

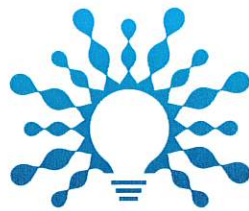
AUDIT AWARE

INSIGHTS • ACCURACY • INTELLIGENCE

Digital Canvas Proposal

Prepared for Chatham County, NC

Jan 23, 2024



REASON

— CONSULTING —

<https://reason.consulting>

This Statement of Work is a proposal for services between **Reason Consulting Corporation** of Charlotte, North Carolina ("Reason Consulting") and **Chatham County, NC** (the "Client") for the provision of data and software services, including a software as a service application used to manage audits and communicate information between the Client and taxpayers. Reason Consulting provides expertise in the audit process, but also the most secure and transparent management platform offered on the market.

1. Overview

Reason Consulting is proposing to provide data and software services under our Audit Aware platform, for the purpose of providing additional information on business entities operating in the jurisdiction. The Client will have access to both the Digital Canvas Business Insights platform and Case Manager, both components of the Audit Aware environment. The Client agrees to abide by all terms and conditions, privacy policies, and other policies that are provided on the Audit Aware site and associated sites (<https://auditaware.app>).

2. Services

Reason Consulting will provide access to Digital Canvas and Case Manager software systems on a per license basis, and perform all necessary data services to provide full functionality to the systems. Reason Consulting will also provide ongoing training and support for the duration of the engagement. The standard components for these services are as follows:

- A. **Data.** The Client will provide to Reason Consulting a source entity file, such as a list of businesses, properties, or individuals and a real property parcel file each year of the project. Reason Consulting will clean, compile, and augment this source data for the Client's use in the Digital Canvas software.
- B. **Digital Canvas.** Reason Consulting will provide access, training, and support to the Client to use the Digital Canvas platform. Support and training will be generally available 8am to 5pm EST Monday through Friday. Digital Canvas is accessible 24x7x365.
- C. **Case Manager.** Reason Consulting will provide access, training, and support to the Client to use the Case Manager platform to track, manage, and store information related to any audit process the Client elects to pursue. Support and training will be generally available 8am to 5pm EST Monday through Friday. Case Manager is accessible 24x7x365.

3. Case Manager

Case Manager is an audit management tool. It contains several components to help ensure that audit projects are consistent, accurate, transparent, and efficient. We also focus on **data security** as a core tenet of the software. This section briefly describes the overview of Case Manager and the core tools to use for a successful audit program.

- A. **User Management.** Case Manager allows your organization to manage users in a hierarchy, with accounts related to organizational administration, audit managers, auditors, and outside consultants. Each role can be tailored to adjust the assignment of audit cases as well as access to information.
- B. **Flexibility.** Use Case Manager to manage one or many types of audits simultaneously in a single organization account. You can customize the audit type as well as workflows for each audit type; what documents are required, when to contact the audit subject, how to calculate, keep copies of correspondence, and many other features to enhance and standardize the audit process.
- C. **Process Management.** Case Manager allows you to design and enforce the audit process for standardization, equal treatment, and accuracy. Case Manager also allows you to have insight into every audit, its progress, and every auditors performance, even your contractors!
- D. **Visibility.** Case Manager gives you insight into the details of every audit, but also where everything sits in all of your audit programs. See instantly the performance of your audit program, its impacts, potential challenges, and individual and team performance.
- E. **Data Security.** Never let sensitive data outside of your operational control. All data is housed in a secure redundant environment with many levels of encryption. All access is monitored, logged, and permissions are controlled on the user identity level. Every transaction with an audit subject is conducted through secure private channels so that data stays safe with a direct chain of custody. Information security is priority one with Case Manager.

Reason Consulting will provide access to the Audit Aware™ Case Management Software as a Service (SaaS) platform ("case.auditaware.app") according to the Terms and Conditions, Privacy Policy, Cookie Policy, Acceptable Use Policy, and other agreements as provided on the website <https://auditaware.app>, and in this Statement of Work or any resulting contract.

- D. **Access.** Reason Consulting will provide access to Audit Aware™ Case Manager for the number of licensed end users listed below. A license has an associated email address used to identify a single user of the site. Client agrees to manage the user accounts and licenses to ensure that only a single user has access to the email address utilized for the provided license, and agrees that sharing of log-in credentials is strictly prohibited.
- E. **Support.** Reason Consulting will use reasonable methods to provide technical support to the Client end-users. This support includes training and continuous development to

improve the Audit Aware™ Case Manager experience. Support personnel will generally be available 8am to 5pm EST Monday through Friday. Contact information will be provided as well as a Service Level Agreement.

- F. **Connectivity.** Audit Aware™ Case Manager is a Software as a Service application and this Statement of Work is for one or more user licenses of the software. Connection to the software is the responsibility of the Client. Reason Consulting will not provide support for internet connectivity, hardware, or other issues that exist in the Client's operating environment.

Browser Support. All Reason Consulting software as a service products can be accessed using a Chromium based browser within one release of the current version.

4. Digital Canvas: Business Insights

Digital Canvas is a business discovery tool. It contains several components to help identify unknown businesses (“new”), closed businesses, and data errors in the source file. We also focus on data augmentation as a value added service, providing better contact information, and information about the business itself. This section briefly describes the overview of Business Insights and the core tools to use for a successful audit program.

- A. **User Management.** Each user, as provided by an individual user license, has access to the Digital Canvas software and all of the data contained therein. Each user can use the provided tools to research businesses and business locations as well as create cases in Case Manager.
- B. **Types.** Each business will appear with an associated type: “New” businesses are business locations that Reason Consulting’s algorithm found which did not appear in the source data; “Closed” businesses are on the source list but our algorithm found sufficient data to indicate the business is no longer there; and, “Review” businesses are ones that our algorithm identified as having some data quality issue in the source data.
- C. **Optional Types.** Two optional type assignments exist: “Field Review” is used to indicate if the business should be physically examined; and, “Dismiss” is used to eliminate a business location from the list and any further review.
- D. **Mobile Versions.** Digital Canvas is provided additionally in mobile applications built for Android and iOS environments. These allow use of GPS and the device’s native camera features to help collect additional information.

5. CAVS

CAVS (<https://cavsapp.com>) is the best way to estimate the value of personal property owned by a business. Our models are based on extensive research, and values derived from current pricing sources. Our algorithm adjusts quantities based on employee concentration, and we give you the ability to custom tailor these estimates to your personal knowledge.

6. Term

The terms presented herein begin on **February 21, 2024** and continue for a period of 12 months.

7. Fees

- A. **Fee for Service.** The fees for business audit services are due and payable upon delivery of access to Audit Aware by Client's assigned users and data augmented and loaded for use in Digital Canvas. Invoices are net 30 days and may be paid by check or ACH.

- Blank on Purpose -

8. Pricing Matrix

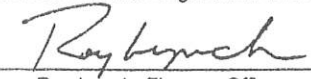
Case Manager				
	Annual Fee	Quantity	Discount	Total
	\$ 1,800	1	0%	\$ 1,800
CAVS				
	Annual Fee	Quantity	Discount	Total
	\$ 1,000	1	0%	\$ 1,000
Digital Canvas				
	Annual License Fee	Quantity	Discount	Total
Base License	\$ 11,850.00	1	10%	\$ 10,700
			Total	\$ 12,500

THUS, this agreement has been executed by the Parties below:

Mark C Cooke 02.09.2024
 Mark Cooke Date
 CEO
 Reason Consulting

 2/5/24
 Dan LaMontagne Date
 County Manager
 Chatham County

This instrument has been pre-audited in the manner required
 by the Local Government Budget and Fiscal Control Act.


 Roy Lynch, Finance Officer