgreSQL, Oracle, Microsoft SQL Server, and more. This allows organizations to centralize metadata from various data systems, providing a unified view of the entire data landscape.</p> <p>Flexibility and ease of integration with existing data infrastructure make it a valuable asset for organizations of all sizes. Seamlessly fits into the existing data infrastructure, reducing implementation complexity and minimizing disruption to ongoing operations.</p>

Table 31: Real World Scenarios on Data Transformation Journey

Challenge Statement #10: *How can your firm enable a more flexible solution to meet evolving business requirements (e.g., compliance with Governmental Accounting Standards Board [GASB] guidance) that is configurable by business users and does not require software developers to adjust/maintain system rules?*

Kastech's Response: Modern ERP systems, like Workday, are revolutionizing the way organizations manage their business processes by shifting from heavy customization to configurable processes that business users can adjust directly. These solutions are built on flexible frameworks that allow organizations to define, modify, and optimize their workflows ranging from financial processes to human resources and beyond—using intuitive, user-friendly configuration tools rather than extensive code customizations. This means that when regulatory requirements change, such as updates from GASB, business users can quickly and efficiently update the necessary processes without relying on IT team or developers, reducing both time and costs.

We have supported customers during this transition by providing comprehensive process mapping, best practice consulting, data conversion, integration, reporting and targeted training services that help business teams to fully leverage these modern, SaaS-based ERP platforms. This approach not only enhances agility and responsiveness but also ensures that organizations maintain a competitive edge while adhering to evolving industry standards.

Challenge Statement #11: *How would you provide for enhanced compliance with Section 508 of the Americans with Disabilities Act regarding accessibility?*

Kastech's Response: All enterprise software applications (Oracle PeopleSoft, Oracle Fusion Cloud, Workday, Banner, Salesforce, UKG, and SAP) that we work with are committed to comply with Revised Section 508 and the WCAG 2.2 AA standards to the extent possible using multiple methodologies. These software vendors publish Accessibility Conformance Reports (ACRs) based on the Voluntary Product Accessibility Templates (VPATs).

While customizing/developing web portals, applications and mobile app(s) that work in tandem with these enterprise applications, we follow the following set of rules/principles for ensuring compliance with the accessibility guidelines of Section 508 of the Americans with Disabilities Act:

a. Provide text alternatives for images and multimedia.

Images have textual descriptions to help screen reader users understand them. Similarly, videos and audio files include captions, subtitles and transcripts to help people with visual and auditory hearing impairments.

b. Ensure screen reader and keyboard accessibility.

As vision impaired users and people with motor-related disabilities use screen readers and keyboards to interact with online content, we make them accessible for such users.

c. Use color contrast.

We ensure text colors and backgrounds have sufficient contrast for everyone to be able to read them. This rule also applies to instances where color conveys other graphical information such as diagrams, maps, icons and buttons.

d. Enable text resizing.

This allows visually impaired users to increase the size of text content for easier reading without relying on assistive technology.

e. Make time limits adjustable.

Removing time limits or making them adjustable helps people with disabilities who may need more time to complete tasks (e.g., when filling out a web form or reading online content).

Challenge Statement #12: How would your firm conduct Business Process Reviews for Finance, Human Resources, Academic/Student Affairs, Procurement functionalities?

Kastech's Response: We conduct a comprehensive business process review using a structured, multi-phase approach that begins with discovery and stakeholder engagement, followed by detailed process mapping, gap analysis, and benchmarking against industry best practices and regulatory standards. We then deliver actionable recommendations and a roadmap for improvement.

We start by gathering all relevant documentation and conducting interviews with key stakeholders to understand the "as-is" state of operations. Next, we map out each process in detail to identify inefficiencies, redundant activities, and compliance gaps. We then benchmark these findings against best practices and regulatory requirements. Finally, we develop a target state that outlines streamlined processes and actionable improvement recommendations, accompanied by a change management plan to facilitate smooth implementation.

Finance:

For finance, our review focuses on critical functions such as budgeting, forecasting, financial closing, and reporting. We analyze internal controls, transaction flows, and compliance with standards like GASB or GAAP. By identifying bottlenecks and areas where manual intervention slows processes, we recommend solutions that enhance automation, improve data accuracy, and ensure timely reporting.

Human Resources:

In the HR domain, we examine end-to-end processes including recruitment, onboarding, payroll processing, benefits administration, and performance management. Our approach emphasizes the identification of opportunities to streamline workflows, improve employee self-service capabilities, and ensure adherence to employment laws and organizational policies—all while enhancing the overall employee experience.

Academic/Student Affairs:

For academic and student affairs, we review processes such as admissions, registration, student records management, academic advising, and financial aid administration. Our objective is to streamline interactions among students, faculty, and administrators, reduce manual data entry, speed up student enrolments, and enhance the accuracy and timeliness of academic reporting, ultimately supporting a superior student experience.

Procurement:

When reviewing procurement functions, we assess the entire requisition-to-payment cycle, including vendor selection, purchase order processing, contract management, and invoice reconciliation. We look for inefficiencies such as dual data entry and manual reconciliations and recommend process standardization and automation to reduce costs and improve compliance with internal policies and external regulations.

We would tailor our approach to the specific needs of each functionality while leveraging our process review framework ensuring that improvements are both practical and aligned with strategic objectives.

Challenge Statement #13: How can your firm provide efficiency enhancements to existing Time and Expense modules as desired?

Kastech's Response: We have helped customers enhance their Time and Expense modules by conducting a detailed review of current workflows to pinpoint inefficiencies and manual bottlenecks. We then implemented targeted process improvements that mirror best practices seen in modern systems such as streamlined, self-service interfaces for real-time data entry, automated validation rules, and mobile-enabled functionality.

By redesigning approval workflows and integrating these modules more seamlessly with payroll and financial reporting systems, we have reduced administrative overhead.

During this process, we also supported with change management and user training, making sure that staff can easily adapt to the improved, configurable processes. This not only accelerated the processing times and reduced errors but also positioned the client organization to respond quickly to evolving business requirements.

Challenge Statement #14: How does your firm review and make recommendations for transitioning to or from cloud-based systems to on-premises based systems?

Kastech's Response: Transitioning between on-premises and cloud-based ERP systems is a complex endeavor that requires meticulous planning and execution. Kastech adopts a comprehensive approach to facilitate this process, encompassing several critical phases:

Phase 1 - ERP Selection:

- **Needs Assessment:** We begin by conducting a thorough analysis of your organization's operational requirements, scalability goals, and budget constraints. This assessment ensures that the selected ERP system aligns with your strategic objectives.
- **Market Research:** Our team evaluates various ERP solutions, considering factors such as functionality, customization capabilities, vendor reputation, and total cost of ownership.
- **Fit-Gap Analysis:** We perform a detailed comparison between your business processes and the features offered by potential ERP systems to identify any gaps and determine the best fit.

Phase 2 - Vendor Selection:

- **Request for Proposal (RFP) Development:** We craft comprehensive RFPs that clearly outline your requirements, enabling vendors to propose solutions tailored to your needs.
- **Evaluation Criteria:** Our firm establishes objective criteria to assess vendor responses, including technical capabilities, implementation methodology, support services, and financial stability.
- **Demonstrations and References:** We coordinate product demonstrations and consult existing clients to gain insights into the vendor's performance and reliability.

Phase 3 - Change Management:

- **Stakeholder Engagement:** Recognizing the importance of buy-in, we involve key stakeholders early in the process to address concerns and set clear expectations.
- **Communication Plan:** Our team develops a communication strategy to keep all parties informed about project milestones, timelines, and responsibilities.
- **Training Programs:** We design and deliver training sessions tailored to different user groups, ensuring a smooth transition and effective utilization of the new system.

Phase 4 - Data Conversion:

- **Data Mapping:** We identify data elements from the legacy system and map them to the new ERP structure, ensuring consistency and accuracy.
- **Data Cleansing:** Our process includes validating and cleaning data to eliminate redundancies and errors before migration.
- **Testing and Validation:** Post-migration, we conduct rigorous testing to verify data integrity and functionality within the new system.

Phase 5 - Integrations:

- **System Inventory:** We catalog existing systems and determine integration requirements to maintain seamless operations.

- **Interface Development:** Our team designs and develops interfaces that facilitate real-time data exchange between the ERP and other applications.
- **Testing:** Comprehensive testing ensures that integrations function correctly and data flows as intended.

Phase 6 - Reporting:

- **Requirements Gathering:** We collaborate with stakeholders to identify critical reporting needs and compliance requirements.
- **Report Design:** Utilizing the ERP's reporting tools, we design templates that provide actionable insights and support decision-making.
- **User Training:** We train users on how to generate and interpret reports, empowering them to leverage data effectively.

Additional Considerations:

- **Security and Compliance:** Ensuring that the new ERP system adheres to industry standards and regulatory requirements is paramount.
- **Phased Implementation:** We often recommend a phased rollout, starting with core modules to minimize disruption and allow for adjustments based on initial feedback.
- **Post-Implementation Support:** We provide ongoing support to address any issues, optimize system performance, and implement continuous improvements.

5.5 Response to Organizational Operations

1. Description of the Proposer's process for responding to an order for product.

Kastech's Response: At Kastech, once we receive the Statement of Work (SoW) and the purchase order, we review it. Once the PO is signed by both the parties (Kastech and the Client), we begin with project planning. The project kicks-off on the date as mutually agreed with the client. All project activities and deliverables as part of the scope are executed as per the Project Plan.

2. Description of the Proposer's process for delivering orders to respective clients.

Kastech's Response: We deliver our services based on the project plan (milestones and deliverables) as agreed with the customer.

3. Description of the Proposer's customer satisfaction services, to include any warranty and/or repair capabilities.

Kastech's Response: Customer satisfaction is our prime focus in all engagements. Here are certain measures/steps that we follow as part of our process.

- **Regular quality audits:** Periodic internal reviews to ensure the adherence to the Quality Assurance Plan.
- **Feedback loops:** Regular feedback sessions with Client's project manager/contract manager to understand satisfaction levels and areas of improvement.
- **Managed services:** We offer warranty services to ensure the deployed solution/application continues to function as it is expected to, as part of our managed services offerings.

4. *Description of the Proposer's invoicing process used by the Proposer.*

Kastech's Response: Kastech typically follows monthly invoicing process as agreed with the customer. However, sometimes, our clients may want us to go for milestone-based payments process. We follow a NET-30 days payment terms.

For consulting services, any applicable travel expenses are billed at actual costs and included in the monthly invoice.

5. *Any assumptions made in responding to the requirements.*

Kastech's Response: While responding to Category #1, we have assumed that the service category includes the ERP application managed services to extend their life span and enhance functionality and DOES NOT include managing the IT infrastructure and/or any hardware required for ERP applications.

6. *Any exceptions to the requirements. If there are no exceptions, Proposer shall explicitly state that no exceptions are taken to any part of this RFP. Offer must be in compliance with stated term and conditions unless NCTCOG accepts identified exceptions of the Proposer.*

Kastech's Response: Kastech has no exceptions to any part of this RFP. Kastech agrees to comply with the terms and conditions as stated in the RFP.

7. *Any special features or services the Proposer is proposing in response to the requirements that are included within the pricing provided.*

Kastech's Response: Over the years, with our experience working on multitude of ERP projects and transitioning customers moving from on-prem to Cloud applications, we have identified the need of automation and building tools to fill in the process gaps and smoothen the transformation journey.

We have included the pricing of the following ERP project related tools in the cost proposal:

A. SimpliData

SimpliData is a **powerful data engineering and governance platform** designed to transform the way organizations manage and leverage their data assets. With a comprehensive suite of features, the platform is built to **streamline the entire data lifecycle**. It excels in capturing, managing, and visualizing metadata across diverse data sources, offering a **unified data catalog**

that provides a centralized view of all data assets. Allows users to effortlessly explore, search, and understand data, saving valuable time and effort

The comprehensive suite of features empowers organizations to optimize their data management processes, enabling data-driven decisions and innovation.



User Friendly

SimpliData features a user-friendly interface that offers an intuitive design, making adoption smooth and effortless for all users, regardless of their technical background.



Unified Data Catalog

SimpliData offers a centralized view of all data assets, simplifying data discovery and exploration for users.



Data Lineage and Transformation

SimpliData enables tracking data origin and transformations, ensuring data quality and providing valuable insights into data governance.



Data Governance

SimpliData allows organizations to define policies and ensure data security, promoting compliance with industry regulations.



Fosters Collaboration

SimpliData facilitates seamless teamwork, allowing users to annotate and share insights with teammates, fostering collaboration and knowledge sharing

Exhibit 17: Features and Capabilities of SimpliData

SimpliData enables integrations between our clients' ERP applications and various data sources.

- Seamless integrations with popular databases, ensuring a smooth and efficient data management experience.
- Robust connectors and APIs that integrates with a wide range of databases and data sources, including MySQL, PostgreSQL, Oracle, Microsoft SQL Server, and more.
- Allows users to centralize metadata from various data systems, providing a unified view of the entire data landscape.
- Flexibility and ease of integration with existing data infrastructure make it a valuable asset for organizations of all sizes.
- Designed to work seamlessly with different data tools, data lakes, data warehouses, and data pipelines, promoting a cohesive data ecosystem.
- Seamlessly fits into the existing data infrastructure, reducing implementation complexity and minimizing disruption to ongoing operations.

B. Performance Testing Tool

Early identification of load limitations helps to configure the ERP system appropriately to avoid unexpected crashes during the ERP upgrade. To aid this, Kastech has developed a **performance testing tool** which would help identify the performance bottle necks ahead of time and prepare accordingly. The tool will be used during the dry run phase when the infrastructure is provisioned for the new production. Post-performance test, we provide recommendations and improvement plans. The goals of performance testing are:

Assess the Production Readiness:

- Check the system response time during expected load conditions
- System behavior during unexpected load conditions
- Check the system scalability
- Best configuration settings for optimal performance
- System behavior during spike user loads

System stability:

- Compare two platforms with the same software to see which performs better
- Compare Performance characteristics of system configurations
- Evaluate System against performance criteria
- Find throughput level
- Discover what parts of the application perform poorly and under what conditions
- Finding the source of performance problems
- Support system tuning

C. emSigner – A Digital Signature Solution

Electronic/Digital Signature is one of Kastech's dedicated practice areas where we have partnered with a leading global company – eMudhra - that offers a comprehensive and a highly cost-effective **eSignature solution – emSigner** - that has been described by Gartner as "Global, Full Service, Enterprise Electronic & Digital Signatures".

Quick-to-deploy, emSigner offers a seamless enterprise-wide eSignature workflow and has around 30% lower Total Cost of Ownership (TCO) than several other comparable products in the market. This data is based on our comparative study across industries for mid-size to large organizations.

emSigner is designed to **enable digitization and eliminate manual tracking of routing and pending signatures** across enterprise business processes that haunts many organizations across all industries today. Being an eSignature enabled document processing automation platform, emSigner powers electronic signing workflows including bulk signatures to transform customer experience and manage risk governance better.

On compliance and industry standards, emSigner has been a trusted and reliable eSignature solution with several certifications and licenses including WebTrust, HIPAA Compliance, Direct Trust, SOC 2 Type 2, EU GDPR Compliant, and EAL4+.

6 Pricing Proposal

Please refer to the attachment – **Exhibit B** – for our proposed rate card for the different roles anticipated for the proposed product categories.

7 Required Attachments

Kastech has completed and included the following required attachments.

REQUIRED ATTACHMENT CHECKLIST

Please utilize this checklist to ensure that all required attachments are included with your proposal. IF AN ATTACHMENT DOES NOT APPLY, PLEASE MARK AS “**NOT APPLICABLE**” AND SUBMIT WITH THE PROPOSAL. FAILURE TO SUBMIT **ALL REQUIRED DOCUMENTS** MAY NEGATIVELY IMPACT YOUR EVALUATION SCORE.

- ☒ Page 1 - Cover Sheet
- ☒ Page 19 - Attachment I: Instructions for Proposals Compliance and Submittal
- ☒ Page 20 - Attachment II: Certification of Offeror
- ☒ Page 21 - Attachment III: Certification Regarding Debarment
- ☒ Page 22 - Attachment IV: Restrictions on Lobbying
- ☒ Page 24 - Attachment V: Drug-Free Workplace Certification
- ☒ Page 25 - Attachment VI: Certification Regarding Disclosure of Conflict of Interest
- ☒ Page 28 - Attachment VII: Certification of Fair Business Practices
- ☐ Page 29 - Attachment VIII: Certification of Good Standing Texas Corporate Franchise Tax Certification
- ☒ Page 30 - Attachment IX: Historically Underutilized Businesses, Minority Or Women-Owned Or Disadvantaged Business Enterprises
- ☒ Page 31 - Attachment X: Federal and State of Texas Required Procurement Provisions
- ☒ Page 34 - Exhibit A: Description of Desired Product Categories for Proposed Pricing
- ☒ Page 36 - Exhibit B: Sample Market Basket Form
- ☒ Page 38 – Exhibit C: Service Area Designation Forms
- ☒ Respondent recognizes that all proposals must be submitted electronically through Public Purchase by the RFP due date and time. All other forms of submissions will be deemed nonresponsive and will not be opened or considered.