

Purchase Change Request



Marshall University
Office of Purchasing
One John Marshall Drive
Huntington, WV 25755-4100

Order #
070121-JHN

FY 25	Buyer LL	Date 10/18/2024	Account	P.O. Date 07/01/2023	Contract 070121-JHN
----------	-------------	--------------------	---------	-------------------------	------------------------

Document <input type="checkbox"/> Requisition (Cancellation only) <input type="checkbox"/> Regular Purchase Order <input type="checkbox"/> Contract Purchase Order <input checked="" type="checkbox"/> Open End Contract Purchase <input type="checkbox"/> Agreement	Document Action <input type="checkbox"/> Cancellation <input type="checkbox"/> Increase/Decrease <input type="checkbox"/> Unused Balance <input type="checkbox"/> Freight <input type="checkbox"/> Renewal <input type="checkbox"/> Extension Error	<input type="checkbox"/> Error in Total Amount <input type="checkbox"/> Change of Account <input type="checkbox"/> Change of Vendor Name/Address <input checked="" type="checkbox"/> Other
--	--	---

Vendor Name, Address, Phone #, etc. Johnson Controls Inc 108 Craddock Way, Suite 7 Poca, WV 25159	Vendor Code 390380010	BOG Unit Name & Address Marshall University Office of Purchasing One John Marshall Drive Huntington, WV 25755-4100
Ph# 304-755-4353	Fax	FEIN# 390380010

Item#	Quantity	Description of Change	Unit Price	Extended Price
		Change Order # <u>2</u> Sourcewell Contract 070121-JHN for HVAC Systems and Related Services To make the following changes all in accordance with the same terms and conditions, prices, and specifications contained in the original contract and all authorized change orders. Effective Date(s): October 14, 2021 - September 12, 2025 1. Remove the "Marshall Twin Towers Hvac Psa 2024. See page 6 of 070121-JHN co1. 2. Add pricing page from original 070121-JHN contract. See page 6 of this change order. Vendor Contact: Harry Main 304-741-0587 Harry.B.main@jci.com		

Reason for Change: 1. Remove the "Marshall Twin Towers Hvac Psa 2024. See page 6 of 070121-JHN co1. 2. Add pricing page from original 070121-JHN contract. See page 6 of this change order.	Previous Total	\$	Open-end
	Increase	\$	-
	Decrease	\$	-
	New Total	\$	Open-end

Approved: Michelle W. Keeler 10.21.2024
 Authorized Signature Date

N/A
 Attorney General **if** required Date



PLANNED SERVICE RENEWAL

5/8/2024

Mistie Bibbee
Marshall University Residence Services
1 Marshall Dr
Huntington WV 25755-0001

Marshall University Residence Services Psa 2024



Dear Mistie:

Thank you for choosing Johnson Controls to provide the maintenance solution for your facility. We appreciate your business and look forward to continuing as your building technology services partner.

Your current service agreement (1-131129276397) will expire on 06/30/2024. We are pleased to offer a one year continuation of your current agreement for the annual sum of \$27,798.00, to be paid monthly. The scope will remain the same and the term of this contract will be 07/01/2024 to 06/30/2025. Invoices will be sent to:

Marshall University
Accounts Payable
One John Marshall Drive
Huntington WV 25755

To continue service without interruption, please sign below and return to me by 5/31/2024. If you require us to reference a requisition or purchase order on our invoices, please provide a copy of that document when you return this signed notice.

As a manufacturer of mechanical, controls, security and fire systems, we have the expertise and resources to provide proper maintenance and repair services for your facility. With planned service you're getting a solution that can help optimize your building's performance, provide dependability, sustainability and energy efficiency. Your service is delivered with the attention of a local service company backed by the resources of a global organization.

Again, thank you for your business and we look forward to serving you in the coming year. Please do not hesitate to call if I can assist you in any way.

Sincerely,
Johnson Controls

Customer Signature: 

Philip Holland
JOHNSON CONTROLS CHARLESTON
WV CB - 0N26
108 Craddock Way Ste 7
Poca WV 25159-7606
philip.a.holland@jci.com
Phone: (304) 769-4037

Customer Name: Leeann Lemon/Marshall University

Customer Title: Contract Specialist

PO/Requisition #: 070121-JHN CO1



PLANNED SERVICE RENEWAL

5/8/2024

Joe Justice
Marshall University
Fourth Ave & 16th St
Huntington WV 25701-0000

Marshall University Cogs Controls Psa 2024



Dear Joe:

Thank you for choosing Johnson Controls to provide the maintenance solution for your facility. We appreciate your business and look forward to continuing as your building technology services partner.

Your current service agreement (1-131143108775) will expire on 06/30/2024. We are pleased to offer a one year continuation of your current agreement for the annual sum of \$2,274.00, to be paid monthly. The scope will remain the same and the term of this contract will be 07/01/2024 to 06/30/2025. Invoices will be sent to:

Marshall University
Accounts Payable
One John Marshall Drive
Huntington WV 25755

To continue service without interruption, please sign below and return to me by 5/31/2024. If you require us to reference a requisition or purchase order on our invoices, please provide a copy of that document when you return this signed notice.

As a manufacturer of mechanical, controls, security and fire systems, we have the expertise and resources to provide proper maintenance and repair services for your facility. With planned service you're getting a solution that can help optimize your building's performance, provide dependability, sustainability and energy efficiency. Your service is delivered with the attention of a local service company backed by the resources of a global organization.

Again, thank you for your business and we look forward to serving you in the coming year. Please do not hesitate to call if I can assist you in any way.

Sincerely,
Johnson Controls

Customer Signature: *Leeann Lemon*

Philip Holland
JOHNSON CONTROLS CHARLESTON
WV CB - 0N26
108 Craddock Way Ste 7
Poca WV 25159-7606
philip.a.holland@jci.com
Phone: (304) 769-4037

Customer Name: Leeann Lemon/Marshall University

Customer Title: Contract Specialist

PO/Requisition #: 070121-JHN CO1



PLANNED SERVICE RENEWAL

5/8/2024

William Carter
Marshall University Auxiliary Services
1 John Marshall Dr
Huntington WV 25755-0001

Marshall University Aux Svcs Controls Psa 2024



Dear William:

Thank you for choosing Johnson Controls to provide the maintenance solution for your facility. We appreciate your business and look forward to continuing as your building technology services partner.

Your current service agreement (1-130389293064) will expire on 06/30/2024. We are pleased to offer a one year continuation of your current agreement for the annual sum of \$11,814.00, to be paid monthly. The scope will remain the same and the term of this contract will be 07/01/2024 to 06/30/2025. Invoices will be sent to:

Marshall University
Accounts Payable
One John Marshall Drive
Huntington WV 25755

To continue service without interruption, please sign below and return to me by 5/31/2024. If you require us to reference a requisition or purchase order on our invoices, please provide a copy of that document when you return this signed notice.

As a manufacturer of mechanical, controls, security and fire systems, we have the expertise and resources to provide proper maintenance and repair services for your facility. With planned service you're getting a solution that can help optimize your building's performance, provide dependability, sustainability and energy efficiency. Your service is delivered with the attention of a local service company backed by the resources of a global organization.

Again, thank you for your business and we look forward to serving you in the coming year. Please do not hesitate to call if I can assist you in any way.

Sincerely,
Johnson Controls

Customer Signature:

Philip Holland
JOHNSON CONTROLS CHARLESTON
WV CB - 0N26
108 Craddock Way Ste 7
Poca WV 25159-7606
philip.a.holland@jci.com
Phone: (304) 769-4037

Customer Name: Leeann Lemon/Marshall University

Customer Title: Contract Specialist

PO/Requisition #: 070121-JHN CO1



PLANNED SERVICE RENEWAL

5/8/2024

Jamey Montgomery
Marshall University Medical Center
1600 Med Ctr Dr Ste 3408
Huntington WV 25701-0000

Marshall Medical Multisite Controls Psa 2024



Dear Jamey:

Thank you for choosing Johnson Controls to provide the maintenance solution for your facility. We appreciate your business and look forward to continuing as your building technology services partner.

Your current service agreement (1-130350805272) will expire on 06/30/2024. We are pleased to offer a one year continuation of your current agreement for the annual sum of \$31,284.00, to be paid monthly. The scope will remain the same and the term of this contract will be 07/01/2024 to 06/30/2025. Invoices will be sent to:

Marshall University
Accounts Payable
One John Marshall Drive
Huntington WV 25755

To continue service without interruption, please sign below and return to me by 5/31/2024. If you require us to reference a requisition or purchase order on our invoices, please provide a copy of that document when you return this signed notice.

As a manufacturer of mechanical, controls, security and fire systems, we have the expertise and resources to provide proper maintenance and repair services for your facility. With planned service you're getting a solution that can help optimize your building's performance, provide dependability, sustainability and energy efficiency. Your service is delivered with the attention of a local service company backed by the resources of a global organization.

Again, thank you for your business and we look forward to serving you in the coming year. Please do not hesitate to call if I can assist you in any way.

Sincerely,
Johnson Controls

Customer Signature:

Philip Holland
JOHNSON CONTROLS CHARLESTON
WV CB - 0N26
108 Craddock Way Ste 7
Poca WV 25159-7606
philip.a.holland@jci.com
Phone: (304) 769-4037

Customer Name: Leeann Lemon/Marshall University

Customer Title: Contract Specialist

PO/Requisition #: 070121-JHN CO1

*Pulled forward from 070121-JHN master agreement and edited for 070121-JHN co2
changes below are in red*

Building Maintenance Service

Location	Current 2022 Agreement #	2023 Agreement #	Year 2023	Year 2023
			Quarterly	Annual
Marshall Medical (Center for Rural Health)	1-120126893896	TBD	\$2,163.75	\$8,655.00
Marsahl Medical MEB	1-120129091057	TBD	\$906.75	\$3,627.00
Byrd Clinic	1-120126894282	TBD	\$1,281.00	\$5,124.00
Coalfield	n/a	TBD	\$999.50	\$3,998.00
Douglas	n/a	TBD	\$847.50	\$3,390.00
Chris Cline Indoor	n/a	TBD	\$1,180.25	\$4,721.00
Totals			\$7,378.75	\$29,515.00

Building Maintenance Service

Location	Current 2022 Agreement #	2023 Agreement #	Year 2023	Year 2023
			Quarterly	Annual
Auxialy services (Student Center)	1-120123834979	TBD	\$2,786.25	\$11,145.00
Biotechnology	1-120830693181	TBD	\$1,534.50	\$6,138.00
COGS	1-120828151249	TBD	\$536.25	\$2,145.00
MOVC	1-120829081189	TBD	\$536.25	\$2,145.00
Residence Services Controls	1-120122196123	TBD	\$6,556.25	\$26,225.00
Residence Services HVAC Contract	1-122540027721	TBD	\$9,393.00	\$37,572.00
Totals			\$21,342.50	\$85,370.00

Labor Rates

Billed as per Sourcewell Agreement Pricing Table

*Labor Rate applies to travel time to and from facility with a minimum charge of 2 hours. Time travel must be reasonable. Travel rate is subject to change.

Other Quotation:

2.1.1 (pg. 3) The TSP shall provide all supervision, labor, materials, spare parts, supplies, equipment, transportation and services, whether or not specifically mentioned in these documents, to monitor and maintain the Building Management System and controls and instrumentation currently installed and any future equipment may be installed.

2.7 (pg. 9) Repair service includes all repair, replacement and adjustment of equipment in response to conditions discovered during performance of preventive service, equipment breakdown/improper operation, or University complaint.

Johnson Controls planned service proposal

Prepared for MARSHALL UNIVERSITY MID OHIO VALLEY CENTER

Customer
MARSHALL UNIVERSITY MID OHIO VALLEY
CENTER

Local Johnson Controls Office
108 CRADDOCK WAY STE 7
POCA, WV 25159-7606

Agreement Start Date:
07/01/2024

Proposal Date
07/02/2024

Estimate No:
1-1OWSRSV1



Partnering with you to deliver value-driven solutions

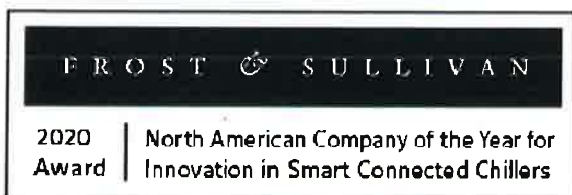
Every day, we transform the environments where people live, work, learn and play. From optimizing building performance to improving safety and enhancing comfort, we are here to power your mission.

A Planned Service Agreement with Johnson Controls provides you with a customized service strategy designed around the needs of your facility. Our approach features a combination of scheduled, predictive and preventative maintenance services that focus on your goals.

As your building technology services partner, Johnson Controls delivers an unmatched service experience delivered by factory-trained, highly skilled technicians who optimize operations of the buildings we work with, creating productive and safe environments for the people within.

By integrating our service expertise with innovative processes and technologies, our value-driven planned service solutions deliver sustainable results, minimize equipment downtime and maximize occupant comfort.

With more than a century of healthy buildings expertise, Johnson Controls leverages technologies to successfully deliver smart solutions to facilities worldwide.



Johnson Controls was recognized by Frost & Sullivan as the 2020 North American Company of the Year for innovation in the Smart connected Chillers market

Sharon Lauer 07/30/2024

Executive summary

Planned service proposal for MARSHALL UNIVERSITY MID OHIO VALLEY CENTER

Dear Joe Justice,

We value and appreciate your interest in Johnson Controls as a service provider for your building systems and are pleased to provide a value-driven maintenance solution for your facility. The enclosed proposal outlines the Planned Service Agreement we have developed on your facility.

Details are included in the Planned Service Agreement summary (Schedule A), but highlights are as follows:

- In this proposal we are offering a service agreement for 1 Year starting **07/01/2024** and ending **06/30/2025**.
- The agreement price for first year is **\$3,920.00**; see Schedule A, Supplemental Price and Payment Terms, for pricing in subsequent years.
- The equipment options and number of visits being provided for each piece of equipment are described in Schedule A, Equipment list.

As a manufacturer of both mechanical and controls systems, Johnson Controls has the expertise and resources to provide proper maintenance and repair services for your facility.

Again, thank you for your interest in Johnson Controls and we look forward to becoming your building technology services partner.

Please contact me if you have any questions.

Sincerely,

Harry Main
HVAC Account AE
(304) 755-4353

[The power behind your mission](#)

Benefits of planned service

A Planned Service Agreement with Johnson Controls will allow you to optimize your building's facility performance, providing dependability, sustainability and energy efficiency. You'll get a value-driven solution that fits your specific goals, delivered with the attention of a local service company backed by the resources of a global organization.

With this Planned Service Agreement, Johnson Controls can help you achieve the following five objectives:



1. **Identify energy savings Opportunities**
 Since HVAC equipment accounts for a major portion of a building's energy usage, keeping your system performing at optimum levels may lead to a significant reduction in energy costs.
2. **Reduce future repair costs**
 Routine maintenance may maximize the life of your equipment and may reduce equipment breakdowns.
3. **Extend asset life**
 Through proactive, factory-recommended maintenance, the life of your HVAC assets may be extended, maximizing the return on your investment.
4. **Ensure productive environments**
 Whether creating a comfortable place where employees can be productive or controlling a space to meet specialized needs, maintenance can help you achieve an optimal environment for the work that is being accomplished
5. **Promote environmental health and safety**
 When proper indoor conditions and plant requirements are maintained, business outcomes may be improved by minimizing sick leave, reducing accidents, minimizing greenhouse gas emissions and managing refrigerant requirements.

All of the services we perform on your equipment are aligned with "The 5 Values of Planned Maintenance" and our technicians understand how the work they perform can help you accomplish your business objectives.

Our partnership

Personalized account management

A Planned Service Agreement also provides you with the support of an entire team that knows your site and can closely work with you on budget planning and asset management. Your local Johnson Controls account management team can help guide planned replacement, energy retrofits and other building improvement projects. You'll have peace of mind that an entire team of skilled professionals will be looking out for what is best for your facility and budget.

A culture of safety

Johnson Controls technicians take safety seriously and personally, and integrate it into everything they do. All of our technicians participate in regular and thorough safety training. Because of their personal commitment, we are a leader in the HVAC service industry for workplace safety performance. This means that you do not have to worry about us when we are on your site.

Commitment to customer satisfaction

Throughout the term of your Planned Service Agreement, we will periodically survey you and use your feedback to continue to make improvements to our service processes and products. Our goal is to deliver the most consistent and complete service experience possible. To meet this goal, we've developed and implemented standards and procedures to ensure you receive the ultimate service experience – every time.

Energy & sustainability

A more sustainable world one building at a time – Johnson Controls is a company that started more than 125 years ago with a product that reduced energy use in buildings. We've been saving energy for customers ever since. Today, Johnson Controls is a global leader in creating smart environments where people live, work and play, helping to create a more comfortable, safe and sustainable world.

The value of integrity

Johnson Controls has a long, proud history of integrity. We do what we say we will do and stand behind our commitments. Our good reputation builds trust and loyalty. In recognition for our commitment to ethics across our global operations, we are honored to be named one of the World's Most Ethical Companies by Ethisphere Institute, a leading think tank dedicated to business ethics and corporate social responsibility. In addition, Corporate Responsibility Magazine recognizes Johnson Controls as one of the top companies in its annual "100 Best Corporate Citizens" list.

Service delivery

As part of the delivery of this Planned Service Agreement, Johnson Controls will dedicate a local customer service agent responsible for having a clear understanding of the agreement scope, and your facility procedures and protocols.

A high-level overview around our service delivery process is outlined below including scheduling, emergency service, on-site paperwork, communication and performing repairs outside of the agreement scope.

Scheduling

Preventative maintenance service will be scheduled using our automated service management system. In advance of the scheduled service visit, our technician is sent a notice of service to a smartphone. Once the technician acknowledges the request, your customer service agent will call or e-mail your on-site contact to let you know the start date and type of service scheduled.

The technician checks in, wears personal protective equipment, performs the task(s) as assigned, checks out with you and asks for a screen capture signature on the smartphone device. A work order is then e-mailed, faxed or printed for your records.

Emergency services

Emergency service can be provided 7 days a week, 24 hours a day, 365 days a year. During normal business hours, emergency service will be coordinated by the customer service agent. After hours, weekends and holidays, the emergency service number transfers to the Johnson Controls after-hours call center and on-call technicians are dispatched as needed.

Johnson Controls is committed to dispatching a technician within hours of receiving your call through the service line. A work order is e-mailed, faxed or printed for your records. Depending on the terms of your agreement, you may incur charges for after hour services.

Communication

A detailed communication plan will be provided to you so you know how often we will provide information to you regarding your Planned Service Agreement. The communication plan will also provide you with your main contacts at Johnson Controls.

Approval process for non-covered items

Johnson Controls will adhere to your procurement process. No work will be performed outside of the agreement scope without prior approval. Johnson Controls will work with you closely to ensure your procurement process is followed before any non-covered item work is started.

Summary of services and options

Comprehensive and operational inspections

During comprehensive and operational inspections, Johnson Controls will perform routine checks of the equipment for common issues caused by normal wear and tear on the equipment. Additional tests can be run to confirm the equipment's performance.

Routine maintenance, such as lubrication, cleaning and tightening connections, can be performed depending on the type of equipment being serviced. Routine maintenance is one of the keys to the five values of maintenance – it can help identify energy saving opportunities, reduce future repair costs, extend asset life, ensure productive environments, and promote health and safety.

Operational Visit/Supervisory Controls System Verification

Based on our expertise and factory recommendations, we will execute routine preventative maintenance on the supervisory controllers and servers in your Metasys system. The inspection includes the following tasks:

- Visual inspection of the control panel and cleaning as needed.
- Review of alarms, points which are offline, out of service and overridden points.
- Local backups of controllers, objects, and server repositories.
- Review security database and ensure default passwords are changed.

Advantages: Provides proactive identification of problems, which helps maintain productive environments, identify energy efficiency opportunities, reduce future repairs and extend the life of your equipment.

Customer Portal / Service Information Access

The Johnson Controls customer portal is the online gateway to easily access various elements of your service information. This real-time, self-service mechanism is just one more way for you to stay in touch with our service within your facilities. Using the internet, you can view service call history by location, monitor agreements, as well as view asset and invoice information.

Summary

Thank you for considering Johnson Controls as your building technology services partner. The following agreement document includes all the details surrounding your Planned Service Agreement.

With planned service from Johnson Controls, you'll get a value-driven solution that can help optimize your building controls and equipment performance, providing dependability, sustainability and energy efficiency. You'll get a solution that fits your specific goals, delivered with the attention of a local service company backed by the resources of a global organization.

The power behind **your mission**

Vendor/Customer

[Menu](#)

Vendor/Customer	Legal Name	Alias/DBA	Vendor Active Status	Customer Active Status	Previous Name
✓ 000000182539	JOHNSON CONTROLS INC		Active	Inactive	

From 1 to 1 of 1 First Prev Next Last [Attachments](#)

Save [Undo](#) Delete Insert [Copy](#) Paste [Search](#)

▼ General Info

Vendor/Customer : 000000182539	Restrict Use by Department : <input type="checkbox"/>
Legal Name : JOHNSON CONTROLS INC	Miscellaneous Account : <input type="checkbox"/>
Alias/DBA :	Internal Account : <input type="checkbox"/>
Vendor Active Status : Active ▼	Third Party Only : <input type="checkbox"/>
Vendor Approval Status : Complete	Third Party Vendor : <input type="checkbox"/>
Customer Active Status : Inactive ▼	Third Party Customer : <input type="checkbox"/>
Customer Approval Status : Incomplete	Inventory Customer : <input type="checkbox"/>
Location Name :	Healthcare Provider : <input type="checkbox"/>
First Name :	Never Archive : <input type="checkbox"/>
Middle Name :	Restrict VSS Access : No ▼
Last Name :	Discontinue - No New Business : <input type="checkbox"/>
Company Name : JOHNSON CONTROLS INC	Prevent MA Reference : <input type="checkbox"/>
Previous Name :	PunchOut Enabled : <input type="checkbox"/>
Previous Street :	Re-PunchOut Enabled : <input type="checkbox"/>
Previous City :	Electronic Order Enabled : <input type="checkbox"/>
Previous State/Province :	W-9 Received : <input checked="" type="checkbox"/>
Previous Country :	W-9 Received Date : 06/15/2021
	W-8 Received : <input type="checkbox"/>
	W-8 Received Date :
	Accepts Credit Cards : <input type="checkbox"/>
	Active From : 02/26/1990
	Active To :
	Last Usage Date : 10/17/2024
	Department :
	Unit :

▶ Headquarters

▶ Organization

▶ Disbursement Options

▶ Prenote/EFT

▶ Remittance Advice

▶ Vendor Terms

▶ Accounts Receivable

▶ eMALL

▶ Location Information

▶ Fee and Vendor Compliance Holds

Fee Exempt : <input type="checkbox"/>	Tax Clearance : <input type="checkbox"/>
Registration Application Date : 07/01/2024	Unemployment Insurance : <input type="checkbox"/>
Registration Effective Date : 07/01/2024	Worker's Compensation : <input type="checkbox"/>
Registration Expiration Date : 07/01/2025	Secretary of State Registration : <input type="checkbox"/>
Pre-Registration Code :	Federal Debarred : <input type="checkbox"/>

▶ Executive Compensation

▶ Additional Information

▶ Travel

▶ Change Management

[Top](#)

CREATE DOCUMENT> [Create New Record](#) [Modify Existing Record](#)

UPDATE> [Headquarters](#) [Add 1099 Information Entry](#) [Add 1042-S Reporting Information Entry](#) [Vendor Business Types By Commodity](#)

SEARCH BY> [Master Contacts](#) [Master Addresses](#) [Vendor Commodity](#) [Vendor Addresses](#) [Vendor Business Types](#) [Vendor Service Areas](#) [VCM Query](#)
[Historical Vendor Information](#) [Vendor Notes](#)
[Vendor Transaction History](#)