

**AMENDMENT NO. 5
TO THE
2017 MASTER SERVICES AGREEMENT
REGARDING
DATA RETENTION, PURGING & ANONYMIZATION
AND
IVRNET SMS INTEGRATION**

THIS AMENDMENT NO. 5 to the 2017 Master Services Agreement (hereinafter "Amendment No. 5") by and between the City of Columbia, Missouri (hereinafter "Client"), and N. Harris Computer Corporation, on behalf of its division, Advanced Utility Systems (hereinafter "Consultant"), is entered into on the date of the last signatory noted below (the "Effective Date"). Client and Consultant are each individually referred to herein as a "Party" and collectively as the "Parties".

WHEREAS, on August 6, 2014, Client and Consultant entered into a separate Master Software License Agreement ("Software Agreement"), Master Software Implementation Services Agreement ("Services Agreement"), and Master Software Support and Maintenance Agreement ("Support and Maintenance Agreement") as part of the license of the CIS Infinity software by Consultant to Client;

WHEREAS, on April 20, 2017, Client and Consultant entered into the Master Services Agreement as part of services related to implementation of Infinity.Link and Infinity.Mobile regarding utility billing;

WHEREAS, on July 7, 2017, Client and Consultant entered into Amendment No. 1 to the 2017 Master Services Agreement expanding the scope of work to include additional services regarding the implementation of Infinity.Link Version 4 and Infinity.Mobile, and to amend the cost not to exceed amount;

WHEREAS, on February 20, 2020, Client and Consultant entered into Amendment No. 2 to the 2017 Master Services Agreement expanding the scope of work to include services regarding the Community Solar Program, and to amend the cost not to exceed amount;

WHEREAS, on September 14, 2020, Client and Consultant entered into Amendment No. 3 to the 2017 Master Services Agreement expanding the scope of work to include modification of budget billing payment plan calculations, and to amend the cost not to exceed amount;

WHEREAS, on July 3, 2024, Client and Consultant entered into Amendment No. 4 to the 2017 Master Services Agreement expanding the scope of work to include additional services regarding bilingual utility bill prints and notices; and

WHEREAS, Client and Consultant desire to enter into Amendment No. 5 expanding the scope of work to include data retention, purging, and anonymization; and to include integration

with IVRNet to support outbound customer communications across multiple channels including - SMS (Text messaging), Voice (IVR/Outbound calls), and Email Notifications on CIS Infinity release 4.1.67.

AMENDMENTS

NOW, THEREFORE, in consideration of the mutual covenants set out herein, the Parties agree to further amend the Master Services Agreement, consistent with paragraphs 3.2 and 6.17 of the Master Services Agreement, as follows:

1. Exhibit A, attached to the Master Services Agreement shall be supplemented to include Consultant's quote dated May 27, 2026, with Reference Number AT109988, regarding Data Retention, Purging & Anonymization; and shall be supplemented to include Consultant's quote dated May 14, 2026, with Reference Number AT126957, regarding IVRNet SMS Integration.
2. Paragraph 6.30, Costs Not to Exceed, of the Master Services Agreement is hereby amended by adding the following sentences to the end of the Section:

In addition, for the Data Retention, Purging & Anonymization project contemplated in Amendment No. 5 to the 2017 Master Services Agreement, total payment for Scope of Work and all other expenses and costs to the Client for services related to Data Retention, Purging & Anonymization (as detailed in Consultant's quote dated May 27th, 2026) and attached to Amendment No. 5, shall not exceed **Thirty-Eight Thousand Two Hundred Fifty Dollars and No Cents (\$38,250.00)**.

In addition, for the IVRNet SMS Integration project contemplated in Amendment No. 5 to the 2017 Master Services Agreement, total payment for the Scope of Work and all other expenses and costs to the Client for services related to IVRNet SMS Integration (as detailed in Consultant's quote dated May 14, 2026) and attached to Amendment No. 5, shall not exceed **Fifty-One Thousand Two Hundred Fifty Dollars and No Cents (\$51,250.00)**.

3. The terms and conditions of the Master Services Agreement are modified by this Amendment No. 5 as specifically set forth herein. All other terms of the Master Services Agreement, as previously amended, shall remain unchanged and in full force and effect.

[SIGNATURES ON FOLLOWING PAGE]

IN WITNESS WHEREOF, the Parties hereto have executed this Amendment No. 5 by their duly authorized representatives as of the date of the last signatory below.

CITY OF COLUMBIA, MISSOURI

By: _____
De'Carlon Seewood, City Manager

Date: _____

ATTESTED BY:

Sheela Amin, City Clerk

APPROVED AS TO FORM:

Nancy Thompson, City Counselor/ek

CERTIFICATION: I hereby certify that this Master Services Agreement, as amended, is within the purpose of the appropriation to which it is to be charged, Account Number 07010923-504990, 17410923-504990, 55506310-504990, 55706510-504990, 55806610-504990, 67601070-504990, and that there is an unencumbered balance to the credit of such appropriation sufficient to pay therefor.

By: _____
Matthew Lue, City Director of Finance

N. HARRIS COMPUTER CORPORATION

By: Mark David Wilkinson

Printed Name: Mark Wilkinson

Title: Executive Vice President

Date: July 2, 2026

ATTEST:

By: _____

Name: _____

DESCRIPTION OF ATTACHED DOCUMENT

Title or Type of Document: Certificate of Acknowledgement

Document Date: 07/02/2026

Number of Pages (including notarial certificate): 4

State of Nevada

County of Clark

This instrument was acknowledged before me
on 07/02/2026 by Mark David Wilkinson.



Jennifer Elizabeth Luna
NOTARY PUBLIC
STATE OF NEVADA
Appt. No. 24-6949-01
Expires November 20, 2027

Notarized remotely using audio-video communication technology via Proof.

Client	Columbia Utilities	Client Contact	Ricki Jones
Quote Effective Date	May 27, 2026	Prepared By	Tanuja Kancherla
Reference Number	AT109988	Client PO	
Description	Statement of Work (SOW): Data Retention, Purging & Anonymization		

Client Request

Columbia Utilities is requesting a statement of work from Advanced Utility Systems (Advanced) to enforce its Records & Information Management policy by purging eligible records based on retention and account status, anonymizing non-deletable PII constrained by CIS Infinity, and establishing auditable governance and compliance controls.

Proposed Solution

The services to be provided under this SOW are as follows:

- The configuration will implement Columbia's Records & Information Management policy within CIS Infinity by designing and deploying a structured framework for **Data Purging**, **Data Anonymization**, and **Consent Management**. This includes:
 - **Data Purging Implementation**
 - Configuration of purging logic based on retention rules and customer/account status across multiple data domains, including but not limited to:
 - Billing, reading, and transaction history
 - Active and finalled (no balance): retain 5 years
 - Finalled with balance: retain 7 years
- **Customer data**
 - Finalled no balance > 5 years or finalled with balance > 7 years
 - Customer numbers with active auto-move-in excluded from deletion (anonymization only)
- **Comments**
 - Delete based on expiration rules (5- or 7-year thresholds)
- **Attachments**
 - Retention based on customer/account status (5 or 7 years)
 - Script configurability for add/remove of attachment types
 - Enforcement of "Never Delete" attachment categories:
 - Rates ODR Request
 - UCS Non-Cash Deposit
 - UCS Photo ID

- W&L Energy Audit, Heat Pump, Home Performance, Interconnection, Rebates, Super Saver Loans
- Dusk to Dawn Print
- UCS On/Off/Transfer
- UCS Lease/Proof Owner
- UCS Power of Attorney
- **Service Orders**
 - Retention based on customer/account status
 - Script configurability required
- **Meter, Equipment, User Tasks, Notes, Inquiries, Payment Arrangements**
 - Retention rules applied (5 or 7 years depending on balance status)
 - Exclusions for specific user task types linked to customer moves
- **Move In/Out Data**
 - Active accounts not deleted
 - Finalled accounts purged based on retention windows
- **Configurable Purging Script Requirements**
 - Script flexibility for data types and attachment categories
 - Exclusion logic for never-delete items
 - Ability to maintain updates from newer builds when needed
- **Data Anonymization**
 - Where deletion is not permitted due to CIS Infinity core table constraints, anonymization will be implemented. This includes:
 - Investigation of technical feasibility
 - Determination of masking/nulling strategies
 - Development of an anonymization process
 - Delivery of a feasibility report and implementation plan
- **Audit & Reporting Requirements**
- **Pre-Deletion Report** listing all records eligible for purge
- **Disposal Summary Report** confirming purge activity, timestamp, user, and quantity of records disposed
- **Testing**
 - Testing will include **all functional components defined under the configuration**, including:
 - Verification of purge logic per data category
 - Validation of anonymization rules and outcomes
 - Testing of configurable scripts for Service Orders and Attachments
 - Validation of “Never Delete” attachment logic
 - Execution and review of pre-deletion reports
- Execution and validation of post-purge audit reports
- End-to-end workflow validation of retention logic across customer states
- Confirmation of system stability post-purge/anonymization

- **Documentation**

The following documentation will be delivered:

- **Configuration Documentation**
 - Detailed technical configuration of purging, anonymization, reports, scripts, and business rules
- **Business Process Documentation**
 - Business processes governing retention, purge execution, anonymization procedures, and audit steps

Assumptions

The following assumptions are made to complete the necessary details within this SOW:

- A discovery call will be needed to collect any additional details required prior to implementation.
- AUS will not perform deletions on any tables that could affect system integrity.
- All required CIS Infinity environments (DEV/TEST/UAT/PROD) will be available, stable, and accessible for configuration, testing, and deployment activities, and retention rules will be approved following the discovery phase.
- Any customizations or deviations from standard CIS Infinity functionality will be documented and approved before development begins, and the client will provide access to all external systems, documentation, or data sources required.
- In the event additional hours are required to effectively complete this SOW, a request will be made for the number of hours needed
- If the TEST system is refreshed without notifying Advanced Utility Systems 72 hours prior to the system refresh, Columbia Utilities will be responsible for all costs associated with reconfiguring the system

Price

The price for successfully completing this SOW is \$38,250.00 USD.

Payment Terms

This SOW will be invoiced monthly with the following milestones:

Milestone Payment (MP)	Amount
MP1: Upon signing this SOW	\$26,775.00
MP2: Upon delivery of the changes on one Test application	\$11,475.00
Total	\$38,250.00

Conditions

The following are the conditions for this SOW:

- Advanced will lead and perform the required activities to implement this SOW

- In the event the scope of work changes or new requests, a request for a Change Order will be required with an additional cost
- Client is responsible for testing any changes made under this SOW and promptly provide feedback or additional details required to Advanced
- If desired by Client, Advanced may execute a portion of this SOW during weekend or holiday hours at a premium hourly rate of \$380
- Notice of cancellation of work under this SOW must be received in writing
- Client is responsible for the payment of any/all hours utilized prior to the receipt of cancellation notice which will be invoiced
- This task covers the development and configuration of CIS Infinity interfaces to existing Columbia Utilities's systems and modifications to CIS Infinity, and/or related products in the Infinity product suite, if any, to meet Columbia Utilities's CIS needs. All development work completed by Advanced will be communicated, in advance, to Columbia Utilities's Project Manager so that Columbia Utilities's Project Manager has visibility to all Advanced interface development work. Development effort may be required by the vendor for the system to which Harris is interfacing. These vendor costs, if any, are the responsibility of Columbia Utilities if not in scope.

Expenses

If expenses are incurred by Advanced to provide services outlined in this statement of work, Advanced staff will be using a meal per diem of \$100 per weekday and \$200 per weekend day or holiday which will be billed to the Client. The meal per diem and mileage charges will not be required to submit receipts. All other expenses will continue to be billed on actual-basis (i.e. airfare, hotel, car rental, and fuel) and will be required to submit receipts.

Escalation Process

Several processes may trigger the escalation process which includes issue tracking, contract management, and risk management. This process assumes that prior attempts have been made to resolve the item, and the appropriate parties cannot reach a resolution. When an item is escalated, the appropriate participants are notified via formal communication (email) which includes a summary of the concern/issue and the analysis of each party's position. The participants must be provided with sufficient time to review the analysis and concerns prior to scheduling any resolution meetings.

The levels of escalation and the participants in each level include:

1. Advanced Resource (Customer Success Technical Consultant who is assigned the project)
2. Advanced Manager (Customer Success Team Lead)
3. Advanced Sponsor (Manager of Customer Success)

Standard of Care/Warranty Disclaimer

The standard of care applicable to the Professional Consulting / Information Technology (PC/IT) services arising under this SOW will be the degree of skill and diligence normally employed by PC/IT consultants performing the same or similar services. No further warranty of guaranty, expressed or implied, is made with respect to the services furnished hereunder and all implied warranties are hereby disclaimed including the warranty of merchantability and fitness for a particular purpose.

Limitation of Liability

THE LIABILITY OF ADVANCED (UNDER BREACH OF CONTRACT, NEGLIGENCE, STRICT LIABILITY OR OTHERWISE, AND INCLUDING ANY INDEMNITY OBLIGATION) FOR ANY DAMAGES RELATING TO THIS AGREEMENT SHALL NOT EXCEED THE FEES PAID BY THE CITY TO ADVANCED PURSUANT TO THIS SOW.

IN ADDITION TO THE FOREGOING, ADVANCED SHALL NOT BE LIABLE FOR CONSEQUENTIAL, INCIDENTAL, INDIRECT, SPECIAL OR OTHER DAMAGES OF ANY KIND, INCLUDING BUT NOT LIMITED LOST REVENUE OR LOSS OF PROFITS, EVEN IF ADVANCED HAS BEEN ADVISED OF THE LIKELIHOOD OF THE OCCURRENCE OF SUCH DAMAGES AND NOTWITHSTANDING ANY FAILURE OF ESSENTIAL PURPOSE OF ANY LIMITED REMEDY.

THESE LIMITATIONS SHALL APPLY IN RESPECT OF ANY CLAIM, DEMAND OR ACTION BY A PARTY IRRESPECTIVE OF THE NATURE OF THE CAUSE OF ACTION UNDERLYING SUCH CLAIM, DEMAND OR ACTION, INCLUDING, BUT NOT LIMITED TO, BREACH OF CONTRACT OR TORT.

Notes

- This quote is valid for 30 calendar days from the date of issue and supersedes any previous offers related to services outlined
- Additional or change in scope will require a request for a Change Order

Governing Agreement

- Except as expressly set forth herein, this SOW is pursuant to the terms and conditions of the "Master Services Agreement" mutually executed between the parties on March 27, 2017, as amended.

Authorization

Signature indicates that the parties have read, understood, and agreed to all the contents of this quote.

Authorized by Columbia Utilities		Authorized by Advanced Utility Systems	
		MWilkinson	
Name		Name	
		Executive Vice President	
Title		Title	
		Signed by: MWilkinson7/20/2026	
Signature	Date	Signature3991925C396E4FF...	Date

Client	Columbia Utilities	Client Contact	Ricki Jones
Quote Effective Date	May 14, 2026	Prepared By	Tanuja Kancherla
Reference Number	AT126957	Client PO	
Description	Statement of Work (SOW): IVRNet SMS Integration		

Client Request

Columbia Utilities is requesting a statement of work from Advanced Utility Systems (Advanced) to integrate with IVRNet to support outbound customer communications across multiple channels including - SMS (Text messaging); Voice (IVR/Outbound calls); Email Notifications on CIS Infinity release 4.1.67.

Proposed Solution

The services to be provided under this SOW are as follows:

- CIS will integrate with IVRNet via a file-based integration, enabling Columbia to send outbound communications across SMS, voice, and email channels
- **Integration Approach**
 - The integration will be implemented using 3 structured file-based exports one for each contact type with fields specific to that contact type – SMS, Voice, Email
 - The files will include the Account, Customer, Contact Type, Language and Message
 - Files will be transmitted securely to IVRNet via:
 - FTP (Columbia will provide FTP site so the file can be saved to the respective location)
 - Configure the script messages in CIS based on the contact type and refer the scripts in respective exports
- **Message Content Design**
 - Subject and message body are included as text fields in the export
 - Static messaging configured in CIS will be used
- **Data Requirements from Columbia**
 - Columbia will provide:
 - Email sending domain
 - Preferred voice number type:
 - Local (area code), or
 - Toll-Free
 - Agreement on message content format
 - Customer contact data (phone/email) will be transmitted via CIS exports.
- **Reporting & Usage Tracking**
 - IVRNet will provide monthly usage reports, including:
 - SMS volume
 - Voice call duration

- Email volume
- CIS will not track or reconcile communication usage
- IVRNet reporting will serve as the system of record
- IVRNet will provide delivery results (e.g., delivered, failed)
- Results will be delivered via:
 - FTP file, or
 - Email report
- Results will not be ingested into CIS. If required the results will be uploaded in to the notes field for which an interface is required

Assumptions

The following assumptions are made to complete the necessary details within this SOW:

- Columbia Utilities will be responsible for:
 - Providing IVRNet credentials
 - Defining SMS message content
- SMS notification functionality will leverage existing alerts and action-based notification capabilities available in release 4.1.67
- Any work not explicitly defined in this SOW will be considered out of scope and subject to a change order
- In the event additional hours are required to effectively complete this SOW, a request will be made for the number of hours needed
- If the TEST system is refreshed without notifying Advanced Utility Systems 72 hours prior to the system refresh, Columbia Utilities will be responsible for all costs associated with reconfiguring the system

Price

The price for successfully completing this SOW is \$41,250.00 USD, plus an additional annual recurring integration fee of \$10,000.00 USD.

In addition to the implementation fees, the applicable rates for each communication channel provided by IVRNet are outlined below

Channel	Rate
SMS	\$0.03 per message
Voice	\$0.02 per minute
Email	Included (no charge)

Payment Terms

This SOW will be invoiced monthly with the following milestones:

The annual integration fee is recurring each year, beginning upon go-live in the production environment. The initial fee will be prorated to align with the current billing period. Each

subsequent annual fee will be invoiced under the same terms as the Maintenance and Support Agreement.

Milestone Payment (MP)	Amount
MP1: Upon signing this SOW	\$24,750.00
MP2: Upon completion of the configuration in Test system	\$16,500.00
MP2: Annual fee Upon Go Live prorated to the current billing period	\$10,000.00
Total	\$51,250.00

IVRNet fees will be collected based upon actual usage.

Conditions

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Notes

- This quote is valid for 30 calendar days from the date of issue and supersedes any previous offers related to services outlined
- Additional or change in scope will require a request for a Change Order

Governing Agreement

- Except as expressly set forth herein, this SOW is pursuant to the terms and conditions of the “Master Services Agreement” mutually executed between the parties on August 6th,2014, as amended.

Authorization

Signature indicates that the parties have read, understood, and agreed to all the contents of this quote.

Authorized by Columbia Utilities		Authorized by Advanced Utility Systems	
		Mark wilkinson	
Name		Name	
		Executive Vice President	
Title		Title	
		Signed by:  7/2/2026	
Signature		Signature	
Date		Date	