

ORIGAMI RISK ORDER FORM #
CONTACT INFORMATION

Client: Williamson County, Texas
Address: Attention: Risk Management
 301 SE Inner Loop, Georgetown, TX 78626
Primary Contact: Risk Management
Primary Contact Email: riskmanagement@wilco.org

Bill To Contact: Risk Management
Bill To Email: riskmanagement.billing@wilco.org

Is purchase order (PO) required? ☐
 Upon entering into this Order Form, please send any POs, vendor registration links or tax exemption certificates to finance@origamirisk.com

SUBSCRIPTION DETAILS

Subscription Term: 36 Months
 Effective Date: Upon the date last signed by the parties hereto

RECURRING SUBSCRIPTIONS – LICENSES

Subscription	Quantity / Functionality Purchased
RMIS	Functionality Selected
Full User(s)	5 User(s)
Enterprise-Wide Record Entry	Up to 1,000 records added per year
Certificate of Insurance Tracking	Up to 500 Insureds/Vendors tracked
Contract Management	Functionality Selected
Contract Management User	5 Special License(s)
COI User	4 Special License(s)
OCR Scanning	License Selected for reading of inbound Acord Form standard COIs
Annual Total: \$72,550.00	

RECURRING SUBSCRIPTIONS – HOSTING

Subscription	Quantity / Functionality Purchased
Hosting, Network & Storage	Up to 5,000 Claim(s), Incident(s), Policy(s), and Other Record(s)
Free File Attachment Storage	Includes 50 GBs of Searchable file storage
Annual Total: \$7,500.00	

RECURRING SUBSCRIPTIONS – DATA PROCESSING

Subscription	Quantity / Functionality Purchased
Claim Only Feed – from GB	Weekly Feed From Gallagher Bassett (no adjuster notes nor individual financial transactions)
Export of new claims to GB	Special Data Processing – 3x daily export of new claims from Origami to Gallagher Bassett
Annual Total: \$8,500.00	

RECURRING SUBSCRIPTIONS – SUPPORT

Subscription	Quantity / Functionality Purchased
Client Support Tier	Selected Client Support tier includes support resourcing based on up to 2 hours of Client Support services per month beginning on the Effective Date.
	Annual Total: \$7,500.00

Annual Fees (before discount): \$96,050.00
Discount (applied to \$96,050.00): (\$41,000.00)
Total Annual Fees: \$55,050.00

BILLING DETAILS AND ADDITIONAL TERMS

This Order Form is effective as of the Effective Date (as identified above) for the purchase of the subscription services listed above from Origami Risk LLC (“Origami”).

Origami entered into a Contract with Fort Bend County, Texas (“Fort Bend”) to provide and implement a risk management information system, dated effective as of March 12, 2022 (the “Fort Bend Contract”). Origami and Client wish to enter into this Order Form for Origami provide Client the licenses and services as set forth herein on the same terms and conditions as the Fort Bend Contract, subject to the following modifications:

1. Any reference to Fort Bend in the Fort Bend Contract shall instead be deemed to refer to Client for the purposes of this Order Form. To the extent that this Order Form conflicts with any provision of the Fort Bend Contract, the provisions of this Order Form shall govern.
2. The parties agree that this Order Form will apply to the services provided to the Client and Appendix A and B of the Fort Bend Contract shall be replaced in their entirety by this Order Form and the Statement of Work executed in connection herewith.
3. Upon mutual agreement in writing by both the Client and Origami, this Order Form may be extended or renewed after the initial three-year term.
4. **Non-Appropriation and Fiscal Funding:** This Order Form is subject to the availability of funds. It is expressly understood and agreed that the Client shall have the right to terminate this Order Form at the end of the Client's fiscal year if the governing body of the Client does not appropriate sufficient funds as determined by the Client's budget for the fiscal year in question. The Client may effect such termination by giving Origami written notice of termination at the end of its then-current fiscal year. Notwithstanding any other provision, such termination shall not constitute a default of the Order Form and shall be without penalty or further obligation to Client.

To the extent the Fort Bend Contract does not contemplate order forms, this Order Form will be deemed a Statement of Work for purposes of the Fort Bend Contract. Origami and Client agree that the term of the Fort Bend Contract shall be extended through the duration of the term of this Order Form.

Fees for each year shall be deemed fully earned upon execution of this Order Form, provided, however, that due to the implementation spread as set forth in the Statement of Work #20240515, the fees for each year shall be due as follows:

1. Upon execution of this Order Form: \$78,912 (\$23,862 in implementation fees *plus* the fees set forth in this Order Form for Year 1)
2. Annually upfront for Year 2: \$75,412 (\$20,362 in implementation fees *plus* the fees set forth in this Order Form for Year 2)
3. Annually upfront for Year 3: 67,662 (\$12,612 in implementation fees *plus* the fees set forth in this Order Form for Year 3)

To the extent that Client is a tax-exempt entity, fees shall not be subject any sales tax. In the event Client authorizes, in advance and in writing, reimbursement of non-labor expenses related to the services subject of this Order Form and/or Statement of Work, Client will pay such actual non-labor expenses in strict accordance with the Williamson County Vendor Reimbursement Policy, which is incorporated into and made a part of this Order Form as Exhibit A. Invoices requesting reimbursement for authorized non-labor expenses must be accompanied by copies of the provider's invoice and clearly set forth the actual cost of the expenses, without markup.

Service descriptions and service-specific terms and conditions are set forth at origamirisk.com/service-descriptions, which are hereby incorporated by reference in the form available at such link as of the Effective Date. Additional professional services may be set forth in other Statements of Work as agreed between the parties.

Special Product Descriptions:

1. Contract Management User - These users allow for utilization of Origami's Contract Management functionality. They have the ability to add new contracts, view/edit details, fields & file attachments. They have the ability to view dashboards and reports which have been setup for them.
2. COI User - These users allow for utilization of Origami's Certificate of Insurance (COI) functionality. They have the ability to add new vendors, view/edit details, fields & file attachments. They have the ability to view dashboards and reports which have been setup for them.

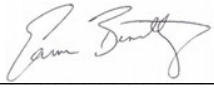



ORIGAMI RISK

ORDER FORM APPROVAL

The undersigned agree to this Order Form.

ORIGAMI RISK LLC

By:  

Name: Earnest Bentley
(Print Name)

Title: President, Risk Solutions

Date: 10/2/2024

WILLIAMSON COUNTY, TEXAS

By: _____

Name: _____
(Print Name)

Title: _____

Date: _____

EXHIBIT A

[See Attached]

Williamson County

Vendor Reimbursement Policy

The purpose of this Williamson County Vendor Reimbursement Policy ("Policy") is to provide clear guidelines to vendors on Williamson County's expectations and requirements regarding allowable reimbursable expenditures and required backup. The Policy will also minimize conflicts related to invoice payments and define non-reimbursable items. This Policy is considered a guideline and is not a contract.

This Policy may be altered, deleted or amended, at any time and without prior notice to vendors, by action of the Williamson County Commissioners Court. Unenforceable provisions of this Policy, as imposed by applicable law, regulations, or judicial decisions, shall be deemed to be deleted. Any revisions to this Policy will be distributed to all current vendors doing business with the County.

1. Invoices and Affidavits

- 1.1 Invoices must adequately describe the goods or services provided to County and include all required backup (i.e. reimbursable expenses, mileage log, timesheets, receipts detailing expenses incurred etc.) that is in a form acceptable to the Williamson County Auditor. Invoices that do not adequately describe the goods or services provided to County or contain backup that is satisfactory to the Williamson County Auditor will be returned to vendor for revisions and the provision above relating to invoice errors resolved in favor of the County shall control as to the required actions of vendor and when such invoice must be paid by the County.
- 1.2 In the event an invoice includes charges based upon hourly billing rates for services or any other rates based upon the amount of time worked by an individual or individuals in performing services, whether the charges are being billed directly to the County or whether they are the basis of invoices from subcontractors for which the vendor seeks reimbursement from the County, the charges shall be accompanied by an affidavit signed by an officer or principal of the vendor certifying that the work was performed, it was authorized by the County and that all information contained in the invoice that is being submitted is true and correct.
- 1.3 Upon County's request, vendor must submit all bills paid affidavits wherein vendor must swear and affirm that vendor has paid each of its subcontractors, laborers, suppliers and material in full for all labor and materials provided to vendor for or in connection with services and work performed for County and, further, vendor must swear and affirm that vendor is not aware of any unpaid bills, claims, demands, or causes of action by any of its subcontractors, laborers, suppliers, or material for or in connection with the furnishing of labor or materials, or both, for services and work performed for County.

2. Travel Reimbursement

- 2.1 The County will only cover costs associated with travel for vendors outside a 45-mile radius from the Williamson County Courthouse, 710 Main Street, Georgetown, Texas 78626.
- 2.2 The County will only cover costs associated with travel as documented work for County. If a vendor is also doing business for another client, the travel costs must be split in proportion to the amount of work actually performed for the County and the other client. The only allowable travel expense will be for the specific days worked for Williamson County.
- 2.3 No advance payments will be made to vendor for travel expenditures. The travel expenditure may only be reimbursed after the expenditure/trip has already occurred and vendor has provided the Williamson County Auditor with all necessary and required backup.

- 2.4 Vendors must submit all travel reimbursement requests on each employee in full. Specifically, a travel reimbursement request must include all related travel reimbursement expenses relating to a particular trip for which vendor seeks reimbursement. Partial travel reimbursement requests will not be accepted (i.e. vendor should not submit hotel and mileage one month then the next month submit rental car and airfare). If the travel reimbursement appears incomplete, the invoice will be sent back to the vendor to be submitted when all information is ready to submit in full.
- 2.5 Reimbursement for transportation costs will be at the most reasonable means of transportation (i.e.: airline costs will be reimbursed for coach rate, rental car costs will only be reimbursed if rental car travel was most reasonable means of travel as compared to travel by air).
- 2.6 The County will not be responsible for, nor will the County reimburse additional charges due to personal preference or personal convenience of individual traveling.
- 2.7 The County will not reimburse airfare costs if airfare costs were higher than costs of mileage reimbursement.
- 2.8 Additional expenses associated with travel that is extended to save costs (i.e. Saturday night stay) may be reimbursed if costs of airfare would be less than the cost of additional expenses (lodging, meals, car rental, mileage) if the trip had not been extended. Documentation satisfactory to the Williamson County Auditor will be required to justify expenditure.
- 2.9 County will only reimburse travel expense to necessary personnel of the vendor (i.e. no spouse, friends or family members).
- 2.10 Except as otherwise set forth herein, a vendor must provide a paid receipt for all expenses. If a receipt cannot be obtained, a written sworn statement of the expense from the vendor may be substituted for the receipt.
- 2.11 Sales tax for meals and hotel stays are the only sales taxes that will be reimbursed. Sales tax on goods purchased will not be reimbursed. A sales tax exemption form is available from the Williamson County Auditor's Office upon request.
- 2.12 The County will not pay for any late charges on reimbursable items. It is the responsibility of the vendor to pay the invoice first and seek reimbursement from the County.

3. Meals

- 3.1 Meal reimbursements are limited to a maximum of \$59.00 per day on overnight travel. On day travel (travel that does not require an overnight stay), meal reimbursements are limited to a maximum of \$25.00 per day. The travel must be outside the Williamson County Courthouse, 710 Main Street, Georgetown, Texas 78626 by a 45-mile radius.
- 3.2 Receipts are required on meal reimbursement amounts up to the maximum per day amount stated for overnight or day travel. If receipts are not presented, the vendor can request per diem (per diem limits refer to 3.2). However, a vendor cannot combine per diem and meal receipts. Only one method shall be allowed.
- 3.3 Meals are reimbursable only to vendors who do not have necessary personnel located within a 45-mile radius of the Williamson County Courthouse, 710 Main Street, Georgetown, Texas 78626, who are capable of carrying the vendor's obligations to the County. Meals will not be reimbursed to vendors who are located within a 45-mile radius of the Williamson County Courthouse.
- 3.4 County will not reimburse for alcoholic beverages.
- 3.5 Tips are reimbursable but must be reasonable to limitation of meal allowance
- 3.6 No meals purchased for entertainment purposes will be allowed.
- 3.7 Meal reimbursement must be substantiated with a hotel receipt.

4. Lodging

- 4.1 Hotel accommodations require an itemized hotel folio as a receipt. The lodging receipt should include name of the motel/hotel, number of occupant(s), goods or services for each individual charge (room rental, food, tax, etc.) and the name of the occupant(s). Credit card receipts or any other form of receipt are not acceptable.
- 4.2 Vendors will be reimbursed for a single room rate charge plus any applicable tax. If a single room is not available, the vendor must provide documentation to prove that a single room was not available in order to justify the expense over and above the single room rate. A vendor may also be required to provide additional documentation if a particular room rate appears to be excessive.
- 4.3 Personal telephone charges, whether local or long distance, will not be reimbursed.

5. Airfare

- 5.1 The County will only reimburse up to a coach price fare for air travel.
- 5.2 The County will exclude any additional charges due to personal preference or personal convenience of the individual traveling (i.e. seat preference charges, airline upgrades, etc. will not be an allowable reimbursement)
- 5.3 Air travel expenses must be supported with receipt copy of an airline ticket or an itinerary with actual ticket price paid. If tickets are purchased through a website, vendor must submit a copy of the webpage showing the ticket price if no paper ticket was issued.
- 5.4 Cancellation and/or change flight fees may be reimbursed by the County but vendor must provide the Williamson County Auditor with documentation in writing from a County department head providing authorization for the change.
- 5.5 The County will not reimburse vendor for tickets purchased with frequent flyer miles.

6. Car Rental

- 6.1 Vendors that must travel may rent a car at their destination when it is less expensive than other transportation such as taxis, airport shuttles or public transportation such as buses or subways.
- 6.2 Cars rented must be economy or mid-size. Luxury vehicle rentals will not be reimbursed. Any rental costs over and above the cost of a mid-size rental will be adjusted.
- 6.3 Vendors will be reimbursed for rental cars if the rental car cost would have been less than the mileage reimbursement cost (based on the distance from vendor's point of origin to Williamson County, Texas) had the vendor driven vendor's car.
- 6.4 Vendors must return a car rental with appropriate fuel levels as required by rental agreement to avoid the car rental company from adding fuel charges.
- 6.5 Rental agreement and credit card receipt must be provided to County as back up for the request for reimbursement.
- 6.6 Insurance purchased when renting vehicle may also be reimbursed.
- 6.7 Car Rental optional extras such as GPS, roadside assistance, and administrative fees on Tolls will not be reimbursed.

7. Personal Car Usage

- 7.1 Personal vehicle usage will be reimbursed in an amount equal to the standard mileage rate allowed by the IRS.
- 7.2 Per code of Federal Regulations, Title 26, Subtitle A, Chapter 1, Subchapter B, Part IX, Section 274(d), all expense reimbursement requests must include the following:
 - 7.2.1.1 Date
 - 7.2.1.2 Destination
 - 7.2.1.3 Purpose

- 7.2.1.4 Name of traveler(s)
- 7.2.1.5 Correspondence that verifies business purpose of the expense
- 7.3 The mileage for a personal vehicle must document the date, location of travel to/from, number of miles traveled and purpose of trip.
- 7.4 Mileage will be reimbursed on the basis of the most commonly used route.
- 7.5 Reimbursement for mileage shall not exceed the cost of a round trip coach airfare.
- 7.6 Reimbursement for mileage shall be prohibited between place of residence and usual place of work.
- 7.7 Mileage should be calculated from employee's regular place of work or their residence, whichever is the shorter distance when traveling to a meeting or traveling to Williamson County, Texas for vendors who are located outside of the Williamson County Courthouse, 710 Main Street, Georgetown, Texas 78626 by at least a 45-mile radius.
- 7.8 When more than one person travels in same vehicle, only one person may claim mileage reimbursement.
- 7.9 Tolls, if reasonable, are reimbursable. Receipts are required for reimbursement. If a receipt is not obtainable, then written documentation of expense must be submitted for reimbursement (administrative fees on Tolls will not be reimbursed).
- 7.10 Parking fees, if reasonable are reimbursable for meetings and hotel stays. For vendors who contract with a third party for visitor parking at vendor's place of business, Williamson County will not reimburse a vendor based on a percentage of its contracted visitor parking fees. Rather, Williamson County will reimburse Vendor for visitor parking on an individual basis for each time a visitor uses Vendor's visitor parking. Receipts are required for reimbursement. If a receipt is not obtainable, then written documentation of expense must be submitted for reimbursement.
- 7.11 Operating and maintenance expenses as well as other personal expenses, such as parking tickets, traffic violations, and car repairs and collision damage are not reimbursable.

8. Other Expenses

- 8.1 Taxi fare, bus tickets, conference registrations, parking, etc. must have a proper original receipt.

9. Repayment of Non-reimbursable Expense.

Vendors must, upon demand, immediately repay County for all inappropriately reimbursed expenses whenever an audit or subsequent review of any expense reimbursement documentation finds that such expense was reimbursed contrary to these guidelines and this Policy. Williamson County reserves the right to retain any amounts that are due or that become due to a vendor in order to collect any inappropriately reimbursed expenses that a vendor was paid.

10. Non-Reimbursable Expenses

In addition to the non-reimbursable items set forth above in this Policy, the following is a non-exhaustive list of expenses that will not be reimbursed by Williamson County:

- 10.1 Alcoholic beverages/tobacco products
- 10.2 Personal phone calls
- 10.3 Laundry service
- 10.4 Valet service (excludes hotel valet)
- 10.5 Movie rentals
- 10.6 Damage to personal items
- 10.7 Flowers/plants

- 10.8 Greeting cards
- 10.9 Fines and/or penalties
- 10.10 Entertainment, personal clothing, personal sundries and services
- 10.11 Transportation/mileage to places of entertainment or similar personal activities
- 10.12 Upgrades to airfare, hotel and/or car rental
- 10.13 Airport parking above the most affordable rate available
- 10.14 Excessive weight baggage fees or cost associated with more than two airline bags
- 10.15 Auto repairs
- 10.16 Babysitter fees, kennel costs, pet or house-sitting fees
- 10.17 Saunas, massages or exercise facilities
- 10.18 Credit card delinquency fees or service fees
- 10.19 Doctor bills, prescription and other medical services
- 10.20 Hand tools
- 10.21 Safety Equipment (hard hats, safety vests, etc.)
- 10.22 Office Supplies
- 10.23 Lifetime memberships to any association
- 10.24 Donations to other entities
- 10.25 Any items that could be construed as campaigning
- 10.26 Technology Fees
- 10.27 Sales tax on goods purchased
- 10.28 Any other expenses which Williamson County deems, in its sole discretion, to be inappropriate or unnecessary expenditures.

STATEMENT OF WORK # [REDACTED]

This Statement of Work ("SOW") describes services to be performed by Origami Risk LLC ("Origami") for Williamson County, Texas ("Client"). Capitalized terms used herein shall have the meanings set forth in the Fort Bend Contract.

WHEREAS, Origami entered into a Contract with Fort Bend County, Texas ("Fort Bend") to provide and implement a risk management information system, dated as of April 5, 2022 (the "Fort Bend Contract"); and

WHEREAS, Origami and Client wish to enter into an agreement for Origami to provide Client with the Service as set forth in this SOW on the same terms and conditions as the Fort Bend Contract.

MODIFICATIONS TO FORT BEND CONTRACT

1. Any reference to Fort Bend in the Fort Bend Contract shall instead be deemed to refer to Client for the purposes of this SOW. To the extent that this SOW conflicts with any provision of the Fort Bend Contract, the provisions of this SOW shall govern.
2. The parties agree that this SOW will apply to the services provided to the Client and Appendix A and B of the Fort Bend Contract shall be replaced in their entirety by this SOW and the Order Form executed in connection herewith.
3. The following provisions are included:
 - a. Texas Prompt Payment Act Compliance: Payment for goods and services shall be governed by Chapter 2251 of the Texas Government Code. Interest charges for any overdue payments shall be paid by Customer in accordance with Texas Government Code Section 2251.025.
 - b. County's Right to Audit: Origami agrees that Customer or its duly authorized representatives shall, until the expiration of three (3) years after final payment under this Contract, have access to and the right to examine and photocopy any and all financial records of Origami which are directly pertinent to the services to be performed and amounts expended under this Agreement for the purposes of making audits, examinations, excerpts, and transcriptions. Origami agrees that Customer shall be provided such documentation in accordance with the preceding sentence via electronic format.
 - c. Venue: The parties hereto acknowledge that venue is proper in Williamson County, Texas, for all legal actions or proceedings arising out of or relating to this Contract and waive the right to sue or be sued elsewhere.
 - d. Non-Appropriation and Fiscal Funding: This SOW is subject to the availability of funds. It is expressly understood and agreed that the Client shall have the right to terminate this SOW at the end of the Client's fiscal year if the governing body of the Client does not appropriate sufficient funds as determined by the Client's budget for the fiscal year in question. The Client may effect such termination by giving Origami written notice of termination at the end of its then-current fiscal year. Notwithstanding any other provision, such termination shall not constitute a default of the SOW and shall be without penalty or further obligation to Client.

OVERVIEW

This SOW sets forth the Professional Services to conduct the implementation of the Service. The term of this SOW shall begin on the Effective Date as set forth in the Order Form # [REDACTED] and continue until Go-Live of the Service (as defined below).

This SOW does not include subscriptions to the Service. All subscriptions and associated fees are set forth in a separate Order Form between the parties.

Client will be using the Origami Risk solution for intake of new incident reporting and forwarding of claims which will be handled to Client's TPA, Gallagher Bassett Services, Inc. ("GB"). There is no in house claims administration needed in this SOW.

Origami will be setting up a web portal for field based reporting of new incidents. Client will be using Origami's standard out of the box features for basic claims management/oversight, to include tasks/diaries, notes, emails, contacts, file attachments.

Client will also be using the system for Contract Management as well as review of inbound Certificate of Insurance (COI) tracking to ensure vendor compliance with County insurance requirements. The OCR license functionality to read inbound COIs is included and will support OCR reading of standard Acord forms.

Origami will setup the portal to include the ability for County employees to submit new contracts for review, thereby giving the County a uniform fashion of submitting contracts and processing the appropriate review workflows. For Contract Management, some of Client's contracts currently flow through the Bonfire system. While an interface with Bonfire is not included in this SOW, Client may elect to add this interface to import contracts and contract details at a later date if so elected by Client. For this SOW, Client will drag & drop or upload contracts and key in vendor/contract details to utilize the Origami contract management solution.

Client utilizes the services of GB as their Third Party Administrator (TPA) who handles claims. There will be an export of new claims which goes to GB and a feed back from GB to provide Origami with regular updates on claims. Client has old claims data with Legacy Carriers to which Origami will provide up to 40 hours of spreadsheet work in this SOW to provide Client with spreadsheet import templates which will allow Client to self-service import claim information or Client can key in claims information directly into Origami on these legacy claims.

From a historical/current data standpoint, Client will be using Origami fresh starting forward and will have the ability to key in historical information or use self-service import tools to import historical data. Or should Client wish to have Origami import some historical data/contracts, they can elect to utilize available professional service hours to ask Origami to do so.

IMPLEMENTATION

Implementation Process

Implementation is the process of configuring the Service for use by Client including system settings, supporting Client in loading data, initial user training, and other work identified in this section of the SOW. The implementation phase is completed when Client is able to utilize the Service platform for the purposes contemplated by the implementation tasks set forth below in this SOW, referred to by Origami as being Live in the system. Origami will manage the overall implementation process, including scheduling and leading meetings, communicating with the team, follow up documentation, and maintaining the project schedule through the Go-Live date. Once Origami moves Client from its staging environment to its live production environment, any additional use of Origami's staging environment after Go-Live will incur additional hosting fees.

Client's provision of timely and accurate specifications, direction and feedback is essential to the implementation. Both parties understand that time is of the essence with regard to the implementation and agree to use reasonable and good faith efforts to promptly complete the implementation.

Origami provides fixed price implementations based on (i) reasonable estimates from Client to complete the deliverables as scoped in this SOW and (ii) Client's continued and uninterrupted effort toward Go-Live. Any voluntary project interruptions or stoppages ordered by Client outside of the project plan or any failures by Client to meet the obligations above will result in the conversion of the implementation to a time and expense engagement, effective upon email notice from Origami to Client and billed monthly as incurred at Origami's bundled hourly rate set forth below after crediting Client for any remaining unused portion of the fixed price.

Service Implementation

Based on conversations with the Client, Origami estimates that it will need to provide 643 hours of professional services for the implementation deliverables set forth in this SOW (including, without limitation, training and project management hours). If there are any changes to the scope of such deliverables, the parties will agree to meet and negotiate in good faith an amendment to this SOW to resolve any issues and to address any additional requirements. The implementation services will include the following:

Origami will:

- Develop the incident forms for Auto Liability, Auto Physical Damage, General Liability, Property
- Mirror the screen design layouts to Claim Form layouts for Auto Liability, Auto Physical Damage, General Liability, Property
- Deploy the standard Origami Mobile App, which Client can download to supported iOS and Android devices. Origami will mirror the incident forms identified above to mobile format.
- Deploy Origami's standard Claims Management/Oversight tools to include tasks (diary function), notes, email function, contact management and file attachments. (No in house claims administration functionality needed)
- Configure one (1) Portal with separate action buttons for (a) incident intake processing from the field and (b) allows for Contracts for review submissions
- Deploy Origami's standard Location form layout and provide a one-time import of Client's Locations
- Dashboards - Provide access to Origami's standard Dashboard modules and spend up to 20 hours to configure default dashboards using standard Origami dashboard widgets*
- Reports - Deploy Origami's standard report module to include report templates, custom template and ad-hoc report writing capabilities. Origami to spend up to 20 hours to configure Client's desired reports using standard Origami RMIS templates and/or the custom template design tool*
- Workflow - Provide access to Origami's standard Data Entry Event functionality and spend up to 20 hours to configure Client's events with corresponding system actions (workflow alerts, notifications and process automation) *
- Deploy Origami's standard Certificate of Insurance functionality and allow for tweaks to screen design of data points collected on the Insured's (Vendor) Details
- Deploy Origami's standard OCR functionality which allows for reading of inbound Acord Certificate of Insurance forms
- Configure up to 5 Certificate Insured Profiles (which serve as the basis of what that COI is being measured against for compliance)
- Deploy Origami's standard Contract Management functionality with out of the box fields within Contract Details to manage data points related to contracts
- Deploy Origami's standard Mail-Merge functionality and spend up to 10 hours to create mail-merge templates for Client *
- Configure 3 User Security Profiles (COI user, Contract Mgt user, Full user)
- Spend up to 40 hours to configure Excel Import templates for Client's historical claims data that is with historical carriers to allow for Client self-service imports of claims information. (Note – Client understands that excel import template tools do not replace all the benefits of receiving an automated interface directly from Carriers, but this is a cost-effective work around to get basic claim details into the Origami system. Client will decide whether to use the import templates or key updates into the system for those carriers with minimal claims/updates to be made.)

*In the event that additional hours in excess of the hours allocated herein are needed to complete the implementation deliverable, the parties may enter into a separate amendment or statement of work to purchase such additional hours.

Client will:

- Provide specifications, direction, and feedback as needed by Origami in a timely manner.
- Configure additional default dashboards, fields, forms, user roles, distribution lists, reports and other features as needed by Client.
- Mobile App - Be responsible for assisting their users with downloading and installing the mobile application onto their mobile devices for those utilizing the mobile app for reporting incidents.

Convert Legacy System/Data - not applicable

Client has no current system and there is no historical data to be uploaded by Origami in this SOW.

Client intends to key-in & drag and drop file attachments of their own open contracts, COIs, Vendors, data over time using on-screen system records and (as able/applicable) self-service tools.

Loading Carrier / TPA Claims Data for Data Processing - not applicable

Origami will:

- Provide Client with text for data request letters suitable for requesting necessary data for Weekly Claims feed from GB
- Convert and load the initial system data from GB and weekly updates

Client will:

- Arrange for weekly claims only feed (no individual financial transactions nor adjuster notes) data to be sent to Origami from GB

Configuring Automated Interfaces, Imports & Extracts To / From 3rd Party Systems

This SOW is inclusive of an export interface of newly reported claims from Origami to Client's TPA – Gallagher Bassett

Origami will:

- Configure Origami's standard claims export to provide newly reported claims to GB. This export will occur up to 3x daily to send new claims to GB for their claims handling.

Client will:

- Provide contact information for TPA, Gallagher Bassett
- Provide any mapping requirements (if applicable)

Configuration of Incident Intake Process

Origami will:

- Configure the Enterprise Portal Data Entry Screens to accurately mirror Client's existing process (with below improvements)
- Build the workflow in the Service for proper email notification, mail merge document distribution and task creation according to Client's business rules.

Client will:

- Provide screen shots of existing intake forms currently in use.
- Work with Origami to identify opportunities to improve on current intake forms and process.
- Specify the workflows and individuals required for event triggered emails, tasks and mail merge

Training

Origami will:

- Provide up to 24 hours of training to Client during the implementation period set forth in this SOW. Client Support hours will be eroded for training following this implementation period. Training will be provided at Client offices or online at Client's request. Training can be provided in one session or several on mutual agreement between Client and Origami. Travel & Expenses associated with any on-site training will be pre-approved by Client and billed as incurred.

Client will:

- Provide Origami with guidance about the employees to be trained and any training requirements or a preferred approach.
- If training is to be provided in Client office, provide appropriate meeting space and internet access so Origami can perform the training and also provide for transportation and other expenses for Client employees who attend the training.

Project Management

Origami is founded on a set of **ITERATIVE** processes from top to bottom. These contemporary tenets are the foundation of Origami's ability to deliver better service and faster and more accurate implementations. Origami also maintains a set of best practices, tools and experts for our clients who require a more **TRADITIONAL** approach to managing their implementation project. The selection below indicates the project management model included within this SOW:

This SOW includes:

[Included] Iterative Project Management

[Not Included] Traditional Project Management

Iterative Project Management - Included

Origami will:

- Schedule and lead initial kickoff call or meeting
- Maintain schedule with key deliverables and expected dates
- Lead status calls twice per month
- Maintain project status document containing priority list, open items and changes which may impact timeline
- Coordinate all activity within Origami to complete Origami's tasks on the project schedule and assign project management as shared role of team members
- The Service's administrative tools and screens serve as documentation of the implementation for Client's System Administrator to reference.

Client will:

- Participate in status calls and working meetings
- Coordinate all activity within Client's organization to complete Client's tasks on the project schedule
- Coordinate all activity of Client's 3rd party providers required to complete tasks on the project schedule

Traditional Project Management – Not Included

If included, in addition to the responsibilities listed in Iterative Project Management above, Origami will designate a Project Manager to provide a specified number of hours of project management during the Implementation. This Project Manager will (1) manage the Origami tasks listed in Iterative Project Management above, (2) coordinate meetings and discussions with stakeholders as needed to maintain project progress, and (3) maintain a library of written artifacts and documentation including:

- | | |
|--|--|
| ○ Formal project kickoff agenda | ○ On site agendas |
| ○ Communication plan | ○ Change control management |
| ○ Formal stakeholder analysis | ○ Executive steering committee status call agenda (as needed) |
| ○ Project charter | ○ Origami governance decision management document |
| ○ Collaboration website | ○ UAT test plan for critical items (dependent on Client input and test cases provided) |
| ○ Detailed work breakdown structure | ○ Executive project dashboard |
| ○ Weekly project status calls, agenda, meeting notes | ○ Lessons learned analysis |
| ○ Detailed issues and risks log | |
| ○ Action items list | |
| ○ Detailed project plan | |

Client Roles and Responsibilities

- Client will designate, prior to the start of the implementation, a single point of contact who shall be responsible to coordinate and manage all activities required within Client's organization and make decisions on behalf of Client. This single point of contact may be changed at any time upon Client's notice to Origami.
- Client will designate, prior to the start of this engagement, at least one System Administrator ("Client SA") who will be responsible for working with Origami to implement the Service and maintain the Service thereafter, and who will provide ongoing production support to Client's users, both internal and external. Client SAs will be responsible for setting up and assigning security rights and maintaining user IDs for all users. Client SAs will have sufficient knowledge, skills and abilities to perform their identified project roles.
- Client will provide requested information within a reasonable timeframe as agreed upon by Client and Origami; if providing the requested information is not achievable or will take longer than preferred, Client will promptly inform Origami of the situation and alternative solutions will be determined.
- Client will help resolve project issues and assist with bringing issues to the attention of the appropriate persons within the organization, as required.
- Client will be primarily responsible for obtaining information and resolving any issues pertaining to third party products or services used by Client, if necessary.
- Client agrees generally to provide other reasonable assistance and cooperation to see that services are successfully completed.
- For any deliverables that Origami provides to Client for approval, Client will confirm approval or provide necessary details on any requested remediation promptly unless otherwise agreed between the parties.
- Client will be responsible for testing and quality assurance related to the implementation to ensure that all configurations and customizations operate as intended (including functionality, usability and data access rights), and Origami shall not be responsible for any damages caused by any such configurations or customizations.
- Client will have final responsibility for decisions regarding all configurations and customizations (such as forms, dashboards, interfaces, reports, workflows and data flows) created by or for Client or Client's users in the Service.
- At the conclusion of the implementation as set forth herein, Client agrees to use good faith efforts to respond to any Origami questionnaire or other request for feedback.

Marketing Terms

- A. Unless expressly prohibited in writing by Client, Origami may use Client's name, logo, and any testimonials/quotes in Marketing and Sales materials (including the Origami website).
- B. Upon Origami's request, Client will cooperate in good faith with Origami in conducting case studies or in drafting a press release.

PRICING AND INVOICE SCHEDULE

The fees for the professional services set forth in this SOW is \$56,836.00 (the "Fees")

Fees for the Professional Services will be earned upon the following schedule:

Milestone	Timing	Amount
Project Initiation Steps to include Origami team assignments and formal project kick-off	Earned upon the earlier of the completion of the task or two (2) months from Contract Effective Date	\$10,000
Completion of Incident Form Design	Earned upon the earlier of the completion of the Incident Forms	\$15,000

	being designed or five (5) months from Contract Effective Date	
Certificate of Insurance (COI) Functionality configured	Earned upon the earlier of the completion of the COI functionality configured or six (6) months from Contract Effective Date	\$15,000
Contract Management Functionality configured	Earned upon the earlier of the completion of the Contract Management Functionality configured or eight (8) months from Contract Effective Date	\$10,000
Formal Project Go-Live	Earned upon the earlier of achieving Go-Live as defined in this document or eleven (11) months from Contract Effective Date	\$6,836

The fees will be deemed earned in accordance with the the above schedule; provided, however, that to accommodate for Client's budgetary constraints, Origami is amenable to spreading such Fees over the term of the contract. Such earned Fees will be due as follows:

1. Upon execution of this SOW: \$23,862
2. Annually upfront for Year 2: \$20,362
3. Annually upfront for Year 3: \$12,612



If needed, additional professional services can be purchased through a separate statement of work. All fees are subject to state sales tax, where applicable. All travel costs and expenses will be pre-approved by Client in writing and billed to Client as incurred.



STATEMENT OF WORK APPROVAL

The undersigned agree to this Statement of Work.

ORIGAMI RISK LLC

By:   _____

Name: Earnest Bentley
(Print Name)

Title: President, Risk Solutions

Date: 10/2/2024

WILLIAMSON COUNTY, TEXAS

By: _____

Name: _____
(Print Name)

Title: _____

Date: _____