Purchase Order # Marshall University Office of Purchasing 070121-JHN **Change Request** One John Marshall Drive Huntington, WV 25755-4100 FY P.O. Date Buyer Date Account Contract 07/01/2023 070121-JHN 25 LL 11/15/2024 **Document Action Document** Error in Total Amount Cancellation Requisition (Cancellation only) Change of Account ☐ Increase/Decrease Regular Purchase Order Change of Vendor Name/Address Unused Balance Contract Purchase Order ✓ Other Freight Open End Contract Purchase ∇ Renewal Agreement Extension Error $_{Vendor\;Code}\,390380010$ Vendor Name, Address, Phone #, etc. **BOG Unit Name & Address** Marshall University Johnson Controls Inc Office of Purchasing 108 Craddock Way, Suite 7 One John Marshall Drive Poca, WV 25159 Huntington, WV 25755-4100 Ph# 304-755-4353 Fax FEIN#390380010 Description of Change Unit Price **Extended Price** Item# Quantity Change Order # 3 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. Add the "Marshall University Residence Services - Twin Towers" HVCA PSA 2024. See page 2. 2. Add updated price page. See page 17. Vendor Contact: Harry Main 304-741-0587 Harry.B.main@jci.com

2. Add updated price page. See page 17. Decrease New Total Open-end November 15, 2024 Approved:

Previous Total

Increase

Authorized Signature

Open-end

Reason for Change: 1. Add the "Marshall University Residence Services - Twin Towers" HVCA PSA 2024. See page 2.

Attorney General if required

Date

Date

Johnson Controls planned service proposal Prepared for MARSHALL UNIVERSITY RESIDENCE SERVICES TWIN TOWERS

Customer

MARSHALL UNIVERSITY RESIDENCE SERVICES – TWIN TOWERS

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

Agreement Start Date: 07/01/2024

Proposal Date 11/06/2024

Estimate No: 1-10IGESVC



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

Executive summary

Planned service proposal for MARSHALL UNIVERSITY RESIDENCE SERVICES TWIN TOWERS

Dear Bob Easthom,

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 \$37,572.00; 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,

Heather Jackson Service Manager (220) 228-0543

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:

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.

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

Planned Service Agreement

Customer Name: MARSHALL UNIVERSITY RESIDENCE SERVICES – TWIN TOWERS

Address: 1 MARSHALL DR HUNTINGTON, WV 25755-0001

Proposal Date: 11/06/2024 Estimate #: 1-10IGESVC

Scope of Service

Johnson Controls, Inc. ("JCI") and the Customer (collectively the "Parties") agree Preventative Maintenance Services, as defined in Schedule A ("Services"), will be provided by JCI at the Customer's facility. This Planned Service Agreement, the Equipment List, Supplemental Price and Payment Terms, Terms and Conditions, and Schedules attached hereto and incorporated by this reference as if set forth fully herein (collectively the "Agreement"), cover the rights and obligations of both the Customer and JCI.

Extended Service Options for Premium Coverage

If Premium Coverage is selected, on-site repair services to the equipment will be provided as specified in this Agreement for the equipment listed in the attached Equipment List.

Equipment List

Only the equipment listed in the Equipment List will be covered as part of this Agreement. Any changes to the Equipment List must be agreed upon in writing by both Parties.

Term / Automatic Renewal

This Agreement takes effect on 07/01/2024 and will continue until 06/30/2025 ("Original Term"). The Agreement will automatically renew and extend for successive terms equal to the Original Term unless the Customer or JCI gives the other written notice it does not want to renew prior to the end of the then-current term (each a "Renewal Term"). The notice must be delivered at least (90) days prior to the end of the Original Term or of any Renewal Term. The Original Term and any Renewal Term may be referred to herein as the "Term". Renewal price adjustments are discussed in the Terms and Conditions.

Refrigerant Charges

Refrigerant is not included under this Agreement and will be billed separately to the Customer by JCI.



Price and Payment Terms

The total Contract Price for JCl's Services during the first year of the Original Term is \$37,572.00. This amount will be paid to JCl in advance in Monthly installments. Pricing for each subsequent year of a multiyear Original Term is set forth in the Supplemental Price and Payment Terms. Unless otherwise agreed to by the parties, All payments will be due upon receipt. Renewal price adjustments are set forth in the Terms and Conditions.

Title:	Date:	Title:	Date:				
JCI Manager Signature:		Customer Manag	Customer Manager Signature:				
JCI Managei	r:	Customer Manage	Customer Manager:				
JOHNSON	N CONTROLS Inc.						
This pr	roposal is valid for thirty days from th	e proposal date.					
[]	No: Please submit via :						
[]	No: Please submit invoices via mail						
[]	YES: E-mail address to be used :						
AR Inv	oices are accepted via e-mail:						
[]	number :						
[]	No: This signed contract satisfies requ YES: Please reference this PO	uirement					
PO is r	equired to facilitate billing:						
informa		any's billing requiremen	s, please provide the following				
Invoice	s will be sent to the following location:	ACCOUNTS PAYABL ONE JOHN MARSHA HUNTINGTON,WV 25	E LL DRIVE				
Invoice	s will be sent to the following location:	MARSHALL UNIVERS	SITY				



Branch Email:

JCI Branch: JOHNSON CONTROLS CHARLESTON WV CB - 0N26

Address: 108 CRADDOCK WAY STE 7

POCA,WV 25159-7606 Branch Phone:(866) 300-7647

Schedule A - Equipment List

MARSHALL UNIVERSITY RESIDENCE **SERVICES – TWIN TOWERS**

1 MARSHALL DR **HUNTINGTON, WV 25755-0001**

Product: Block Hours - Mechanical Heavy

Quantity:

Coverage Level: Basic **Services Provided**

Preventive Maintenance

Customer Tag Manufacturer Model # Serial #

Heat Recovery Wheel Cleaning -

MAU-4

Product: Block Hours - Mechanical Heavy

Quantity:

Coverage Level: Basic **Services Provided**

Preventive Maintenance

Customer Tag **Manufacturer** Model # Serial #

Heat Recovery Wheel Cleaning -

Product: Roof Top Unit (RTU), Cooling/Gas Heating, with Economizer, 25.5-60 Tons

Quantity: **Services Provided**

Coverage Level: Premium

Gas Heating Comprehensive 1

(with Economizer)

10 Operational (Mid Season -

Cooling/Heating with

Economizer)

2 Condenser Coil Cleaning

Belt Change 1

1 Cooling Comprehensive (with

Economizer)

Standard Filter Change 12

Model # Customer Tag **Manufacturer** Serial # WH-2-18E-WW-HG-A MAU-4 RTU 00819261-C08877 Governaire

CCU404-X-P

Governaire

WH-2-18E-WW-HG-A

00819526-C08930

CCU404-X-P

Product: Block Hours - Mechanical Heavy

MAU-6 RTU

Johnson Controls Planned Service Proposal

Prepared for MARSHALL UNIVERSITY RESIDENCE SERVICES – TWIN TOWERS

Quantity: 1			Services	Provided
Coverage Level:	Basic		1	Repair Materials
_				
<u>Customer Tag</u>		<u>Manufacturer</u> <u>M</u>	odel#	<u>Serial #</u>

Equipment tasking

Block Hours - Mechanical Heavy

Preventive Maintenance Check with appropriate the Check with approximate the Check with a check with

Check with appropriate customer representative for operational deficiencies

Perform scheduled block hour tasks

Complete any required maintenance checklists, report observations to

appropriate customer representative

Roof Top Unit (RTU), Cooling/Gas Heating, with Economizer, 25.5-60 Tons

Belt Change All work must be performed in accordance with Johnson Controls safety policies

Check with appropriate customer representative for operational deficiencies

Perform belt change procedures

Remove and dispose any debris from any maintenance activity

Document tasks performed during visit and report any observations to

appropriate customer representative

Standard Filter Change All work must be performed in accordance with Johnson Controls safety policies

Check with appropriate customer representative for operational deficiencies

Turn equipment off Remove dirty filters Install new filters Turn equipment on

Dispose of dirty filter appropriately

Document tasks performed during visit and report any observations to

appropriate customer representative

Condenser Coil

Cleaning

All work must be performed in accordance with Johnson Controls safety policies

Check with appropriate customer representative for operational deficiencies

Rinse coil(s) thoroughly with water

Remove and dispose any debris from any maintenance activity Document tasks performed during visit and report any observations to

appropriate customer representative

Cooling Comprehensive

(with Economizer)

All work must be performed in accordance with Johnson Controls safety policies Check with appropriate customer representative for operational deficiencies

Review control panel for proper operation and recorded fault histories (if

applicable)

Check and tighten electrical connections

Check VFD operation and clean cooling fan intake (if applicable)

Check contactor(s)

Check condition of condenser coil Check condition of evaporator coil Check condenser fan motors and blades

Check blower motor operation

Lubricate blower and motor bearings

Check economizer operation

Lubricate and adjust economizer damper linkages Verify proper operation of exhaust motor (if applicable) Check condition and alignment of pulley and belts

Check condition of filters

Clean condensate pan and clear drain line Check for visual signs of refrigerant/oil leak(s)



Check for unusual noise and vibration Record and log all operating parameters

Check overall condition of unit

Remove and dispose any debris from any maintenance activity Document tasks performed during visit and report any observations to appropriate customer representative

Gas Heating Comprehensive (with Economizer) All work must be performed in accordance with Johnson Controls safety policies Check with appropriate customer representative for operational deficiencies

Check and tighten electrical connections

Check contactor(s)

Check combustion blower motor operation

Check igniter and pilot operation Check condition of heat exchanger

Check condition of burners and clean as required in place

Check for proper venting

Check for leaks on gas line (within cabinet)

Check condition of pulley and belts Check economizer operation

Lubricate and adjust economizer damper linkages Verify proper operation of exhaust motor (if applicable)

Check condition of filters

Check for unusual noise and vibration

Check overall condition of unit

Remove and dispose any debris from any maintenance activity Document tasks performed during visit and report any observations to appropriate customer representative

Operational (Mid Season -Cooling/Heating with Economizer) All work must be performed in accordance with Johnson Controls safety policies Check with appropriate customer representative for operational deficiencies Review control panel for proper operation and recorded fault histories (if applicable)

Check condition of condenser coil Check condition of evaporator coil Check condenser fan motors and blades

Check blower motor operation Check economizer operation

Check heating operation (when applicable)

Check condition of pulley and belts

Check condition of filters Check condensate drain

Check for visual signs of refrigerant/oil leak(s)

Visually inspect electrical connections Check for unusual noise and vibration

Check overall condition of unit

Document tasks performed during visit and report any observations to appropriate customer representative

Supplemental Price & Payment Terms (Applies to Multi-Year Contracts Only)

Year Total Annual Dollar Amount Payment Frequer	псу
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Special Additions and Exceptions

This agreement includes the following discounts on additional labor and material work outside the scope of the contract. Discounts apply to current pricing and rates and are subject to renegotiation.

Labor Discount: 15.5%

\$27,798.00

\$37,572.00

\$83,378.00

1 - 134481761435 \$ 2,316.50

\$ 3,131.00

\$ 6,948.17

Building Maintenance Service						
				Year 2024	Year 2024	
Location	2022 Agreement #	2023 Agreement #	2024 Agreement #	Monthly	Annual	
Marshall Medical (Center for Rural Health)	1-120126893896	TBD	1 - 134112558342	\$ 2,607.00	\$10,169.52	
Marsahll Medical MEB	1-120129091057	עסו	1 - 134112558342	\$ 464.50	\$ 5,574.24	
Byrd Clinic	1-120126894282	TBD	1 - 134112558342	\$ 586.94	\$ 7,043.28	
Coalfield	n/a	TBD		\$ 247.35	\$ 2,968.20	
Douglas	n/a	TBD		\$ 206.97	\$ 2,483.64	
Chris Cline Indoor	n/a	TBD		\$ 253.76	\$ 3,045.12	
Totals				\$ 4,366.52	\$31,284.00	
Building Maintenance Service						
				Year 2024	Year 2024	
Location	2022 Agreement #	2023 Agreement #	2024 Agreement #	Monthly	Annual	
Auxialy services (Student Center)	1-120123834979	TBD	1 -133993276776	\$ 984.50	\$11,814.00	
Biotechnology	1-120830693181	TBD	-411	NA	NA	
COGS	1 120020151240	TBD		\$ 189.50	\$2,274.00	
0003	1-120828151249	100	1 - 133890046484	\$ 105.50	72,274.00	

Labor Rates

Totals

Billed as per Sourcewell Agreement Pricing Table

TBD

TBD

1-120122196123

1-122540027721

Other Quotation:

Residence Services Controls

Residence Services HVAC Contract

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.

^{*}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.

Menu

Vendor/Customer	Leg	gal Name	Alias/DBA	Vendor Active Status	Custo	omer Active Statu	s Previous Name	
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	Name: JOH	INSON CONTROL	SINC	Internal Acco				
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Registration Effect	ive Date : 0	7/01/2024		Worker's Compen				
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