STEP 4 · PROCURE

Phase Schedule 4

Request for proposal and evaluation
Meridian Property Management, under the Standard Terms of Trade.

Prepared for

James Hartley

Meridian Property Management

October 2026

CLIENT CONFIDENTIALITY & ANONYMISATION

This sample document is based on a real client engagement. The organisation and individual names have been changed to protect client confidentiality. The document is published with the client's permission for illustrative purposes.

Intelligent Choice treats client confidentiality and the responsible handling of business information as fundamental to our work.

This Phase Schedule is for **Meridian Property Management**, Phase 4 (Procure), under the Intelligent Choice Standard Terms of Trade. The Phase Fee is [redacted].

SECTION 01

Parties and agreement

1.1 Client: Meridian Property Management, attention James Hartley. Address: [redacted].

1.2 Consultant: Intelligent Choice AI Consulting, ABN 78 462 883 855. Address: 2305/103 South Wharf Drive, Docklands 3008, Victoria.

1.3 Governing agreement: this Phase Schedule forms part of the Intelligent Choice Standard Terms of Trade (the Standard Terms). If this Phase Schedule and the Standard Terms conflict, this Phase Schedule prevails for Phase 4 only (clause 17.9).

1.4 Phase history: Phase 1 (Discover) was completed under Phase Schedule 1, Phase 2 (Blueprint) under Phase Schedule 2, and Phase 3 (Prove) under Phase Schedule 3. The Client's decision to proceed to Phase 4 is recorded by signing this Phase Schedule (clause 2.4).

1.5 Defined terms: capitalised terms have the meanings given in the Standard Terms.

SECTION 02

Phase scope

2.1 Purpose. The Procure phase prepares the Client to select and contract a build partner or vendor for the solution validated in Phases 1 to 3. It sets the requirements, runs the tender, and evaluates responses against those requirements.

2.2 Objectives. The Procure phase will:

- turn the Blueprint and the proof-of-concept results into a clear set of requirements and acceptance criteria;
- run a structured tender with a consistent set of questions and a scoring method agreed in advance;
- evaluate responses and shortlist the strongest candidates; and
- give the Client a recommendation it can act on, without the Consultant making the selection.

2.3 Included. The Consultant will:

- draft the Request for Proposal (RFP) and the supporting tender pack;
- agree the evaluation criteria and scoring matrix with the Client before the RFP is issued;
- answer up to [redacted] clarification questions from respondents, in writing, on the Client's behalf;

- score written responses and attend up to [illegible] shortlist interviews; and
- prepare the evaluation report and shortlist recommendation.

2.4 Excluded. The Procure phase does not include:

- selecting a vendor or builder, which is the Client's decision;
- negotiating or signing any vendor or builder contract, or drafting it (clause 4.4(a) of the Standard Terms applies to legal drafting);
- building, configuring or testing any software or integration; or
- managing the vendor relationship after selection.

SECTION 03

Deliverables

3.1 The Consultant will deliver the following. Each Deliverable is provided as a document and is subject to clause 5.6 of the Standard Terms (review and acceptance).

- **D1: Request for Proposal.** The scope, requirements, response instructions, timeline and evaluation criteria.
- **D2: Tender pack.** The supporting materials respondents need to submit a comparable response.
- **D3: Response evaluation matrix.** The scoring of each response against the agreed criteria.
- **D4: Evaluation report.** The evaluation summary, the shortlist recommendation, and the reasons for each recommendation.

3.2 Timing. D1 and D2 are provided within [illegible] Business Days after the sign-off of the requirements in section 6. D3 and D4 are provided within [illegible] Business Days after the close of responses.

3.3 Versions. The Consultant will provide one review draft of D1 and D2, and one final version after the Client's comments. Further changes are handled as Change Requests under clause 3.8 of the Standard Terms.

SECTION 04

Timetable

4.1 Working sessions. The Consultant will run the following stages, scheduled with the Client:

- requirements sign-off session with the managing director and the operations lead, 1 session of up to 60 minutes, on [illegible];
- RFP drafting and issue, over approximately [illegible] weeks, with the RFP issued on [illegible];
- response period of [illegible] weeks, during which the Consultant answers clarification questions;
- evaluation of responses and shortlist interviews, over approximately [illegible] weeks; and
- evaluation readout session with the Client's sponsor, 1 session of up to 60 minutes, on [illegible].

4.2 Indicative duration. The Phase runs for approximately [illegible] weeks from signing, subject to the Client's availability under section 6.

4.3 Review window. The Client will review D1 and D2 within 10 Business Days of receipt, under clause 5.6 of the Standard Terms.

SECTION 05

Phase Fee and payment

5.1 Phase Fee. The Phase Fee for Phase 4 is a fixed fee of [illegible]. It covers the Services and Deliverables in sections 2 and 3, and the sessions in section 4.

5.2 Invoicing. The Consultant will invoice as follows:

- 50% of the Phase Fee on signing this Phase Schedule; and
- the balance on delivery of D4 in final form.

5.3 Payment. Invoices are payable within 14 days under clause 3.3 of the Standard Terms.

5.4 Third-party costs. Any tender platform or e-tender portal fees are payable by the Client directly, or reimbursed at cost with the Client's prior written approval. No other third-party costs are payable under this Phase Schedule.

5.5 Changes. Any additional work is charged under clause 3.8 of the Standard Terms.

SECTION 06

Client dependencies and assumptions

6.1 Client dependencies. The Client will:

- sign off the requirements, scoring criteria and shortlist decision within [illegible] Business Days of each request;
- nominate one contact to receive and approve vendor clarification questions, and respond within [illegible] Business Days;
- provide the outputs of Phases 1 to 3 that the RFP relies on; and
- make the sponsor available for the evaluation readout session in section 4.

6.2 Assumptions. The timetable and fee assume that the number of respondents does not exceed [illegible], and that the Client does not change the requirements once the RFP is issued.

6.3 Effect of a missed dependency. If a dependency is not met, the Consultant may adjust the timetable under clause 5.5 of the Standard Terms.

SECTION 07

Acceptance and next step

7.1 Acceptance. D1 to D4 are accepted under clause 5.6 of the Standard Terms, either by written acceptance from the Client or by the lapse of the review window without notice.

7.2 Vendor decision. The Client decides whether to select a vendor or builder, and whether to contract with any respondent. That decision, and any contract, sits outside the Services under this Phase Schedule.

7.3 Stopping. The Client may stop this Phase at any time under clause 2.5 of the Standard Terms. The Client pays for Services performed and Deliverables provided to the date of notice.

SECTION 08

Tools we use

8.1 Tools. Under clause 8.4 of the Standard Terms, the Consultant will put the Client's personal information and Confidential Information only into the following third-party tools in this Phase, which the Client approves by signing this Phase Schedule:

- **Anthropic (Claude), AI assistance.** Used through Anthropic's commercial API, whose terms do not allow Anthropic to train its models on what we send. Data is kept for 30 days. Used for analysis, drafting and summaries, which the Consultant reviews.

- **Google Drive, document storage.** Each client's documents are kept in a folder of their own.
- **Airtable, contact and billing records.**
- **QuickBooks Online, invoicing and accounting.**
- **BoldSign, electronic signing** of this Phase Schedule and the Standard Terms.
- **Titan email (hosted by Hostinger), correspondence.**
- **Fireflies, recording and transcription of sessions,** used for sessions in this Phase. By signing this Phase Schedule the Client agrees in writing to its use (clause 8.3). The voice recording is deleted as soon as the transcript has been created, and the transcript is deleted from Fireflies once it has been saved to the Consultant's records.

8.2 Other tools. The Consultant will not put the Client's personal information or Confidential Information into any other third-party tool without the Client's written approval, and will tell the Client in writing before adding or changing a tool that handles it.

8.3 Recording of sessions. By signing this Phase Schedule the Client agrees in writing to the Consultant recording and transcribing sessions in this Phase using Fireflies. The Consultant will tell every participant before each recording starts. A participant who does not wish to be recorded may choose not to take part in that session. The Consultant will not use any other recording or transcription tool without the Client's separate written approval.

8.4 Records we keep. The Consultant keeps a copy of the final Deliverables and of the signed Agreement documents, including this Phase Schedule and the Standard Terms, as its record of the work done and of what was agreed (clause 8.8 of the Standard Terms).

8.5 Your information and our Privacy Policy. The Consultant's Privacy Policy, published on the Consultant's website, explains in plain words what personal information the Consultant collects, why, where it is kept, who can see it, how long it is kept, and how to ask to see, correct or delete it. The Consultant is not bound by the Privacy Act 1988 (Cth) but is guided by the Australian Privacy Principles (clause 8 of the Standard Terms). In this Phase the Consultant will: (a) collect only the information needed to do the work; (b) tell every participant before a session is recorded; (c) answer a request to see or correct information within 10 days; (d) delete working information within 30 days of the Client asking, except the records kept under clause 8.4; and (e) aim to tell the Client within 48 hours of becoming aware of a privacy incident involving its personal information that is likely to cause harm. If the Client is not satisfied with how its information has been handled, it may raise this with the Consultant in writing.

SECTION 09

Signatures

Signed by the parties' authorised representatives, or accepted electronically under clause 17.7 of the Standard Terms. By signing, the Client approves the third-party tools listed in clause 8.1 and the recording of sessions under clause 8.3.

SIGNED FOR THE CLIENT

FULL NAME	COMPANY	CAPACITY
James Hartley	Meridian Property Management	Authorised Signatory

Signature	Date

SIGNED FOR THE CONSULTANT

FULL NAME	COMPANY	CAPACITY
Travis Shaw	Intelligent Choice AI Consulting ABN 78 462 883 855	Authorised Signatory

Signature	Date