

**SECOND AMENDMENT
TO PROFESSIONAL SERVICES AGREEMENT NUMBER F002536
WITH WOOLPERT, INC.**

This Second Amendment to Agreement Number F002536, dated October 13, 2022 ("Agreement") is made as of this _____ day of _____, 2026, by and between the City of Santa Rosa, a municipal corporation ("City"), and Woolpert, Inc., an Ohio Corporation ("Consultant" or "Woolpert").

RECITALS

- A. City entered into the Agreement with Consultant for Consultant to provide technical and functional support on an "as needed" basis to maintain and update Cityworks, a new Enterprise Asset Management System ("EAMS") to manage capital assets for multiple City departments
- B. On September 2, 2025, City and Consultant entered into the First Amendment to the Agreement to extend the Time of Performance.
- C. Consultant notified City that the current Cityworks version will lose security support in September 2026, requiring City to upgrade to the Unity platform.
- D. City and Consultant now desire to amend the Agreement for the purpose of updating the Scope of Work to include support for the upgrade to Unity, increasing compensation for the additional work, and extending the Time of Performance.

AMENDMENT

NOW, THEREFORE, the parties agree to amend the Agreement as follows:

- 1. Exhibit A of the Agreement is replaced by Exhibit A-1 to this Second Amendment.
- 2. The last sentence of Section 12 is amended to read as follows:

"Consultant shall not perform any services under this Agreement beyond July 1, 2029 unless agreed in writing by the parties."

- 3. Section 2.c. is amended to read as follows:

"Notwithstanding any other provision in this Agreement to the contrary, the total maximum compensation to be paid for the satisfactory accomplishment and completion of all services to be performed hereunder shall in no event exceed the sum of four hundred and one thousand dollars and no cents (\$401,000.00). City's Chief Financial Officer is authorized to pay \$231,000.00 from Charge Number 350307-5378 and \$85,000.00 from Charge Number JL 55740."

- 4. Except as specifically modified in this Amendment, all other terms of the Agreement shall

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remain in full force and effect.

Executed as of the day and year first above stated.

CONSULTANT: Woolpert, Inc.,
an Ohio Corporation

CITY OF SANTA ROSA
a Municipal Corporation

TYPE OF BUSINESS ENTITY (*check one*):

☐ Individual/Sole Proprietor
☐ Partnership
☒ Corporation
☐ Limited Liability Company
☐ Other (please specify: _____)

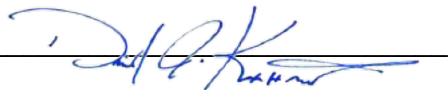
By: _____

Print Name: _____

Title: _____

Signatures of Authorized Persons:

APPROVED AS TO FORM:

By: 


Office of the City Attorney

Print Name: David Kuxhausen

Title: Vice President

ATTEST:

By: Salman Rashid

Print Name: Salman Rashid

Title: CFO

City Clerk

City of Santa Rosa Business Tax Cert. No.

06517754

Attachments:

Exhibit A-1 – Scope of Services

CITY OF SANTA ROSA, CALIFORNIA

UNITY MIGRATION SCOPE OF SERVICES

Date: April 14, 2026



Document Acceptance

Client Approval:

City of Santa Rosa,
CA:

Date:

Woolpert Approval:

Market Director,
Mark Seastead:

Date:

Document Version Control

Version	Date	Description	Author(s)
1.0	02/05/2026	Initial Draft	Ean A. Hamilton
2.0	04/14/2026	Final	Jeannine Sarragossa / Ean A. Hamilton

Quality

At Woolpert, quality is the cornerstone of our business. We invite your comments and suggestions for improving this document.

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TECHNICAL APPROACH

The City of Santa Rosa has requested a Statement of Work (SOW) to support migration from its existing on-premise Cityworks Office (v. 15.8.9) environment to the cloud-hosted Unity Maintain platform. The City currently operates five active domains—Service Request, City Services, Local Water, TPW, and Regional—with the Service Request domain utilized enterprise-wide.

In alignment with Trimble Inc.'s published timeline to sunset support for Cityworks 15.8.9 in September 2026, Woolpert recommends transitioning to Unity Maintain as the City's long-term cloud-based CMMS solution. Given the City's established use of Cityworks and prior administrative training, the migration will follow a collaborative delivery model, leveraging both Woolpert and City technical resources.

The technical approach begins with Woolpert restoring and upgrading a backup of the City's production database to Cityworks 23.x within a secure Woolpert internal environment. This interim upgrade will allow for assessment of database structure, custom components, and system integrations to confirm compatibility and performance. Once the upgrade to 23.x has been validated, Woolpert, in coordination with Trimble, will migrate the database to establish the Unity development.

Concurrently, Woolpert will work together with the City to migrate specific Cityworks Office (15.8.9) content organized by domains to Cityworks Respond (4.3). User migration will occur iteratively, enabling focused configuration of domain-specific workflows, dashboards, and reports while minimizing operational disruption. It is recommended that the Service Request domain content be migrated based on configuration groups.

Upon completion of configuration migrations to Respond and validation activities, Woolpert will again request a .bak of the City of Santa Rosa database, where all relevant Respond 4.3 configurations have been completed and accepted by the City. Woolpert will again restore and upgrade a backup of the City's production database to Cityworks 23.x within a secure Woolpert internal environment. Once the upgrade to 23.x has been validated, Woolpert will coordinate with Trimble to migrate the database to the Unity Development environment. With this methodology, the City will go directly from 15.8.9 to Cityworks Unity without interfering with existing on-premise users or performing upgrades to on-premise City environments.

Within the Unity Development environment, Woolpert will facilitate Unity orientation training and work with the City to pilot the usage of the mobile application (Unity Field). Woolpert will also collaboratively evaluate the Water Billing (CIS) integration with City technical staff, completing restoration activities and validating existing integration functionality.

After integration validation is complete, the City will lead user acceptance training, testing, and end-user training, with remote support from Woolpert. Successful testing will culminate in the execution of a structured transition plan to fully migrate users from the on-premise environment to the cloud-hosted Unity platform.

1 PHASE 1–DESIGN

The design phase of this implementation project begins with a request for information (RFI), which is provided to the City to gather data and insights into the City's current operations. Woolpert will then schedule and facilitate the project kick-off meeting to discuss the project schedule, scope of work, and expectations for collaboration and communication throughout the project.



Following the kick-off, Woolpert will upgrade a copy of the City's production database to Cityworks 23 and coordinate with Trimble for the initial migration to the Unity Maintain development environment. This preliminary upgrade will establish the baseline for development of a transition plan, to be refined in Phase 3.

1.1 Request for Information

Once Woolpert receives a Notice to Proceed, Woolpert will initiate the project by sending the City an RFI document. This document will outline a list of potential items the client can provide to facilitate understanding before the project begins. This information may include, but is not limited to, the following items:

- Geodatabase and map documents
- Integration software API Details
- XML files
- Cityworks Login Details
- Database backup of Production site
- Backup of Production GIS database
- SharePoint / VPN / Server Access

Category	Details
Woolpert Deliverables	• Request for Information (RFI) document.
Assumptions	• This task will begin when a Notice to Proceed is received from the client. • It is not expected that the client will have all the information listed in the document. They will provide only the information available and upload it to the collaboration site.
Client Responsibilities	• Gather the information listed in the RFI and upload it to the collaboration site. • Configure and provide the necessary VPN/server connection to Woolpert.

Related Tasks and Sub-Tasks

WBS	Task name
1.1	Request for Information (RFI)
1.1.1	RFI Document Delivery
1.1.2	Client to Review and Gather RFI Data
1.1.3	Client to Post Data to the Shared Team Site
1.1.4	RFI Data Review

Black	Woolpert-owned task
Green	Client-owned task
Purple	Remote review meeting
Blue	On-site workshop
Olive	QA/QC
Red	Deliverable acceptance
Orange	Phase acceptance, close

1.2 Project Kick-off Meeting

After the RFI is submitted, Woolpert and the City will schedule the Project Kick-off meeting. This meeting will include the project team and stakeholders reviewing in detail the project's objectives, scope, timeline, roles, responsibilities, and other critical aspects. This meeting sets the tone for the project, ensures everyone has a common understanding, and aligns all parties on the project's goals and expectations. Key components of a kick-off meeting typically include:

- **Introduction:** Introduce the project team and stakeholders.
- **Project overview:** Provide a high-level overview of the project, including its goals and the City's objectives.
- **Scope and deliverables:** Review the scope in detail and address questions, key deliverables, and major milestones.
- **Timeline and schedule:** Review the project timeline, including important deadlines and key milestones. Define regularly scheduled client status meetings.
- **Communication plan:** Discuss communication methods, frequency of updates, collaboration site, and reporting structure.
- **Document version control:** Identify the process for the management of project document deliverables.
- **Questions and clarifications:** Questions and clarifications to ensure everyone is on the same page.

During the project kick-off meeting, Woolpert will facilitate a high-level Unity demonstration for future system users, stakeholders, and project teams. These sessions will provide information about the software layout, common terminology, and general functionality, and show the system's ease of use. The Unity software demonstrations will provide a high-level understanding of the future for the City users.

Category	Details
Woolpert Deliverables	• Project kick-off meeting agenda. • Project kick-off meeting PowerPoint. • Facilitate remote review project kick-off meeting for up to two (2) hours in duration. • Project kick-off meeting notes.
Assumptions	• The client is expected to invite the participants needed to attend the kick-off meeting.

Exhibit A-1

Category	Details
	The duration of the kick-off meeting can be adjusted to suit different participant groups. For example, two hours for a high-level project kick-off meeting for general participants and two hours for a more focused group of project team members.
Client Responsibilities	- Review and provide feedback on the agenda. - Review and provide feedback on PowerPoint. - Schedule participants to attend the project kick-off meeting.

Related Tasks and Sub-Tasks

WBS	Task name
1.2	Project Kick-off Meeting
1.2.1	Draft Kick-Off Meeting Agenda & Submit to Client
1.2.2	Prepare Presentation for Kick-off Meeting
1.2.3	Kick Off Meeting / Software Demonstration
1.2.4	Submit Kick-Off Meeting Minutes
1.2.5	Client to Provide Feedback on Meeting Minutes
1.2.6	Finalize and Close Kick-Off Meeting

Black	Woolpert-owned task
Green	Client-owned task
Purple	Remote review meeting
Blue	On-site workshop
Olive	QA/QC
Red	Deliverable acceptance
Orange	Phase acceptance, close

1.3 Software Upgrade to Cityworks 23.x

The City will provide a production (bak) database backup to support the upgrade initiative. Woolpert will restore the backup to its secure [Woolpert] server environment and perform the upgrade from version 15.8.9 to CW23.x. Following the upgrade, Woolpert will conduct a comprehensive assessment of the database structure, including a review of triggers, stored procedures, and related components, to confirm compatibility and functionality within the upgraded environment. Woolpert technical staff will also assess the existing office configuration and provide recommendations for changes in Respond 4.3. The results of the assessment will be drafted as a deliverable assessment/transition plan, which will be further revised for final submission during Task 3.7 (Transition Planning).

Woolpert will execute solution testing to validate system performance and data integrity. Upon successful validation, a backup of the upgraded database will be generated and transmitted to Trimble for restoration within the Unity sandbox environment. The effort will conclude with the delivery of an assessment document and transition plan outlining findings, recommendations, and next steps to support deployment.

Category	Details
Woolpert Deliverables	• Verify the new server environment with pre-requisites. • Assessment of the database structure, including review of triggers, stored procedures, and related components, to confirm compatibility and functionality within the upgraded environment. • Develop draft assessment/transition plan document. • Upgrade Development Environment to Cityworks 23.x. • Baseline testing of the Cityworks 23.x solution. • Provide bak of upgrade Cityworks 23.x solution to Trimble for Unity DEV migration. • Validate City core team member access to the Unity Maintain development environment.
Assumptions	• The upgrade of 23.x will occur on Woolpert servers. • An assessment of the City database and configuration will occur on Woolpert servers. • City will confirm that ancillary Cityworks 23.x software requirements are met before the PROD upgrade task. • Integration validation will be handled in Task 2.2 for full testing. • Woolpert will coordinate with Trimble for the restoration of the upgraded Cityworks 23.x solution. • Trimble technical staff will facilitate the migration to Unity. • Initial development will occur within the City T3DEV environment. Upon City approval, configurations will be migrated to PROD. • Task 3.3 activities can begin as soon as the Unity development environment is available.
Client Responsibilities	• Participate in meetings/discussions as needed. • Review and provide feedback to the assessment/transition plan. • Participate in prioritizing and assigning City-owned configuration tasks.

Related Tasks and Sub-Tasks

WBS	Task name
1.3	Software Upgrade 15.8.9 to Cityworks 23.x
1.3.1	City to provide .bak of PROD
1.3.2	Woolpert to Upgrade 15.8.9 to CW23.x (Woolpert Servers)
1.3.3	Assess Database Structure (Triggers, Procedures etc.)
1.3.4	Test Solution
1.3.5	Backup and Send Upgraded DB to Trimble for Restore to Unity
1.3.6	Test Solution
1.3.7	Draft and Submit Assessment Document / Transition Plan
1.3.8	City to Review and Provide Feedback
1.3.9	Review Dashboards, Prioritize, and Assign Responsibility

Black	Woolpert-owned task
Green	Client-owned task
Purple	Remote review meeting
Blue	On-site workshop
Olive	QA/QC
Red	Deliverable acceptance
Orange	Phase acceptance, close

1.4 Phase 1 Quality Control and Quality Assurance

Woolpert technical resources not regularly involved with this project will perform an independent quality review of the work processes and deliverable products in accordance with the Woolpert Total Quality Plan.

Category	Details
Woolpert Deliverables	N/A
Assumptions	- The QAQC process will be conducted prior to each deliverable submitted to the client. - If the client determines quality is not satisfactory, the client project manager will reach out to the Woolpert project manager to escalate the situation.
Client Responsibilities	Ensure quality deliverables are received and approve documentation.

Related Tasks and Sub-Tasks

WBS	Task name
1.4	Quality control and assurance

Black	Woolpert-owned task
Green	Client-owned task
Purple	Remote review meeting
Blue	On-site workshop
Olive	QA/QC
Red	Deliverable acceptance
Orange	Phase acceptance, close

1.5 Phase 1 Acceptance and Close

At this stage, the City's project manager will sign a phase exit document indicating that Woolpert has delivered the Phase 1 services per this scope of services and project plan. Phase 2 will not begin until the City accepts Phase 1.

Category	Details
Woolpert Deliverables	Phase acceptance document.
Assumptions	If the client is more comfortable conducting the survey once the project is complete, Woolpert can hold the support until the end.
Client Responsibilities	- Review and provide phase acceptance document approval. - Provide response to survey.

Related Tasks and Sub-Tasks

WBS	Task name
1.5	Phase 1 acceptance and close

Black Woolpert-owned task
 Green Client-owned task
 Purple Remote review meeting
 Blue On-site workshop
 Olive QA/QC
 Red Deliverable acceptance
 Orange Phase acceptance, close

2 PHASE 2–DEVELOP

Woolpert will provide remote support services to assist the City in completing the activities required to successfully upgrade to Cityworks 23.x. Services will include oversight and technical guidance to ensure configurations, reports, and dashboards are properly reviewed, aligned, and functioning as intended within the upgraded environment.

2.1 Software Orientation Training (Respond 4.3)

With the kick-off meeting, demonstrations, and upgrade to Cityworks 23.x complete, Woolpert will conduct software orientation training. Software Orientation training will provide a more in-depth learning opportunity for the City staff.

Category	Details
Woolpert Deliverables	- Software orientation training agenda. - Facilitate remote software orientation training: - Session 1, up to three (3) hours in duration. - Session 2, up to three (3) hours in duration.
Assumptions	There will be a limit to the number of participants for the orientation training, not to exceed twelve (12) people per session.

Exhibit A-1

Category	Details
	The client project manager will schedule the attendees for each session. The sessions will include Respond 15.8.9 (v.4.3) - work orders, service requests, inspections, reporting, and dashboards.
Client Responsibilities	Review and provide feedback on the agenda. Schedule participants to attend the orientation training.

Related Tasks and Sub-Tasks

WBS	Task name
2.1	Software Orientation Training (Respond 4.3)
2.1.1	Training Agenda and Submit to Client
2.1.2	Prepare for Orientation Training
2.1.3	Orientation Training
2.1.3.1	Session 1
2.1.3.2	Session 2

Black	Woolpert-owned task
Green	Client-owned task
Purple	Remote review meeting
Blue	On-site workshop
Olive	QA/QC
Red	Deliverable acceptance
Orange	Phase acceptance, close

2.2 Software Configuration (Respond 4.3)

The Santa Rosa Cityworks environment consists of five (5) domains.

- Service Requests
- TPW
- Regional
- Local Water
- City Services

To support an organized and efficient migration effort, Woolpert recommends grouping domains into structured development groups to focus on configuration updates, reporting validation, and dashboard refinement.

Proposed Development Groups

Group	Domain
1	- Service Requests - TPW - City Services
2	- Local Water - Service Requests
3	Regional

Exhibit A-1

Group	Domain
	Service Requests

Within the deliverable of Task 1.3.7 (Draft and Submit Assessment Document / Transition Plan), Woolpert and the City prioritized and assigned configuration responsibilities. The City and Woolpert will work together to configure the necessary queries, dashboards, and configurations within the City T3Dev environment (Respond 4.3). Once configurations are finalized and tested within the T3Dev environment, the City will be responsible for replicating the configurations with the existing City-owned [on-premise] production environment. There will be a four (4) week period allocated to the development of all (Respond 4.3) configurations, queries, and dashboards efforts.

Category	Details
Woolpert Deliverables	- Provide Remote support to the three (3) development groups as follows: - Service Requests, TPW, City Services - Up to forty (40) hours to review dashboards, prioritize, and assign responsibilities. - Service Requests, Local Water - Up to forty (40) hours to review dashboards, prioritize, and assign responsibilities. - Service Requests, Regional - Up to forty (40) hours to review dashboards, prioritize, and assign responsibilities.
Assumptions	- The client will configure in the City's environment. - The client is responsible for group documentation of updates. - All activities will be performed remotely. - All group tasks will be completed in four (4) week periods. - The hours allotted can be repurposed between groups to support longer training hours or more support with updates.
Client Responsibilities	- Document and perform necessary configuration updates. - Provide City technical resource(s) to support the development phase.

Related Tasks and Sub-Tasks

WBS	Task name
2.2	Software Configuration
2.2.1	TPW City Services Service Request
2.2.1.1	Configure System
2.2.1.2	Configuration Support
2.2.2	Local Water Service Request
2.2.2.1	Configure System
2.2.2.2	Configuration Support
2.2.3	Regional Service Request
2.2.3.1	Configure System
2.2.3.2	Configuration Support

2.3 Phase 2 Quality Control and Quality Assurance

Woolpert technical resources not regularly involved with this project will perform an independent quality review of the work processes and deliverable products in accordance with the Woolpert Total Quality Plan.

Category	Details
Woolpert Deliverables	N/A
Assumptions	- The QAQC process will be conducted prior to each deliverable submitted to the client. - If the client determines quality is not satisfactory, the client project manager will reach out to the Woolpert project manager to escalate the situation.
Client Responsibilities	Ensure quality deliverables are received and approve documentation.

Related Tasks and Sub-Tasks

WBS	Task name
2.3	Quality control and assurance

- Black Woolpert-owned task
- Green Client-owned task
- Purple Remote review meeting
- Blue On-site workshop
- Olive QA/QC
- Red Deliverable acceptance
- Orange Phase acceptance, close

2.4 Phase 2 Acceptance and Close

At this stage, the City's project manager will sign a phase exit document indicating that Woolpert has delivered Phase 2 services per this scope of services and project plan. Phase 3 will not begin until the City accepts Phase 2.

Category	Details
Woolpert Deliverables	Phase acceptance document.
Assumptions	If the client is more comfortable conducting the survey once the project is complete, Woolpert can hold the support until the end.
Client Responsibilities	- Review and provide phase acceptance document approval. - Provide a response to the survey.

Related Tasks and Sub-Tasks

WBS	Task name
2.4	Phase 2 acceptance and close

Black	Woolpert-owned task
Green	Client-owned task
Purple	Remote review meeting
Blue	On-site workshop
Olive	QA/QC
Red	Deliverable acceptance
Orange	Phase acceptance, close

3 PHASE 3—DEPLOY

Once Cityworks 15.8.9 (Respond 4.3) has been configured and advanced analytics created (custom reports and dashboards), several critical tasks must be completed before the solution is ready for migration to Unity Maintain. Woolpert's Project Team will guide the City's project team through a series of deployment tasks to ensure a fully tested and accepted solution and that the user community is ready for daily use.

Woolpert will upgrade the updated 15.8.9 database to Cityworks 23.x and coordinate the migration to the cloud-hosted Unity Maintain development environment. Once the migration is complete, Woolpert will facilitate a remote meeting to review the results/updates of the migration. Subsequently, Woolpert will provide remote Software Orientation Training and Mobile (Field) workshops to familiarize the City technical team with Unity.

During Phase 3, Woolpert will provide remote support to City technical staff, who will be validating and performing any necessary changes to the Water Billing system integration. Following City validation and testing of integrations, the City Technical (TAS / DAS) and user community will internally conduct User Acceptance Training and Testing (UAT). Woolpert technical staff will be available remotely to provide up to twenty (20) hours for remote UAT support.

Once the UAT is complete, Woolpert will review and provide updates to the assessment/transition plan. Following updates, Woolpert, the City, and will perform the transition to the Unity production environment in preparation for go-live using the approved transition plan. Woolpert will provide up to two (2) days of on-site production launch support. Woolpert/City will continue discussions on the scheduling of on-site support, as events may not occur directly following go-live.

During Post-Go-Live support, Woolpert will back up the production environment and restore the configuration to the development environment for the City, with support from Trimble.

3.1 Migrate to Unity (DEV Environment)

Woolpert will initiate the System Deployment Phase by preparing and upgrading a backup copy of the City's existing production database to version 23.x, ensuring compatibility with the latest platform requirements and functionality. Following the successful upgrade and internal verification, Woolpert will coordinate with Trimble to migrate the upgraded (23.x) database to the cloud-hosted Unity Maintain solution.

Category	Details
Woolpert Deliverables	• Verify the new server environment with pre-requisites. • Develop draft transition plan document. • Upgrade Development Environment to Cityworks 23.x. • Baseline testing of the Cityworks 23.x solution. • Validate City core team member access to the Unity Maintain development environment. • Coordination Migration to Unity Maintain with the Trimble technical team. • Baseline testing of the Unity Maintain solution. • Facilitate a remote meeting for up to two (2) hours to review Unity Migration cutover plan updates.
Assumptions	• City will confirm that ancillary Cityworks 23.x software requirements are met prior to providing PROD .bak. • Trimble technical staff is responsible for the migration to the upgraded Cityworks 23.x database to the cloud-hosted Unity solution.
Client Responsibilities	• Provide .bak of Production environment to Woolpert • The client must accept the Respond 4.3 configuration prior to the database being provided to Woolpert.

Related Tasks and Sub-Tasks

WBS	Task Name
3.1	Migrate to Trimble Unity DEV Environment
3.1.1	Woolpert to Submit Ticket to Trimble for Unity
3.1.2	City to provide .bak of PROD
3.1.3	Woolpert to Upgrade 15.8.9 to CW23.x (Woolpert Servers)
3.1.4	Trimble to Migrate CWOL PROD to Unity DEV
3.1.5	Woolpert to QA/QC New Site
3.1.6	Remote Review Meeting for Cutover Updates

Black	Woolpert-owned task
Green	Client-owned task
Purple	Remote review meeting
Blue	On-site workshop
Olive	QA/QC
Red	Deliverable acceptance
Orange	Phase acceptance, close

Software Orientation Training (Unity)

With Respond 4.3 fully configured, upgraded to Cityworks 23.x, and migrated to Unity, Woolpert will provide software orientation training. This training will give City staff a more in-depth opportunity to learn about the Unity system.

Category	Details
Woolpert Deliverables	- Software orientation training agenda. - Facilitate remote software orientation training: - Session 1 (Admin), up to three (3) hours in duration. - Session 2 (Respond), up to three (4) hours in duration.
Assumptions	- There will be a limit to the number of participants for the orientation training, not to exceed twelve (12) people per session. - The client project manager will schedule the attendees for each session. - The sessions will include Trimble Unity - work orders, service requests, inspections, reporting, dashboards, and admin. - The participants do not require personal computers. These meetings will be interactive demonstration sessions, where City individuals can ask how the system can perform specific tasks.
Client Responsibilities	- Review and provide feedback on the agenda. - Schedule participants to attend the orientation training.

Related Tasks and Sub-Tasks

WBS	Task name
3.2	Software Orientation Training (Unity)
3.2.1	Training Agenda and Submit to Client
3.2.2	Prepare for Orientation Training
3.2.3	Orientation Training
3.2.3.1	Session 1 - Admin
3.2.3.2	Session 2 - Respond

Black	Woolpert-owned task
Green	Client-owned task
Purple	Remote review meeting
Blue	On-site workshop
Olive	QA/QC
Red	Deliverable acceptance
Orange	Phase acceptance, close

3.2 Water Billing Integration Testing

The City maintains an existing Water Billing System (Advanced Utility Systems CIS) and CCTV (ITpipes) Integrations with Cityworks AMS 15.8.9 that will require validation for compatibility with Unity. Upon completion of Task 1.3, Woolpert will provide remote support to assist the City in restoring and validating existing integration functionality as part of the migration to Unity.

Category	Details
Woolpert deliverables	Woolpert will remotely support the City in validating and troubleshooting integrations in the newly deployed Unity development environment for up to eighty (80) hours.
Assumptions	- The City will own any integration updates. - The City will conduct end-to-end testing of documented integration workflows and provide authorization to Woolpert to proceed to the next phase of the project. - The City is responsible for all project coordination and communications with any third party, such as Advanced Utility Systems (AUS), IT hardware, and software.
Client responsibilities	- Perform end-to-end integration testing in the development environment. - Perform any additional updates to integration with support from Woolpert. - Validate Integration in Upgraded Environment. - User Acceptance Cloud Testing.

Related Tasks and Sub-Tasks

WBS	Task name
3.3	System Integration Validation
3.3.1	Water Billing Integration Testing
3.3.1.1	Validate Integration in Upgraded Environment
3.3.1.2	Provide Integration Troubleshooting and Support
3.3.2	IT Pipes Integration Testing
3.3.2.1	Validate Integration in Upgraded Environment
3.3.2.2	Provide Integration Troubleshooting and Support

Black	Woolpert-owned task
Green	Client-owned task
Purple	Remote review meeting
Blue	On-site workshop
Olive	Quality Control and Assurance
Red	Deliverable Acceptance
Orange	Phase Acceptance, Close
Gold	DOT Support

3.3 Esri / GIS Support

Trimble Unity is a GIS-centric asset management solution that uses the Esri enterprise geodatabase as the system of record for asset data (asset registry). As a result, Unity does not maintain separate, redundant asset tables; instead, it connects directly to the GIS database to access, display, and update asset information through the Unity user interface. Unity leverages specific feature class layers to enable functionality within the Unity front end. Although the City is an existing user of Esri and Cityworks, Woolpert recommends following established best practices for configuring and using GIS services within Unity. Woolpert will provide up to sixteen (16) hours of remote Esri/GIS support.

Category	Details
Woolpert Deliverables	Provide up to sixteen (16) hours of remote support for the publishing of services, creation of web maps, or consulting on best practices.
Assumptions	- All activities will be performed remotely. - The client project manager will schedule the attendees for each session.
Client Responsibilities	- The City is responsible for maintaining Esri licensing and implementing any changes necessary for Unity. - Participate in scheduled workshop sessions.

Related Tasks and Sub-Tasks

WBS	Task name
3.4	Esri / GIS Support
3.4.1	Remote Support

Black	Woolpert-owned task
Green	Client-owned task
Purple	Remote review meeting
Blue	On-site workshop
Olive	QA/QC
Red	Deliverable acceptance
Orange	Phase acceptance, close

3.4 Unity Field (Pilot)

Exhibit A-1

The City has expressed a desire to explore the Trimble Unity Field application. Unity Field is a configurable mobile application designed for field teams to efficiently collect data and complete tasks. It enables GIS-centric workflows, allowing field workers to map assets, inspect infrastructure, and synchronize data directly with Trimble Asset Lifecycle Management solutions. Woolpert will work with the pilot Unity Field.

Woolpert will facilitate a Mobile Application Discovery workshop to demonstrate application functionality and to gather user requirements. Upon completion of the workshop, Woolpert will document the decisions in the form of a Unity Field Findings and App Deployment Strategy Memorandum and submit it to the City's PM for dissemination and review by the City Core Team. Woolpert shall facilitate a remote review meeting with the team and make appropriate updates to the Draft Memorandum.

Woolpert will configure the Cityworks Mobile App per the details captured in the memorandum and provide the configured applications to the City team for testing. The City team shall document the test results and provide written feedback to Woolpert. Woolpert will provide remote testing assistance to the City during the testing period. Woolpert will then provide remote support to update the Unity Field application configuration per the City's testing results. Further development and deployment beyond the remote hours will occur with a change control notice.

Category	Details
Woolpert Deliverables	• Woolpert will facilitate a Mobile Solution workshop for up to four (4) hours • Woolpert will document workshop findings in the form of a Draft Memorandum and submit it to the City for review. • Woolpert will update the memorandum and submit the final document to the City for approval. • Woolpert will configure the Cityworks Mobile App solution for each User Group type. • Woolpert will provide up to fourteen (14) hours of remote testing support of the solution.
Assumptions	• The City is responsible for any necessary Esri/GIS changes.
Client Responsibilities	• City will participate in the Mobile Solution workshop. • City will review and provide feedback and approval to deliverable documents. • City will ensure required team members perform testing of the configured solution. • City team members will document test results and provide them to Woolpert for updates to the configuration.

Related Tasks and Sub-Tasks

Exhibit A-1

WBS	Task name	
3.5	Trimble Unity Field (Pilot)	
3.5.1	Prepare & Submit Cityworks AMS Mobile Solution Workshop Agenda	
3.5.2	Prepare for Cityworks AMS Mobile Solution Workshops	
3.5.3	Unity Field Discovery Workshops	
3.5.3.1	Facilitate Remote Discovery Workshops	
3.5.3.2	Document & Submit Workshop Decisions Technical Memorandum	
3.5.3.3	City to Review Draft Document and Provide Feedback	
3.5.3.4	Remote Review Meeting of Memorandum	
3.5.4	Cityworks AMS Mobile Solution Configuration and Deployment	
3.5.4.1	Configure Cityworks AMS Mobile Solution for Field user by User Group Type	
3.5.4.2	Test Cityworks AMS Mobile Solution Configurations in a Pilot Area	
3.5.4.3	Document Pilot Test Results	
3.5.4.4	Provide Remote Pilot Testing Support	
3.5.4.5	Support Configuration Updates Based on Pilot Testing Results	

Black Woolpert-owned task

Green Client-owned task

Purple Remote review meeting

Blue On-site workshop

Olive QA/QC

Red Deliverable acceptance

Orange Phase acceptance, close

3.5 User Acceptance Testing

The primary objective of system testing is to thoroughly assess the newly installed and configured solution, ensuring that all delivered functionalities—such as configuration workflows, system integrations and interfaces, reports, and dashboards—are operating correctly. The City will lead all activities related to tester training and user acceptance testing (UAT), with Woolpert providing remote support.

Category	Details
Woolpert Deliverables	Provide up to twenty (20) hours of remote UAT support.
Assumptions	- Task 3.6 will be facilitated remotely. - The client is responsible for the testing of the Unity solution and integrations.
Client Responsibilities	- Client to Test Solution - Finalize and approve Unity Development environment

Related Tasks and Sub-Tasks

WBS	Task name
3.6	User Acceptance Testing
3.6.1	Technical (TAS / DAS)
3.6.1.1	Client Testing
3.6.1.2	Remote Support
3.6.1.3	Core Team Acceptance
3.6.2	User Community
3.6.2.1	Client Training
3.6.2.2	Client Testing
3.6.2.3	Remote Support
3.6.2.4	User Acceptance

Black	Woolpert-owned task
Green	Client-owned task
Purple	Remote review meeting
Blue	On-site workshop
Olive	QA/QC
Red	Deliverable acceptance
Orange	Phase acceptance, close

3.6 Transition Planning

Woolpert will update the transition plan (Task 1.3.7 Draft and Submit Assessment Document / Transition Plan) in collaboration with the City project team. This transition plan will outline the roles and responsibilities of each team and the sequence of tasks necessary for a successful solution roll-out. Additionally, the plan will detail the most effective strategy for the City to transition from the Cityworks 15.8.9 to Unity.

To ensure thorough preparation, Woolpert will conduct a remote review meeting to finalize the transition planning tasks and confirm that all participants are confident in their roles and responsibilities. The City team will be responsible for completing the tasks assigned to the City in the transition plan document.

Category	Details
Woolpert Deliverables	- Develop Transition Plan - Conduct a remote review of the transition plan with the City for up to two (2) hours. - Final version of Transition Plan.
Assumptions	- Woolpert will need decision makers and management to align with the decided transition plan. This document must be approved and signed prior to moving to production launch. - All sub-tasks in this task will be performed remotely. - All required tasks for the test cutover be facilitated remotely.

Exhibit A-1

Category	Details
	The City Team will work with the Woolpert Project Team to ensure access to the necessary data and servers.
Client Responsibilities	- Review and approve the Transition Plan. - Support Woolpert as needed.

Related Tasks and Sub-Tasks

WBS	Task name
3.7	Transition Planning
3.7.1	Update Transition Plan & Submit to Client
3.7.2	Review Document with Client
3.7.3	Update Document Based on Feedback and Submit to Client

Black	Woolpert-owned task
Green	Client-owned task
Purple	Remote review meeting
Blue	On-site workshop
Olive	QA/QC
Red	Deliverable acceptance
Orange	Phase acceptance, close

3.7 Go/No-Go Decision

Woolpert will hold a remote meeting with the City to review any outstanding items or concerns regarding the transition to Unity. During the meeting, Woolpert will provide solutions and ideas to address each issue and facilitate progress. Upon conclusion of the discussion, if approved, the City will send Woolpert an acceptance email to proceed in production launch.

Category	Details
Woolpert Deliverables	Facilitate a remote review meeting for up to two (2) hours in duration to make a go/no-go decision on upgrading to Unity.
Assumptions	N/A
Client Responsibilities	- Administrators, stakeholders, and the core testing team should be included in the go/no-go meeting. - Acceptance email.

Related Tasks and Sub-Tasks

WBS	Task name
3.8	Go / No-Go Decision
3.8.1	Remote Go-No Go Meeting

Black	Woolpert-owned task
Green	Client-owned task
Purple	Remote review meeting
Blue	On-site workshop
Olive	QA/QC
Red	Deliverable acceptance
Orange	Phase acceptance, close

3.8 Production Launch

Exhibit A-1

Woolpert and the City Project Team will jointly coordinate these efforts, adhering to the transition plan as the reference. Once the transition to production is successfully completed, the City will be ready to go live with the new solution. Woolpert will provide on-site resource(s) to assist with coaching new users and making any necessary minor adjustments to support the transition. After a successful production launch, Woolpert will coordinate with Trimble to back up the production environment and restore it to the development environment.

Category	Details
Woolpert Deliverables	• Provide on-site resources for up to two (2) days of production support. • Back up the Production environment and restore to Development.
Assumptions	• The execution of the transition plan will occur remotely. • Woolpert/City will continue discussions on the scheduling of on-site support, as events may not occur directly following go-live
Client Responsibilities	• The City PM will provide project sign-off following go-live. • The City PM, and Project Team should equally assist in administering the go-live tasks to make sure it is clear to the end-users that the City is internally capable of supporting the newly deployed enterprise solution. The City will benefit from learning basic Enterprise Solution troubleshooting routines during this time.

Related Tasks and Sub-Tasks

WBS	Task name
3.9	Production Launch
3.9.1	Execute Transition Plan
3.9.2	Production On-site Support Trip 1
3.9.3	Project Closeout

Black	Woolpert-owned task
Green	Client-owned task
Purple	Remote review meeting
Blue	On-site workshop
Olive	QA/QC
Red	Deliverable acceptance
Orange	Phase acceptance, close

3.9 Phase 3 Quality Control and Quality Assurance

Woolpert technical resources not regularly involved with this project will perform an independent quality review of the work processes and deliverable products in accordance with the Woolpert Total Quality Plan.

Category	Details
Woolpert Deliverables	N/A
Assumptions	- The QAQC process will be conducted prior to each deliverable submitted to the client. - If the client determines quality is not satisfactory, the client project manager will reach out to the Woolpert project manager to escalate the situation.
Client Responsibilities	Ensure quality deliverables are received and approve documentation.

Related Tasks and Sub-Tasks

WBS	Task name
3.10	Quality control and assurance

Black Woolpert-owned task
 Green Client-owned task
 Purple Remote review meeting
 Blue On-site workshop
 Olive QA/QC
 Red Deliverable acceptance
 Orange Phase acceptance, close

3.10 Phase 3 Acceptance and Close

At this stage, City's project manager will sign a phase exit document indicating that Woolpert has delivered the Phase 3 services per this scope of services and project plan. Following the acceptance of phase 3, Woolpert will begin project close-out steps.

Category	Details
Woolpert Deliverables	- Phase acceptance document. - Project Survey. - Zipped file of approved Project Deliverables.
Assumptions	N/A
Client Responsibilities	- Review and provide phase acceptance document approval. - Provide a response to the survey.

Related Tasks and Sub-Tasks

WBS	Task name
3.10	Phase 3 acceptance and close.

Black Woolpert-owned task
 Green Client-owned task
 Purple Remote review meeting
 Blue On-site workshop
 Olive QA/QC
 Red Deliverable acceptance
 Orange Phase acceptance, close

4 PHASE 4–TECHNICAL SUPPORT SERVICES

Woolpert team members will provide technical support services to the City of Santa Rosa, CA (City). As needed, the City will notify Woolpert that additional support services are being requested. Woolpert and the City will discuss the needed services and clearly document the support services to be performed. Support services may include, but are not limited to:

- Unity Maintain (formally Cityworks) configuration
- Software version upgrades
- Training
- Technical troubleshooting
- System integrations
- Data migration
- Report development
- Database management
- Workflow and performance improvement support
- Project management and administration
- Cityworks Online (CWOL) / Cloud migration support
- Any other services related to the performance and usage of Cityworks, Trimble Unity Maintain, and ArcGIS

Services will be provided for four years starting January 29th, 2026, and valid through June 30th, 2029, and can be extended as allowed within said contract; however, it will require rate updates. For each task authorization requested, Woolpert or the City will clearly document in writing:

- The services to be provided
- Deliverables to be submitted
- Assumptions pertaining to the provided services
- Woolpert responsibilities
- City responsibilities
- Schedule
- Estimated hours

Category	Details
Woolpert Deliverables	• To provide professional, technical, and administrative resources to support the City with services related to Unity Maintain and supporting business systems.
Assumptions	• To be determined and defined per work authorization. • Technical Support Services will be billed on a time and materials (hourly) basis. • Woolpert will not begin providing support services without the written approval of the City's project manager. • To be determined and defined per work authorization.

Category	Details
Client Responsibilities	- To define the needed support services requested from Woolpert, and to provide written authorization to begin the work. - To be determined and defined per work authorization.

5 PROJECT MANAGEMENT PROCESS

Woolpert utilizes the PMI project management methodology, frequently combining elements of both waterfall and agile approaches. Project Management demands organization, communication, coordination, prioritization skills, attention to detail, and adept problem-solving abilities. Woolpert and the City channel their efforts towards keeping projects on track, within budget, and aligned with scope, pivotal for achieving successful outcomes. To achieve this, the following tasks are outlined for successful project management:

- Client Notice to Proceed
- Project Management Plan
- Resource and Schedule Coordination
- Client Status Meetings
- Internal Status Meetings
- Ad-Hoc Meetings
- Progress Reporting
- Project Administration
- Project Closeout

Woolpert's Project Management approach draws heavily from the best practices of the Project Management Institute (PMI) for project delivery. This approach equips us with the necessary resources, tools, and controls to effectively manage projects across all phases and processes. Below are the phases and details within each phase that encompass our established approach.

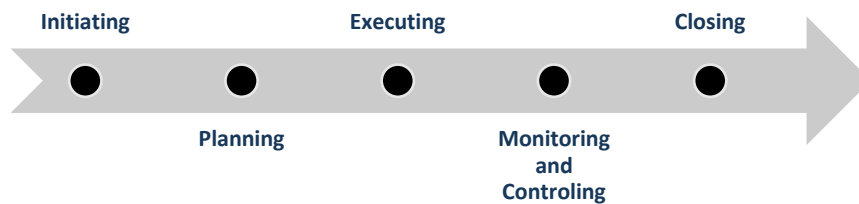


Figure 1:

Overview of

Project Management Phases

Table 2: Project Management Phases

Initiating – Defines the project, objectives, scope, and feasibility. The Initiation phase often includes the project charter, identifying the stakeholders, and planning the details of the project.			
• Notice to Proceed	• Prepare Project Charter	• Define Business Case	
• Identify Stakeholders			
Planning – The planning phase provides the plans required to guide the project execution. This includes defining tasks, resources, schedules, budgets and identifying risks.			

Exhibit A-1

- Requirements Traceability Matrix - RACI Matrix	- Project Management Plan - Work Breakdown Structure (WBS)	- Procurement - Statement of Work - Project Schedule	- Identify Risks and Prepare Risk Register - Budget
Executing - In this phase, the project tasks are performed, resources are allocated, and communication among team members and stakeholders is crucial to ensure that the project stays on track.			
- Project Kick-off - Project Deliverables	- Project Team Oversight - Align Quality Assurance	- Invoicing - Issue and Action Logs	Manage Client Expectations
Monitoring and Controlling - Throughout the project, progress is monitored against the work breakdown structure and scope of work. Adjustments are made as needed to keep the project on schedule, within budget, and in line with quality standards. This phase involves tracking performance, managing changes, and addressing any issues that arise.			
- Internal Coordination Meetings - Quality Control	- Client Project Status Meetings - Progress Reporting	Monitor and Control Project Scope and Budget	- Project Change Control - Manage Stakeholder Expectations
Closing - The final phase includes delivering the final product or service to the customer, obtaining acceptance, documenting lessons learned, and transitioning any remaining resources or deliverables.			
- Final Deliverables - Final Invoicing	Lessons Learned	Survey	Final Project Acceptance

5.1 Project Management Tasks

5.1.1 Notice to Proceed

Upon contract award, Woolpert will request a Notice to Proceed (NTP) from the City. Upon receipt of the signed contract and NTP, Woolpert will commence project setup in our financial system and allocate resources accordingly. The Woolpert project manager plays a pivotal role in facilitating pre-project communication, ensuring that any inquiries regarding scope, schedule, or budgets are addressed during the contracting phase.

5.1.2 Project Management Plan

Woolpert will develop and update the project management plan (PMP) as required, throughout the duration of the project. The PMP modifications will be facilitated upon common agreement between the client and Woolpert in accordance with the issue control process detailed in the project plan.

Woolpert will develop and review the PMP with the client and utilize the plan throughout the project to help guide and ensure project success. The client will review and provide feedback with regards to the PMP. Woolpert will update and deliver the PMP to the client Project Manager for final acceptance. The PMP contains the following content:

Table 2: Project Management Plan Details

PMP Section	Section Description
• Project Charter	• Establishes goals, objectives, and guidelines for the project.
• Roles and Responsibilities	• Identify the Woolpert and Client teams along with role, responsibilities, and contact information.
• Communications Plan	• Outlines the methods of communication and circumstances requiring specific communication.
• Scope Management Plan	• The process outlining how Woolpert will work to align expectations regarding the scope tasks and deliverables to the client.
• Schedule Management Plan	• Process for monitoring and managing project timelines based on variables introduced during the project.
• Budget Management Plan	• Creates controls for budget and value definitions used during the project.
• Quality Control Management Plan	• Defines processes used to ensure a consistent standard of excellence for all work product.
• Risk Management Plan	• Defines procedures for identifying, documenting, mitigating, and tracking project risks.
• Collaboration Site Process	• The process for uploading documents, managing folders, and tabs within the SharePoint/MS Teams site.
• Document Management and Version Control	• Management process for document deliverables, comments, tracking changes, and version control.
• Change Control Process	• Details the process for identifying and evaluating impacts of change to make informed decisions that may alter project delivery.
• Progress and Status Reporting Process	• With the invoices, a progress report will be provided and will be depending on the invoicing cycle, i.e., Monthly % complete, Milestones, etc. Additionally, stakeholder reports that are needed for updates will be provided.
• Issue and Action Log Tracking	• Procedures for issue reporting, tracking, and correction.
• Invoicing Process	• Identify the client requirements for the invoicing process.
Baselines	Section Description
Scope Baseline	Provided at the start of the project to set the baseline
Schedule Baseline	Provided at the start of the project to set the baseline
Cost Baseline	Provided at the start of the project to set the baseline

5.1.3 Schedule Management and Resource Planning

Project schedule coordination and resource planning will be performed using Microsoft Project and Microsoft Dynamics software, respectively. Project schedules and tasks will be monitored and adjusted depending on the client priorities and ability to make its staff and facilities available at the appropriate times throughout the project. An updated project schedule delineating resources, scheduled tasks, and completed tasks will be maintained and available to all Woolpert and City project participants. The

Exhibit A-1

Woolpert project manager will post monthly project schedule updates in both MS Project and PDF formats.

When the project schedule is changed, Woolpert updates the resource planning within MS Dynamics. Therefore, every change made, creates additional updates that are required for keep resource management up to date. Changes to onsite time must be conducted at a minimum of three weeks from traveling. This keeps the costs down for both Woolpert and the City. Woolpert will work with the City to schedule task up to eight (8) weeks in advance.

5.1.4 Client Status Meetings

Woolpert will facilitate regularly occurring status meetings to review overall project progress. Topics covered by our project manager include but are not limited to:

- Activities, action items, budget review, and deliverables completed to date.
- Activities, action items, budget review, and deliverables in progress or scheduled.
- Technical or contractual items that require corrective action.
- Review issue log and risk register.

Woolpert team meeting participants include the project manager and other technical team members, as required. The City meeting participants include the project manager and other team members as deemed necessary by the client project manager or as requested by the Woolpert project manager. When feasible, the status meetings will be held on-site in conjunction with other scheduled on-site tasks. Otherwise, the meetings will be facilitated remotely using Microsoft Teams. The Woolpert project manager will prepare meeting notes that will be posted on the shared Microsoft Teams site shortly after each meeting for the team to review.

5.1.5 Internal Status Meetings.

Internal project meetings will be held among the Woolpert team members with active or upcoming project tasks to ensure consistent communication about progress, schedules, and issues impacting the successful delivery of any task or sub-task. Woolpert's project manager will utilize these meetings to control the resource load throughout the project.

5.1.6 Ad-Hoc Meetings

On an as needed basis, there will be times when the City and/or Woolpert require an unplanned meeting to address project management concerns such as scheduling, risks, budget, and business decisions. There will be a set number of hours allowable for ad-hoc meetings within the project budget.

5.1.7 Progress Reporting

The Woolpert project manager will prepare a progress report that will be presented at the City project status meeting. The report documents accomplishments, planned activities, budget status, issues, risks, and action items. Excel exports of the project plan reflecting completed tasks, task percent completes, task actual versus planned completion dates, and proposed completion dates for future tasks. Additionally, monthly Woolpert will provide a client stakeholder progress report for upper management. This will provide a high-level overview of the project status, risks, budget, and schedule.

5.1.8 Project Administration

With all projects, there are administrative tasks that must be performed, such as project collaboration site establishment and maintenance, and more. Woolpert will provide the following general project management administrative services:

- Coordinate project events with the client project manager and Woolpert team members.
- Author, edit, review, and distribute project documentation and technical reports as required.

Exhibit A-1

- Maintain a secure Microsoft Teams project collaboration website to post project schedule details, in-process tasks, responsible parties, technical documentation, and other project collaboration tools.
- Perform miscellaneous project administration (e.g., arrange travel and internal project updates).
- Anticipate problem areas and propose and facilitate solutions.

5.1.9 Project Closeout

Once the project is complete, Woolpert will work with the City to ensure all scope items are finalized and approved. Woolpert will conduct a survey to determine what the City deemed successful versus areas for improvement. During the closeout process, Woolpert will also discuss the last of the invoicing and additional services required for the client and provide a zipped file of all the deliverable documents. Woolpert will work with the client project manager to perform the official project closeout process.

6 PROJECT BUDGET

The total project fee is **Three hundred sixteen thousand dollars (\$316,000.00)**. Except for Phase 4 (time and materials), all project phases will be billed as a fixed fee.

- Services provided will be performed on either a Firm Fixed Lump-Sum Fee basis, or on a Time & Materials Fee basis, as agreed to between the CLIENT and Woolpert.
- For Firm Fixed Lump-Sum Fee work authorizations, Woolpert will invoice the CLIENT monthly based on an overall percent complete of the work authorization tasks.
- For Time & Material Fee work authorizations, Woolpert will invoice the CLIENT monthly based on the following hourly rates (Rates are valid through December 31, 2026, and are then subject to change). Expenses will be submitted and paid at cost plus ten percent (10%).

6.1 Unity Migration Fee Summary

PSA F002536 2026 / 2027(Fixed Fee)	\$226,000.00
IT	\$141,000.00
Water	\$85,000.00
PSA F002536 2027 / 2028 (Time and Materials)	\$45,000.00
PSA F002536 2028 / 2029(Time and Materials)	\$45,000.00
Total	\$316,000.00

6.2 Hourly Rate Schedule

Resource Description	Min Rate	Max Rate
Program Director	\$240.00	\$311.20
Project Manager	\$215.00	\$269.90
Unity Maintain (Cityworks) SME	\$195.00	\$259.90
GIS SME	\$195.00	\$254.70
Senior Systems Analyst	\$175.00	\$211.45
Systems Analyst	\$140.00	\$194.90
Senior Developer	\$195.00	\$254.70
Developer	\$165.00	\$190.00

7 PROJECT SCHEDULE

WBS	Task Name	Start	Finish	Duration
City of Santa Rosa Environment Upgrade		5/13/2024	10/28/2026	630.75 days
PM	Project Management	3/9/2026	9/2/2026	121 days
1	Phase 1 Design	3/10/2026	4/8/2026	21 days
1.1	Request for Information (RFI)	3/10/2026	3/20/2026	8.25 days
1.1.1	RFI Document Delivery	3/10/2026	3/10/2026	0.25 days
1.1.2	Client to Review and Gather RFI Data	3/10/2026	3/17/2026	5 days
1.1.3	Client to Post Data to the Shared Team Site	3/10/2026	3/17/2026	5 days
1.1.4	RFI Data Review	3/17/2026	3/20/2026	3 days
1.2	Project Kick-off Meeting	3/16/2026	3/19/2026	3.13 days
1.2.1	Draft Kick-Off Meeting Agenda & Submit to Client	3/16/2026	3/16/2026	0.25 days
1.2.2	Prepare Presentation for Kick-off Meeting	3/16/2026	3/16/2026	0.5 days
1.2.3	Kick-Off Meeting / Software Demonstration	3/16/2026	3/16/2026	0.25 days
1.2.4	Submit Kick-Off Meeting Minutes	3/17/2026	3/17/2026	0.13 days
1.2.5	Client to Provide Feedback on Meeting Minutes	3/17/2026	3/18/2026	1 day
1.2.6	Finalize and Close Kick-Off Meeting	3/19/2026	3/19/2026	0.13 days
1.3	Software Upgrade 15.8.9 to Cityworks 23.x	3/12/2026	4/3/2026	14.88 days
1.3.1	City to provide .bak of PROD	3/12/2026	3/13/2026	1 day
1.3.2	Woolpert to Upgrade 15.8.9 to CW23.x (Woolpert Servers)	3/13/2026	3/16/2026	1.75 days
1.3.3	Assess Database Structure (Triggers, Procedures etc.)	3/13/2026	3/16/2026	1.5 days
1.3.4	Test Solution	3/13/2026	3/13/2026	0.75 days
1.3.5	Backup and Send Upgraded DB to Trimble for Restore to Unity	3/16/2026	3/25/2026	8 days
1.3.6	Test Solution	3/26/2026	3/26/2026	0.75 days
1.3.7	Draft and Submit Assessment Document / Transition Plan	3/16/2026	3/26/2026	8 days
1.3.8	City to Review and Provide Feedback	3/26/2026	4/2/2026	4 days

Exhibit A-1

WBS	Task Name	Start	Finish	Duration
1.3.9	Review Dashboards, Prioritize, and Assign Responsibility	4/2/2026	4/3/2026	0.38 days
1.4	Quality control and assurance	3/10/2026	4/8/2026	21 days
1.5	Phase 1 acceptance and close	4/3/2026	4/8/2026	3 days
2	Phase 2 Develop	3/16/2026	5/6/2026	37 days
2.1	Software Orientation Training (Respond 4.3)	3/16/2026	3/26/2026	9 days
2.1.1	Training Agenda and Submit to Client	3/16/2026	3/16/2026	0.25 days
2.1.2	Prepare for Orientation Training	3/20/2026	3/20/2026	0.5 days
2.1.3	Orientation Training	3/23/2026	3/26/2026	4 days
2.1.3.1	Session 1	3/23/2026	3/26/2026	4 days
2.1.3.2	Session 2	3/23/2026	3/23/2026	0.38 days
2.2	Software Configuration	3/23/2026	5/1/2026	28 days
2.2.1	TPW City Services Service Request	3/23/2026	5/1/2026	28 days
2.2.1.1	Configure System	3/23/2026	5/1/2026	28 days
2.2.1.2	Configuration Support	3/23/2026	5/1/2026	28 days
2.2.2	Local Water Service Request	3/23/2026	5/1/2026	28 days
2.2.2.1	Configure System	3/23/2026	5/1/2026	28 days
2.2.2.2	Configuration Support	3/23/2026	5/1/2026	28 days
2.2.3	Regional Service Request	3/23/2026	5/1/2026	28 days
2.2.3.1	Configure System	3/23/2026	5/1/2026	28 days
2.2.3.2	Configuration Support	3/23/2026	5/1/2026	28 days
2.3	Quality control and assurance	3/16/2026	5/6/2026	37 days
2.4	Phase 2 acceptance and close	5/1/2026	5/6/2026	3 days
3	Phase 3 Deploy	4/7/2025	9/16/2026	366 days
3.1	Migrate to Trimble Unity DEV Environment	4/6/2026	5/28/2026	36 days
3.1.1	Woolpert to Submit Ticket to Trimble for Unity	4/6/2026	4/8/2026	3 days
3.1.2	City to provide .bak of PROD	5/6/2026	5/11/2026	3 days
3.1.3	Woolpert to Upgrade 15.8.9 to CW23.x (Woolpert Servers)	5/11/2026	5/13/2026	2 days
3.1.4	Trimble to Migrate CWOL PROD to Unity DEV	5/13/2026	5/20/2026	5 days

Exhibit A-1

WBS	Task Name	Start	Finish	Duration
3.1.5	Woolpert to QAQC New Site	5/20/2026	5/21/2026	1 day
3.1.6	Remote Review Meeting for Cutover Updates	5/27/2026	5/28/2026	2 days
3.2	Software Orientation Training (Trimble Unity)	5/13/2026	6/2/2026	11.63 days
3.2.1	Training Agenda and Submit to Client	5/13/2026	5/15/2026	2 days
3.2.2	Prepare for Orientation Training	5/15/2026	5/20/2026	3 days
3.2.3	Orientation Training	5/27/2026	6/2/2026	5 days
3.2.3.1	Session 1 - Admin	5/27/2026	6/2/2026	5 days
3.2.3.2	Session 2 - Respond	5/27/2026	6/2/2026	5 days
3.3	System Integration Validation	4/7/2025	7/1/2026	315.75 days
3.3.1	Water Billing Integration Testing	3/26/2026	7/1/2026	64 days
3.3.1.1	Validate Integration in Upgraded Environment	3/26/2026	7/1/2026	64 days
3.3.1.2	Provide Integration Troubleshooting and Support	3/26/2026	7/1/2026	64 days
3.3.2	IT Pipes Integration Testing	4/7/2025	7/3/2025	64 days
3.3.2.1	Validate Integration in Upgraded Environment	4/7/2025	7/3/2025	64 days
3.3.2.2	Provide Integration Troubleshooting and Support	4/7/2025	7/3/2025	64 days
3.4	Esri / GIS Support	3/26/2026	3/30/2026	2 days
3.4.1	Remote Support	3/26/2026	3/30/2026	2 days
3.5	Trimble Unity Field (Pilot)	6/8/2026	7/14/2026	23.5 days
3.5.1	Prepare & Submit Cityworks AMS Mobile Solution Workshop Agenda	6/8/2026	6/8/2026	1 day
3.5.2	Prepare for Cityworks AMS Mobile Solution Workshops	6/9/2026	6/10/2026	2 days
3.5.3	Unity Field Discovery Workshops	6/11/2026	6/30/2026	12.25 days
3.5.3.1	Facilitate Remote Discovery Workshops	6/11/2026	6/18/2026	5 days
3.5.3.2	Document & Submit Workshop Decisions Technical Memorandum	6/19/2026	6/24/2026	4 days
3.5.3.3	City to Review Draft Document and Provide Feedback	6/25/2026	6/29/2026	3 days
3.5.3.4	Remote Review Meeting of Memorandum	6/30/2026	6/30/2026	0.25 days

Exhibit A-1

WBS	Task Name	Start	Finish	Duration
3.5.4	Cityworks AMS Mobile Solution Configuration and Deployment	6/30/2026	7/14/2026	8.5 days
3.5.4.1	Configure Cityworks AMS Mobile Solution for Field user by User Group Type	6/30/2026	7/1/2026	1.5 days
3.5.4.2	Test Cityworks AMS Mobile Solution Configurations in a Pilot Area	7/1/2026	7/10/2026	5 days
3.5.4.3	Document Pilot Test Results	7/1/2026	7/10/2026	5 days
3.5.4.4	Provide Remote Pilot Testing Support	7/1/2026	7/10/2026	5 days
3.5.4.5	Support Configuration Updates Based on Pilot Testing Results	7/10/2026	7/14/2026	2 days
3.6	User Acceptance Testing	6/3/2026	8/27/2026	59 days
3.6.1	Technical (TAS / DAS)	6/3/2026	7/8/2026	23 days
3.6.1.1	Client Testing	6/3/2026	7/2/2026	21 days
3.6.1.2	Remote Support	6/3/2026	7/2/2026	21 days
3.6.1.3	Core Team Acceptance	7/7/2026	7/8/2026	2 days
3.6.2	User Community	7/13/2026	8/27/2026	34 days
3.6.2.1	Client Training	7/13/2026	8/24/2026	31 days
3.6.2.2	Client Testing	7/13/2026	8/24/2026	31 days
3.6.2.3	Remote Support	7/13/2026	8/24/2026	31 days
3.6.2.4	User Acceptance	8/25/2026	8/27/2026	3 days
3.7	Transition Planning	7/7/2026	7/15/2026	6.26 days
3.7.1	Update Transition Plan & Submit to Client	7/7/2026	7/13/2026	5 days
3.7.2	Review Document with Client	7/14/2026	7/14/2026	1 day
3.7.3	Update Document Based on Feedback and Submit to Client	7/15/2026	7/15/2026	0.26 days
3.8	Go / No-Go Decision	8/28/2026	8/28/2026	0.25 days
3.8.1	Remote Go-No Go Meeting	8/28/2026	8/28/2026	0.25 days
3.9	Production Launch	9/1/2026	9/11/2026	5.75 days
3.9.1	Execute Transition Plan	9/1/2026	9/3/2026	3 days
3.9.2	Production On-site Support Trip 1	9/9/2026	9/10/2026	2 days
3.9.3	Project Closeout	9/11/2026	9/11/2026	0.75 days
3.10	Quality control and assurance	4/6/2026	9/16/2026	109 days
3.11	Phase 3 acceptance and close	9/11/2026	9/16/2026	3 days

Exhibit A-1

WBS	Task Name	Start	Finish	Duration
4	Technical Support Services (Time and Materials)	9/16/2026	10/7/2026	15 days
4.1	Budget Year 2027 - 2028	9/16/2026	10/7/2026	15 days
4.3	Budget Year 2028 - 2029	9/16/2026	10/7/2026	15 days
99	Travel & Expense	TBD	TBD	1.5 days
99.1	Travel Production (Trip 1)	TBD	TBD	1.5 days

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Final Audit Report

2026-06-05

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