


<b>Purchase Change Request</b>					Marshall University Office of Purchasing One John Marshall Drive Huntington, WV 25755-4100	<b>Order #</b> MU21HHCHILLER (P2101781)	
FY 2022	Buyer AWN	Date 5/31/2022	Account	P.O. Date 5/10/2021	Contract MU21HHCHILLER		
<b>Document</b> <input type="checkbox"/> Requisition (Cancellation only) <input type="checkbox"/> Regular Purchase Order <input checked="" type="checkbox"/> Contract Purchase Order <input type="checkbox"/> Open End Contract Purchase <input type="checkbox"/> Agreement			<b>Document Action</b> <input type="checkbox"/> Cancellation <input checked="" type="checkbox"/> Increase/Decrease <input type="checkbox"/> Unused Balance <input type="checkbox"/> Freight <input checked="" type="checkbox"/> Renewal <input type="checkbox"/> Extension Error				
Vendor Name, Address, Phone #, etc. Casto Technical Services Inc 540 Leon Sullivan Way, PO Box 627 Charleston, WV 25322			Vendor Code		BOG Unit Name & Address Marshall University Office of Purchasing One John Marshall Drive Huntington, WV 25755-4100		
Ph# 304-346-0549 Fax			FEIN# 550539180				
Item#	Quantity	Description of Change				Unit Price	Extended Price
		<p style="text-align: center;"><b>Change Order # 1</b></p> <p>To renew the contract according to all terms, conditions, and specifications contained in the original contract. To increase the yearly pricing agreement by 1.5% as contained in the proposal dated 5/2/2022.</p> <p><b>CHILLER MAINTENANCE AND REPAIR</b></p> <p>Original Yearly Cost: \$23,901.00 (monthly rate: \$1,991.75)          Increase: \$360.00 (monthly increase: \$30.00)          New Yearly Cost: \$24,261.00 (monthly rate: \$2,021.75)</p> <p>Renewal and Increase Effective: 5/1/2022 - 4/30/2023</p>					
Reason for Change: To renew contract and increase pricing						Previous Total	\$ 23,901.00
						Increase	\$ 360.00
						Decrease	\$
						New Total	\$ 24,261.00

Approved:

Authorized Signature

*Bucky Wallace*

Date

*5/31/2022*

N/A

Attorney General if required

Date



Marshall University  
Harless Hall  
One John Marshall Drive  
Huntington, WV 25755

May 2, 2022

**RE: Purchas Order # P2101781**

It has been our pleasure serving you this past year. Our records indicate that your HVAC Maintenance Agreement will expire on **April 30, 2022**. Under the terms and conditions of your existing Agreement, the pricing is reviewed annually.


Based upon this annual review, we propose the following:

The current Agreement price is **\$23,901** billed in monthly payments of **\$1,991.75**. Casto Technical Services understands that these are tough economic times, and we are making every effort to control the costs for our valued customers. Inflation has affected us all. As of today, the cumulative rate of inflation is **4.7%**. Casto wants to be fair to our valued customers. Therefore, we are requesting a **1.5%** increase for your agreement renewal.

With the proposed increase, the renewal price will be **\$24,261**, billed in monthly payments of **\$2,021.75**. The renewal will begin **May 1, 2022** and expire on **April 30, 2023**. The labor rate and terms and conditions of the agreement will remain the same.

We thank you for using Casto Technical Services as a vendor for your HVAC needs, and we look forward to continuing to serve you.

Sincerely,

  
Name: April Dunlap  
Inside Sales Support

  
Authorized Signature

**We Make Building Work...BETTER!!!**

**ACORD**<sup>TM</sup>**CERTIFICATE OF LIABILITY INSURANCE**

DATE (MM/DD/YYYY)

3/29/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> <b>McGriff Insurance Services</b> <b>300 Summers Street, Suite #650</b> <b>Charleston, WV 25301</b> <b>304 346-0806</b>		<b>CONTACT NAME:</b> Janet Poling <b>PHONE (A/C, No, Ext):</b> 304 346-0806 <b>FAX (A/C, No):</b> 888 751-3002 <b>E-MAIL ADDRESS:</b> CertificatesVAWV@mcgriff.com															
<b>INSURED</b> <b>Casto Technical Services Inc</b> <b>P O Box 627</b> <b>Charleston, WV 25322</b>		<table border="1"> <thead> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A : Phoenix Insurance Company</td> <td>25623</td> </tr> <tr> <td>INSURER B : Travelers Property Casualty Co of Amer</td> <td>25674</td> </tr> <tr> <td>INSURER C : Travelers Indemnity Co of CT</td> <td>25682</td> </tr> <tr> <td>INSURER D : Charter Oak Fire Insurance Company</td> <td>25615</td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </tbody> </table>		INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : Phoenix Insurance Company	25623	INSURER B : Travelers Property Casualty Co of Amer	25674	INSURER C : Travelers Indemnity Co of CT	25682	INSURER D : Charter Oak Fire Insurance Company	25615	INSURER E :		INSURER F :	
INSURER(S) AFFORDING COVERAGE	NAIC #																
INSURER A : Phoenix Insurance Company	25623																
INSURER B : Travelers Property Casualty Co of Amer	25674																
INSURER C : Travelers Indemnity Co of CT	25682																
INSURER D : Charter Oak Fire Insurance Company	25615																
INSURER E :																	
INSURER F :																	

**COVERAGES****CERTIFICATE NUMBER:****REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> <b>XCU Included</b> <input checked="" type="checkbox"/> <b>Contractual Liab.</b> GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	X	X	DTC07H238280	10/27/2021	10/27/2022	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$300,000 MED EXP (Any one person) \$5,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COM/OP AGG \$2,000,000 \$
D	<b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY	X	X	8106N9734012	10/27/2021	10/27/2022	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
B	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$10,000	X	X	CUP8J31294A2	10/27/2021	10/27/2022	EACH OCCURRENCE \$5,000,000 AGGREGATE \$5,000,000 \$
C	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y <input checked="" type="checkbox"/> N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		X	UB7J35462A21 Includes Employers 23-4-2	10/27/2021 WV Broad Liability of WV	10/27/2022 Form Section Code	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**\*\* Workers Comp Information \*\*****Other States Coverage****Proprietors/Partners/Executive Officers/Members Excluded:**

H N Casto Jr, Officer

Thomas Casto, Officer

(See Attached Descriptions)

**CERTIFICATE HOLDER****CANCELLATION**

**Marshall University**  
**One John Marshall Drive**  
**Huntington, WV 25755**

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

*Gregory T. Gordon*

© 1988-2015 ACORD CORPORATION. All rights reserved.

STATE OF WEST VIRGINIA  
Purchasing Division

## PURCHASING AFFIDAVIT

**CONSTRUCTION CONTRACTS:** Under W. Va. Code § 5-22-1(i), the contracting public entity shall not award a construction contract to any bidder that is known to be in default on any monetary obligation owed to the state or a political subdivision of the state, including, but not limited to, obligations related to payroll taxes, property taxes, sales and use taxes, fire service fees, or other fines or fees.

**ALL CONTRACTS:** Under W. Va. Code §5A-3-10a, no contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and: (1) the debt owed is an amount greater than one thousand dollars in the aggregate; or (2) the debtor is in employer default.

**EXCEPTION:** The prohibition listed above does not apply where a vendor has contested any tax administered pursuant to chapter eleven of the W. Va. Code, workers' compensation premium, permit fee or environmental fee or assessment and the matter has not become final or where the vendor has entered into a payment plan or agreement and the vendor is not in default of any of the provisions of such plan or agreement.

**DEFINITIONS:**

**"Debt"** means any assessment, premium, penalty, fine, tax or other amount of money owed to the state or any of its political subdivisions because of a judgment, fine, permit violation, license assessment, defaulted workers' compensation premium, penalty or other assessment presently delinquent or due and required to be paid to the state or any of its political subdivisions, including any interest or additional penalties accrued thereon.


**"Employer default"** means having an outstanding balance or liability to the old fund or to the uninsured employers' fund or being in policy default, as defined in W. Va. Code § 23-2c-2, failure to maintain mandatory workers' compensation coverage, or failure to fully meet its obligations as a workers' compensation self-insured employer. An employer is not in employer default if it has entered into a repayment agreement with the Insurance Commissioner and remains in compliance with the obligations under the repayment agreement.

**"Related party"** means a party, whether an individual, corporation, partnership, association, limited liability company or any other form or business association or other entity whatsoever, related to any vendor by blood, marriage, ownership or contract through which the party has a relationship of ownership or other interest with the vendor so that the party will actually or by effect receive or control a portion of the benefit, profit or other consideration from performance of a vendor contract with the party receiving an amount that meets or exceeds five percent of the total contract amount.

**AFFIRMATION:** By signing this form, the vendor's authorized signer affirms and acknowledges under penalty of law for false swearing (W. Va. Code §61-5-3) that: (1) for construction contracts, the vendor is not in default on any monetary obligation owed to the state or a political subdivision of the state, and (2) for all other contracts, that neither vendor nor any related party owe a debt as defined above and that neither vendor nor any related party are in employer default as defined above, unless the debt or employer default is permitted under the exception above.

**WITNESS THE FOLLOWING SIGNATURE:**

Vendor's Name: Casto Technical Services

Authorized Signature:  Date: 3/29/2022

Digitally signed by April Dunlap  
DN: cn=April Dunlap, o=Inc, email=adunlap@castotech.com, c=US  
Date: 2022.03.29 14:27:55 -0400

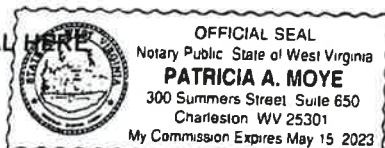
State of WV

County of Kanawha, to-wit:

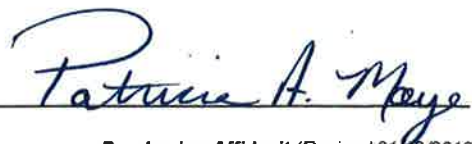
Taken, subscribed, and sworn to before me this 29<sup>th</sup> day of March, 2022

My Commission expires 5/15, 2023

AFFIX SEAL HERE



NOTARY PUBLIC



Purchasing Affidavit (Revised 01/19/2018)

# MARSHALL UNIVERSITY

## GENERAL TERMS AND CONDITIONS

**1. CONTRACTUAL AGREEMENT:** Issuance of an Award Document constitutes acceptance of this contract (the Contract) made by and between Marshall University (University or Marshall) and the Vendor. Vendor's signature to the Contract signifies Vendor's agreement to be bound by and accept the terms and conditions contained in the Contract. Therefore, the parties agree that the following contractual terms and conditions are dominate over any competing terms made a part of the Contract. **IN THE EVENT OF ANY CONFLICT BETWEEN VENDOR'S FORM(S) AND THESE GENERAL TERMS AND CONDITIONS, THESE GENERAL TERMS AND CONDITIONS SHALL CONTROL**

**2. DEFINITIONS:** As used in this Solicitation/Contract, the following terms shall have the meanings attributed to them below. Additional definitions may be found in the specifications, if applicable, included with the Solicitation/Contract.

**2.1 "Award Document"** means the document that identifies the Vendor as the Contract holder when signed by the Vendor and Marshall University's Office of Purchasing and, when necessary, approved as to form by the Attorney General.

**2.2 "Bid" or "Proposal"** means the Vendor's verbal bid or written bid provided in response to a solicitation by the University.

**2.3 "Board"** means the Governing Board of Marshall University.

**2.4 "Buyer"** means an individual designated by a Chief Procurement Officer to perform designated purchasing and acquisition functions as authorized by the Chief Procurement Officer.

**2.5 "Chief Procurement Officer"** means the individual designated by the President of Marshall University to manage, oversee and direct the purchasing and acquisition of supplies, equipment, services, and printing for the University.

**2.6 "Contract"** means the binding agreement that is entered between the University and the Vendor to provide requested goods and/or services requested in the Solicitation.

**2.7 "Governing Board"** means the Marshall University Board of Governors as provided for in the West Virginia state code.

**2.8 "Higher Education Institution"** means an institution as defined by Sections 401(f), (g) and (h) of the federal Higher Education Facilities Act of 1963, as amended.

**2.9 "Office of Purchasing"** means the section within Marshall University headed by the Chief Procurement Officer and its personnel.

December 2, 2019

Marshall University General Terms and Conditions

**2.10 "Purchasing Card" or "P-Card"** means The State of West Virginia's Purchasing Card program, administered under contract by a banking institution, processes payment for goods and services through state designated credit cards.

**2.11 "Responsible Bidder" and "Responsible Vendor"** mean a person and/or vendor who have the capability in all respects to perform contract requirements, and the integrity and reliability which will assure good faith performance.

**2.12 "Responsive Bidder" and "Responsive Vendor"** mean a person and/or a vendor who has submitted a bid which conforms in all material respects to the invitation to bid.

**2.13 "Solicitation"** means the notice of an opportunity to supply the University with goods and services.

**2.14 "State"** means the State of West Virginia and/or any of its agencies, commissions, boards, departments or divisions as context requires.

**2.15 "University"** means Marshall University or Marshall.

**2.16 "Vendor" or "Vendors"** means any entity providing either a verbal or written bid in response to the solicitation, the entity that has been selected as the lowest responsible bidder, or the entity that has been awarded the Contract as context requires.

**2.17 "Will", "Shall" and "Must"** identifies a mandatory item or requirement that concludes the duty, obligation or requirement imposed is mandatory, as opposed to being directory or permissive.

**3. CONTRACT TERM; RENEWAL; EXTENSION:** The term of the Contract shall be determined in accordance with the category that has been identified as applicable to the Contract below:

☒ **Term Contract**

**Initial Contract Term:** The Contract becomes effective on contract award  
\_\_\_\_\_ and extends for a period of one (1) year(s).

**Renewal Term:** The Contract may be renewed upon the mutual written consent of the University and the Vendor. Any request for renewal should be submitted to the University thirty (30) days prior to the expiration date of the initial contract term or appropriate renewal term. A Contract renewal shall be in accordance with the terms and conditions of the original contract. Renewal of the Contract is limited to four (4) successive one (1) year periods or multiple renewal periods of less than one year, provided that the multiple renewal periods do not exceed forty-eight (48) months in total. Automatic renewal of the Contract is prohibited.

December 2, 2019

Marshall University General Terms and Conditions

Any language that seeks to automatically renew, modify, or extend the Contract beyond the initial term or automatically continue the Contract period from term to term is deleted. The Contract may be renewed or continued only upon mutual written agreement of the Parties.

- ☐ **Alternate Renewal Term** – This contract may be renewed for \_\_\_\_\_ successive \_\_\_\_\_ year periods or shorter periods provided that they do not exceed the total number of months contained in all available renewals. Automatic renewal of this Contract is prohibited. Renewals must be approved by the Vendor and Agency.
- ☐ **Fixed Period Contract:** The Contract becomes effective upon Vendor's receipt of the notice to proceed and must be completed within \_\_\_\_\_.
- ☐ **Fixed Period Contract with Renewals:** The Contract becomes effective upon Vendor's receipt of the notice to proceed and part of the Contract must be completed within \_\_\_\_\_ days. Upon completion, the Vendor agrees that maintenance, monitoring, or warranty services will be provided for \_\_\_\_\_ successive one-year periods or multiple periods of less than one year provided that the multiple renewal periods do not exceed \_\_\_\_\_ months in total.
- ☐ **One-Time Purchase:** The term of the Contract shall run from the issuance of the Award Document until all the goods contracted for have been delivered, but in no event, will the Contract extend for more than one fiscal year.
- ☐ **Other:** See attached.

**4. NOTICE TO PROCEED:** Vendor shall begin performance of the Contract immediately upon receiving notice to proceed unless otherwise instructed by the University. Unless otherwise specified, the fully executed Award Document will be considered notice to proceed.

**5. QUANTITIES:** The quantities required under the Contract shall be determined in accordance with the category that has been identified as applicable to the Contract below.

- ☐ **Open End Contract:** Quantities stated in the solicitation are approximations only, based on estimates supplied by the University. It is understood and agreed that the Contract shall cover the quantities ordered for delivery during the term of the Contract, whether more or less than the quantities shown.
- ☐ **Service:** The scope of the service to be provided will be more clearly defined in the specifications included herewith.

December 2, 2019

Marshall University General Terms and Conditions



- ☒ **Combined Service and Goods:** The scope of the service and deliverable goods to be provided will be more clearly defined in the specifications included herewith.
- ☐ **One-Time Purchase:** The Contract is for the purchase of a set quantity of goods that are identified in the specifications included herewith. Once those items have been delivered, no additional goods may be procured under the Contract without an appropriate change order approved by the Vendor, University, and/or when necessary, the Attorney General's office.

**6. EMERGENCY PURCHASES:** The Chief Procurement Officer may suspend the use of a university wide mandatory contract (the University's Office of Purchasing has created standard specifications that are establish University wide contracts for commonly used commodities and services that are needed on a repetitive basis), or the competitive bidding process to allow a Department to purchase goods or services in the open market if for immediate or expedited delivery in an emergency.

Emergencies shall include, but are not limited to, delays in transportation or an unanticipated increase in the volume of work, provided that a required University emergency purchase with another vendor does not cause a breach of contract.

**7. REQUIRED DOCUMENTS:** All the items checked below must be provided to the University by the Vendor as specified below.

- ☒ **BID BOND (Construction Only):** Pursuant to the requirements contained in W. Va. Code § 5-22-1(c), All Vendors submitting a bid on a construction project shall furnish a valid bid bond in the amount of five percent (5%) of the total amount of the bid protecting the State of West Virginia. The bid bond must be submitted with the bid.
- ☒ **PERFORMANCE BOND:** The apparent successful Vendor shall provide a performance bond in the amount of 100% of the contract. The performance bond must be received by the Marshall University Office of Purchasing Office prior to Contract award.
- ☒ **LABOR/MATERIAL PAYMENT BOND:** The apparent successful Vendor shall provide a labor/material payment bond in the amount of 100% of the Contract value. The labor/material payment bond must be received by the Marshall University Office of Purchasing Office prior to Contract award.
- ☐ **MAINTENANCE BOND:** The successful Vendor shall provide a two (2) year maintenance bond covering the roofing system. The maintenance bond must be issued and received by the Marshall University Office of Purchasing Office prior to Contract award.
- ☒ **LICENSE(S) / CERTIFICATIONS / PERMITS:** In addition to anything required under the Section entitled Licensing, of the General Terms and Conditions, the Vendor shall furnish proof of the following licenses, certifications, and/or permits prior to Contract award, in a form acceptable to the University.
- ☐
- ☐

December 2, 2019

Marshall University General Terms and Conditions



☐ **INSERT ADDITIONAL CONDITIONS BELOW:**

☐☐

The apparent successful Vendor shall also furnish proof of any additional licenses or certifications prior to Contract award regardless whether that requirement is listed above.

**8. INSURANCE:** The Vendor shall furnish proof of the insurance identified by a checkmark below prior to Contract award. Subsequent to contract award, and prior to the insurance expiration date, Vendor shall provide the University with proof that the insurance mandated herein has been continued. Vendor must also provide with immediate notice of any changes in its insurance policies mandated herein, including but not limited to, policy cancelation, policy reduction, or change in insurers. The insurance coverages identified below must be maintained throughout the life of the contract. The Vendor shall also furnish proof of any additional insurance requirements prior to the Contract award regardless of whether that insurance requirement is listed in this section.

Any provisions requiring the University to maintain any type of insurance for either of its or the Vendors benefit is deleted.

Vendor must maintain:

☒ **Commercial General Liability Insurance** in at least an amount of: \$1,000,000.00 per occurrence.

☒ **Automobile Liability Insurance** in at least an amount of: \$1,000,000.00 per occurrence.

☐ **Professional/Malpractice/Errors and Omission Insurance** in at least an amount of: \_\_\_\_\_ per occurrence and an aggregate of \_\_\_\_\_.

☐ **Commercial Crime and Third-Party Fidelity Insurance** in an amount of: \_\_\_\_\_ per occurrence and an aggregate of \_\_\_\_\_.

☐ **Cyber Liability Insurance** in an amount of: \_\_\_\_\_ per occurrence and an aggregate of \_\_\_\_\_. Coverage shall be sufficiently broad to respond to the duties and obligations as is undertaken by Vendor in performance of the Contract and shall include, but not limited to, claims involving infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, alteration of electronic information, extortion and network security. The policy shall provide coverage for breach response costs as well as regulatory fines and penalties as well as credit monitoring expenses with limits sufficient to respond to these obligations.

December 2, 2019

Marshall University General Terms and Conditions

☐ **Builders Risk Insurance** in an amount equal to 100% of the amount of the Contract.  
\_\_\_\_\_ per occurrence and an aggregate of \_\_\_\_\_.

**9. WORKERS' COMPENSATION INSURANCE:** The apparent successful Vendor shall comply with laws relating to workers compensation, shall maintain workers' compensation insurance when required, and shall furnish proof of workers' compensation insurance upon request.

**10. LIQUIDATED DAMAGES:** This clause shall in no way be considered exclusive and shall not limit the University's right to pursue any other available remedy. Vendor shall pay liquidated damages in the amount specified below or as described in the specifications:

☐ \_\_\_\_\_ for \_\_\_\_\_

☐ **Liquidated Damages Contained in the Specifications**

**11. ACCEPTANCE:** Vendor's signature on the certification and signature page, constitutes an offer to the University that cannot be unilaterally withdrawn, signifies that the product or service proposed by Vendor meets the mandatory requirements for that product or service, unless otherwise indicated, and signifies acceptance of the terms and conditions unless otherwise indicated.

**12. STATUTE OF LIMITATIONS** - Any clauses limiting the time in which the State may bring suit against the Vendor or any other third party are deleted.

**13. PRICING/BEST PRICE GUARANTEE:** The pricing set forth herein is firm for the life of the Contract, unless specified elsewhere within this Solicitation by the University. A Vendor's inclusion of price adjustment provisions in its bid, without an express authorization in the Solicitation to do so, may result in bid disqualification. Notwithstanding the foregoing, Vendor must extend any publicly advertised sale price to the University and invoice at the lower of the contract price or the publicly advertised sale price.

**14. PAYMENT IN ARREARS:** Payments for goods/services will be made in arrears only upon receipt of a proper invoice, detailing the goods/services provided or receipt of the goods/services, whichever is later. Notwithstanding the foregoing, payments for software licenses, subscriptions, or maintenance may be paid annually in advance.

**15. PAYMENT METHODS:** The Vendor must accept payment by electronic funds transfer or P-Card for payment of all orders under this Contract unless the box below is checked.

☐ Vendor is not required to accept the State of West Virginia's P-Card or by electronic funds transfer as payment for all goods and services for the reason(s) stated below:

☐ \_\_\_\_\_  
☐ \_\_\_\_\_

December 2, 2019

Marshall University General Terms and Conditions

**16. ADDITIONAL FEES:** Vendor is not permitted to charge additional fees or assess additional charges that were not either expressly included in the unit price or lump sum bid amount that Vendor is required by the solicitation to provide. Requesting such fees or charges be paid after the contract has been awarded may result in cancellation of the contract. Any references contained in the Contract, Vendor's bid, or in any American Institute of Architects documents obligating the University to pay to compensate Vendor, in whole or in part, for lost profit, pay a termination fee, pay liquidated damages if the Contract is terminated early, seeking to accelerate payments in the event of Contract termination, default, or non-funding, costs of collection, court costs, or attorney's fees, unless ordered by a court of competent jurisdiction is hereby deleted. Any language imposing and interest or charges due to late payment is deleted.

**17. FEES OR COSTS:** Any language obligating the State to pay costs of collection, court costs, or attorney's fees, unless ordered by a court of competent jurisdiction is deleted.

**18. RISK SHIFTING:** Any provision requiring the State to bear the costs of all or a majority of business/legal risks associated with this Contract, to indemnify the Vendor, or hold the Vendor or a third party harmless for any act or omission is hereby deleted.

**19. LIMITING LIABILITY:** Any language limiting the Vendor's liability for direct damages is deleted.

**20. TAXES:** The Vendor shall pay any applicable sales, use, personal property or other taxes arising out of the Contract and the transactions contemplated hereby. The University is exempt from federal and state taxes and will not pay or reimburse such taxes. The University will, upon request, provide a tax-exempt certificate to confirm its tax-exempt status.

**21. FISCAL YEAR FUNDING:** The Contract shall continue for the term stated herein, contingent upon funds being appropriated by the WV Legislature or otherwise being made available for this Contract. In the event funds are not appropriated or otherwise available, the Contract becomes of no effect and is null and void after June 30 of the current fiscal year. If that occurs, the University may notify the Vendor that an alternative source of funding has been obtained and thereby avoid the automatic termination. Non-appropriation or non-funding shall not be considered an event of default.

**22. CANCELLATION/RIGHT TO TERMINATE:** The University reserves the right to cancel/terminate the Contract immediately upon written notice to the Vendor if the materials or workmanship supplied do not conform to the specifications contained in the Contract. The University may also cancel any purchase or Contract upon thirty (30) days written notice to the Vendor. In the event of early cancellation, the University agrees to pay the Vendor only for all undisputed services rendered or goods received before the termination's effective date. All provisions are delete that seek to require the State to (1) compensate Vendor, in whole or in part, for loss profit, (2) pay a termination fee, or (3) pay liquidated damages if the Contract is terminated early.

In the event that a vendor fails to honor any contractual term or condition, the Chief Procurement Officer may cancel the contract and re-award the contract to the next lowest responsible and responsive bidder in accordance with the Marshall University Board of Governors Policy No. FA-9 Purchasing Policy, section 7.4.1

December 2, 2019

Marshall University General Terms and Conditions

Any language seeking to accelerate payments in the event of Contract termination, default or non-funding is hereby deleted.

**23. RIGHT OF FIRST REFUSAL** Any language seeking to give the Vendor a Right of First Refusal is hereby deleted.

**24. DISPUTES** – Any language binding the University to any arbitration or to the decision of any arbitration board, commission, panel or other entity is deleted; as is any requirement to waive a jury trial.

Any language requiring or permitting disputes under this Contract to be resolved in the courts of any state other than the State of West Virginia is deleted. All legal actions for damages brought by Vendor against the University shall be brought in the West Virginia Legislative Claims Commission. Other causes of action must be brought in the West Virginia Court authorized by statute to exercise jurisdiction over it.

Any language requiring the State to agree to, or be subject to, any form of equitable relief not authorized by the Constitution or laws of State of West Virginia is deleted.

**25. TIME:** Time is of the essence with regard to all matters of time and performance in the Contract.

**26. DELIVERY** -All deliveries under the Contract will be FOB destination unless the State expressly and knowingly agrees otherwise. Any contrary delivery terms are hereby deleted.

**27. APPLICABLE LAW:** The Contract is governed by and interpreted under West Virginia law without giving effect to its choice of law principles. Any information provided in specification manuals, or any other source, verbal or written, which contradicts or violates the West Virginia Constitution, W. Va. Code or Marshall University Board of Governors Policy No. FA-9 Purchasing Policy is void and of no effect. Any language requiring the application of the law of any state other than the State of West Virginia in interpreting or enforcing the Contract is deleted. The Contract shall be governed by the laws of the State of West Virginia

**28. COMPLIANCE WITH GOVERNING LAWS:** Vendor shall comply with all applicable federal, state, and local laws, regulations and ordinances. By submitting a bid, Vendor acknowledges that it has reviewed, understands, and will comply with all applicable laws, regulations, and ordinances. Vendor shall notify all subcontractors providing commodities or services related to this Contract that, as subcontractors, they too are required to comply with all applicable laws, regulations, and ordinances.

**29. ARBITRATION:** Any references made to arbitration contained in the Contract, Vendor's bid, or in any American Institute of Architects documents pertaining to the Contract are hereby deleted, void, and of no effect.

**30. MODIFICATIONS:** Notwithstanding anything contained in the Contract to the contrary, no modification of the Contract shall be binding without mutual written consent of the University, and the Vendor.

**31. AMENDMENTS** - The parties agree that all amendments, modifications, alterations or changes to the Contract shall be by mutual agreement, in writing, and signed by both parties. Any language to the contrary is deleted.

December 2, 2019

Marshall University General Terms and Conditions

**32. NO WAIVER:** The failure of either party to insist upon a strict performance of any of the terms or provision of the Contract, or to exercise any option, right, or remedy herein contained, shall not be construed as a waiver or a relinquishment for the future of such term, provision, option, right, or remedy, but the same shall continue in full force and effect. Any waiver must be expressly stated in writing and signed by the waiving party.

Any provisions requiring the University to waive any rights, claims or defenses is hereby deleted.

**33. SUBSEQUENT FORMS:** The terms and conditions contained in the Contract shall supersede any and all subsequent terms and conditions which may appear on any form documents submitted by Vendor to the University such as price lists, order forms, invoices, sales agreements, or maintenance agreements, and includes internet websites or other electronic documents. Acceptance or use of Vendor's forms does not constitute acceptance of the terms and conditions contained thereon.

**34. ASSIGNMENT:** Neither the Contract nor any monies due, or to become due hereunder, may be assigned by the Vendor without the express written consent of the University and any other government or office that may be required to approve such assignments.

The Vendor agrees not to assign the Contract to any person or entity without the State's prior written consent, which will not be unreasonably delayed or denied. The State reserves the right to assign this Contract to another State agency, board or commission upon thirty (30) days written notice to the Vendor. These restrictions do not apply to the payments made by the State. Any assignment will not become effective and binding upon the State until the State is notified of the assignment, and the State and Vendor execute a change order to the Contract.

**35. WARRANTY:** The Vendor expressly warrants that the goods and/or services covered by the Contract will: (a) conform to the specifications, drawings, samples, or other description furnished or specified by the University; (b) be merchantable and fit for the purpose intended; and (c) be free from defect in material and workmanship.

**36. UNIVERSITY EMPLOYEES:** University employees are not permitted to utilize the Contract for personal use and the Vendor is prohibited from permitting or facilitating the same.

**37. PRIVACY, SECURITY, AND CONFIDENTIALITY:** The Vendor agrees that it will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the University, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the University's policies, procedures, and rules.

**Proposals are NOT to be marked as confidential or proprietary** Any Provisions regarding confidential treatment or non-disclosure of the terms and conditions of the Contract are hereby deleted. State contracts are public records under the West Virginia Freedom of Information Act ("FOIA") (W.Va. Code §29B-1-1, et. seq.) and public procurement laws. This Contract and other public records may be disclosed without notice to the vendor at the University's sole discretion. The University shall not be liable in any way for disclosure of any such records

December 2, 2019

Marshall University General Terms and Conditions

Any provisions regarding confidentiality of or non-disclosure related to contract performance are only effective to the extent they are consistent with FOIA and incorporated into the Contract through a separately approved and signed non-disclosure agreement.

**38. YOUR SUBMISSION IS A PUBLIC DOCUMENT:** Vendor's entire response to the Solicitation and the resulting Contract are public documents. As public documents, they will be disclosed to the public following the bid/proposal opening or award of the contract, as required by the competitive bidding laws of W. Va. Code §18B-5-4 and the Freedom of Information Act in W.Va. Code Chapter 29B.

**DO NOT SUBMIT MATERIAL YOU CONSIDER TO BE CONFIDENTIAL, CONTAINING A TRADE SECRET(S), OR IS OTHERWISE NOT SUBJECT TO PUBLIC DISCLOSURE.**

Submission of any bid, proposal, or other document to the Marshall University Office of Purchasing constitutes your explicit consent to the subsequent public disclosure of the bid, proposal, or document.

**39. LICENSING:** Vendor must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local University of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state University or political subdivision. Upon request, the Vendor must provide all necessary releases to obtain information to enable the University to verify that the Vendor is licensed and in good standing with the above entities.

**40. ANTITRUST:** In submitting a bid to, signing a contract with, or accepting an Award Document from Marshall University, the Vendor agrees to convey, sell, assign, or transfer to the University all rights, title, and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the State of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by Marshall University. Such assignment shall be made and become effective at the time the University tenders the initial payment to Vendor.

**41. THIRD-PARTY SOFTWARE:** If this Contract contemplates or requires the use of third-party software, the vendor represents that none of the mandatory click-through, unsigned, or web-linked terms and conditions presented or required before using such third-party software conflict with any term of this Addendum or that it has the authority to modify such third-party software's terms and conditions to be subordinate to this Addendum. The Vendor shall indemnify and defend the State against all claims resulting from an assertion that such third-party terms and conditions are not in accord with, or subordinate to, this Addendum.

**42. RIGHT TO REPOSSESSION NOTICE:** Any provision for repossession of equipment without notice is hereby deleted. However, the State does recognize a right of repossession with notice.

**43. VENDOR CERTIFICATIONS:** By signing its bid or entering into the Contract, Vendor certifies (1) that its bid or offer was made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership, person or entity submitting a bid or offer for the same material, supplies, equipment or services; (2) that its bid or offer is in all respects fair and without collusion or fraud; (3) that the Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity

December 2, 2019

Marshall University General Terms and Conditions

that could be considered a violation of law; and (4) that it has reviewed the Contract in its entirety; understands the requirements, terms and conditions, and other information contained herein. Vendor's signature on its bid or offer also affirms that neither it nor its representatives have any interest, nor shall acquire any interest, direct or indirect, which would compromise the performance of its services hereunder. Any such interests shall be promptly presented in detail to the University. The individual signing this bid or offer on behalf of Vendor certifies that he or she is authorized by the Vendor to execute this bid or offer or any documents related thereto on Vendor's behalf; that he or she is authorized to bind the Vendor in a contractual relationship; and that, to the best of his or her knowledge, the Vendor has properly registered with the all State agencies as required.

**44. VENDOR RELATIONSHIP:** The relationship of the Vendor to the University shall be that of an independent contractor and no principal-agent relationship or employer-employee relationship is contemplated or created by the Contract. The Vendor as an independent contractor is solely liable for the acts and omissions of its employees and agents. Vendor shall be responsible for selecting, supervising, and compensating any and all individuals employed pursuant to the terms of this Solicitation and resulting contract. Neither the Vendor, nor any employees or subcontractors of the Vendor, shall be deemed to be employees of the University for any purpose whatsoever. Vendor shall be exclusively responsible for payment of employees and contractors for all wages and salaries, taxes, withholding payments, penalties, fees, fringe benefits, professional liability insurance premiums, contributions to insurance and pension, or other deferred compensation plans, including but not limited to, Workers' Compensation and Social Security obligations, licensing fees, etc. and the filing of all necessary documents, forms, and returns pertinent to all of the foregoing. Vendor shall hold harmless the State, and shall provide the State and University with a defense against any and all claims including, but not limited to, the foregoing payments, withholdings, contributions, taxes, Social Security taxes, and employer income tax returns.

**45. INDEMNIFICATION:** The Vendor agrees to indemnify, defend, and hold harmless the State and the University, their officers, and employees from and against: (1) Any claims or losses for services rendered by any subcontractor, person, or firm performing or supplying services, materials, or supplies in connection with the performance of the Contract; (2) Any claims or losses resulting to any person or entity injured or damaged by the Vendor, its officers, employees, or subcontractors by the publication, translation, reproduction, delivery, performance, use, or disposition of any data used under the Contract in a manner not authorized by the Contract, or by Federal or State statutes or regulations; and (3) Any failure of the Vendor, its officers, employees, or subcontractors to observe State and Federal laws including, but not limited to, labor and wage, and hour laws.

**46. PURCHASING AFFIDAVIT:** In accordance with West Virginia Code §18B-5-5 and §5A-3-18 the University is prohibited from awarding a contract to any bidder that owes a debt to the State or a political subdivision of the State, Vendors are required to sign, notarize, and submit the Purchasing Affidavit to the Marshall University Office of Purchasing affirming under oath that it is not in default on any monetary obligation owed to the state or a political subdivision of the state.

**47. WEST VIRGINIA DRUG-FREE WORKPLACE CONFORMANCE AFFIDAVIT** West Virginia Alcohol and Drug-Free Workplace Act requires public improvement contractors to have and implement a drug-free workplace policy that requires drug and alcohol testing. This act is applicable to any construction, reconstruction, improvement, enlargement, painting, decorating or repair of any public improvement let to contract for which the value of contract is over \$100,000. No public authority may award a public improvement contract which is to be let to bid to a contractor unless the terms of the contract require the

December 2, 2019

Marshall University General Terms and Conditions



contractor and its subcontractors to implement and maintain a written drug-free workplace policy and the contractor and its subcontractors provide a sworn statement in writing, under the penalties of perjury, that they maintain a valid drug-free workplace policy.

**48. DISCLOSURE OF INTERESTED PARTIES** A state agency may not enter into a contract, or a series of related contracts, that has/have an actual or estimated value of \$1,000,000 or more until the business entity submits to the contracting state agency a Disclosure of Interested Parties to the applicable contract.

**49. CONFLICT OF INTEREST:** Vendor, its officers, members, or employees shall not presently have or acquire an interest, direct or indirect, which would conflict with or compromise the performance of its obligations hereunder. Vendor shall periodically inquire of its officers, members and employees to ensure that a conflict of interest does not arise. Any conflict of interest discovered shall be promptly presented in detail to the University.

**50. MARSHALL UNIVERSITY'S INFORMATION TECHNOLOGY SERVICES AND SUPPORT DEPARTMENT (IT) FEES:** If a vendor requires services through the Marshall University's IT Department, they must reimburse the University at the IT Rate Schedule which is located at: <https://www.marshall.edu/it/rates/>.

**51. PUBLICITY:** Vendor shall not, in any way or in any form, publicize or advertise the fact that Vendor is supplying goods or services to the University without the express written consent of the Marshall University Communications Department. Requests should be sent to [ucomm@marshall.edu](mailto:ucomm@marshall.edu).

**52. UNIVERSITY MARKS:** Vendor shall not, in any way or in any form use the University's trademarks or other intellectual property without the express written consent of the Marshall University Communications Department. Requests should be sent to [ucomm@marshall.edu](mailto:ucomm@marshall.edu).

**53. INTELLECTUAL PROPERTY:** The University will own all rights, title and interest in any and all intellectual property rights created in the performance or otherwise arising out of the agreement, and Vendor will execute any assignments of other documents necessary for the University to perfect such rights, provided that, for research collaboration pursuant to subcontracts under sponsored research agreements, intellectual property rights will be governed by the terms of the grant or contract to the University to the extent such intellectual property terms to apply to subcontractors.

**54. FERPA:** Vendor agrees to abide by the Family Education Rights and Privacy Act of 1974 ("FERPA"). To the extent that Vendor receives personally identifiable information from education records as defined in (FERPA), Vendor agrees to abide by the limitations on re-disclosure set forth in which states that the officers, employees and agents of a party that receives education record information from Marshall may use the information, but only for the purposes for which the disclosure was made.

December 2, 2019

Marshall University General Terms and Conditions

**55. REPORTS:** Vendor shall provide the University with the following reports identified by a checked box below:

- ☒ Such reports as the University may request. Requested reports may include, but are not limited to, quantities purchased, agencies utilizing the contract, total contract expenditures by University, etc.
- ☐ Quarterly reports detailing the total quantity of purchases in units and dollars, along with a listing of purchases by University.

**56. PREFERENCE FOR THE USE OF DOMESTIC STEEL PRODUCTS IN STATE CONTRACT PROJECTS:** Pursuant to W.Va. Code §5A-3-56, (a)(1) Except when authorized pursuant to the provisions of subsection (b) of this section, no contractor may use or supply steel products for a state contract project other than those steel products made in the United States. A contractor who uses steel products in violation of this section may be subject to civil penalties pursuant to W.Va. Code §5A-3-56. As used in this section (2):

(A) "State contract project" means any erection or construction of, or any addition to, alteration of or other improvement to any building or structure, including, but not limited to, roads or highways, or the installation of any heating or cooling or ventilating plants or other equipment, or the supply of any materials for such projects, pursuant to a contract with the State of West Virginia for which bids were solicited on or after the effective date of this section on or after June 6, 2001.

(B) "Steel products" means products rolled, formed, shaped, drawn, extruded, forged, cast, fabricated or otherwise similarly processed, or processed by a combination of two or more of such operations, from steel made by the open hearth, basic oxygen, electric furnace, bessemer or other steel making process.

(b) Notwithstanding any provision of subsection (a) of this section to the contrary, the Director of the West Virginia Department of Administration, Purchasing Division ("Director of the Purchasing Division") may, in writing, authorize the use of foreign steel products if:

(1) The cost for each contract item used does not exceed one tenth of one percent of the total contract cost or \$2,500, whichever is greater. For the purposes of this section, the cost is the value of the steel product as delivered to the project; or

(2) The Director of the Purchasing Division determines that specified steel materials are not produced in the United States in sufficient quantity or otherwise are not reasonably available to meet contract requirements.

**57. PREFERENCE FOR DOMESTIC ALUMINUM, GLASS AND STEEL PRODUCTS:**

In Accordance with W. Va. Code § 5-19-1 et seq.,

(a) Every state spending unit, as defined in chapter five-a, shall require that every contract or subcontract for the construction, reconstruction, alteration, repair, improvement or maintenance of public works or for the purchase of any item of machinery or equipment to be used at sites of public works contain a provision that, if any aluminum, glass or steel products are to be supplied in the performance of the contract, or subcontract, only domestic aluminum, glass or steel products shall be supplied unless the spending officer, as defined in chapter five-a, determines, in writing, after the receipt of offers or bids, that the cost of domestic aluminum, glass or steel products is unreasonable or inconsistent with the public interest or that domestic aluminum, glass or steel products are not produced in sufficient quantities to meet the contract requirements: Provided,

December 2, 2019

Marshall University General Terms and Conditions

That this article applies to any public works contract awarded in an amount more than \$50,000, and with regard to steel only, this article applies to any public works contract awarded in an amount more than \$50,000 or requiring more than ten thousand pounds of steel products.

The cost of domestic aluminum, glass, or steel products may be unreasonable if the cost is more than twenty percent (20%) of the bid or offered price for foreign made aluminum, glass, or steel products. If the domestic aluminum, glass or steel products to be supplied or produced in a "substantial labor surplus area", as defined by the United States Department of Labor, the cost of domestic aluminum, glass, or steel products may be unreasonable if the cost is more than thirty percent (30%) of the bid or offered price for foreign made aluminum, glass, or steel products.

This preference shall be applied to an item of machinery or equipment, as indicated above, when the item is a single unit of equipment or machinery manufactured primarily of aluminum, glass or steel, is part of a public works contract and has the sole purpose or of being a permanent part of a single public works project. This provision does not apply to equipment or machinery purchased by a spending unit for use by that spending unit and not as part of a single public works project.

All bids and offers including domestic aluminum, glass or steel products that exceed bid or offer prices including foreign aluminum, glass or steel products after application of the preferences provided in this provision may be reduced to a price equal to or lower than the lowest bid or offer price for foreign aluminum, glass or steel products plus the applicable preference. If the reduced bid or offer prices are made in writing and supersede the prior bid or offer prices, all bids or offers, including the reduced bid or offer prices, will be reevaluated in accordance with this rule.

December 2, 2019

Marshall University General Terms and Conditions

## **ADDITIONAL TERMS AND CONDITIONS (Construction Contracts Only)**

**1. CONTRACTOR'S LICENSE:** W. Va. Code § 21-11-2 requires that all persons desiring to perform contracting work in the State of West Virginia be licensed. The West Virginia Contractors Licensing Board is empowered to issue the contractor's license. Applications for a contractor's license may be made by contacting the West Virginia Division of Labor. W. Va. Code § 21-11-11 requires any prospective Vendor to include the contractor's license number on its bid. If an apparent low bidder fails to submit a license number in accordance with this section, the Marshall University Office of Purchasing will promptly request by telephone and electronic mail that the low bidder and the second low bidder provide the license number within one business day of the request. Failure of the bidder to provide the license number within one business day of receiving the request shall result in disqualification of the bid. Vendors should include a contractor's license number in the space provided below.

Contractor's Name: Casto Technical Services

Contractor's License No.: WV-001241

The apparent successful Vendor must furnish a copy of its contractor's license prior to the issuance of a contract award document.

**2. DRUG-FREE WORKPLACE AFFIDAVIT:** W. Va. Code § 21-1D-5 provides that any solicitation for a public improvement contract requires each Vendor that submits a bid for the work to submit an affidavit that the Vendor has a written plan for a drug-free workplace policy. If the affidavit is not submitted with the bid submission, the Marshall University Office of Purchasing shall promptly request by telephone and electronic mail that the low bidder and second low bidder provide the affidavit within one business day of the request. Failure to submit the affidavit within one business day of receiving the request shall result in disqualification of the bid. To comply with this law, Vendor should complete the enclosed drug-free workplace affidavit and submit the same with its bid. Failure to submit the signed and notarized drugfree workplace affidavit or a similar affidavit that fully complies with the requirements of the applicable code, within one business day of being requested to do so shall result in disqualification of Vendor's bid. Pursuant to W. Va. Code § 21-1D-2(b) and (k), this provision does not apply to public improvement contracts the value of which is \$100,000 or less or temporary or emergency repairs.

**2.1. DRUG-FREE WORKPLACE POLICY:** Pursuant to W. Va. Code § 21-1D-4, Vendor and its subcontractors must implement and maintain a written drug-free workplace policy that complies with said article. The awarding public authority shall cancel this contract if: (1) Vendor fails to implement and maintain a written drug-free workplace policy described in the preceding paragraph, (2) Vendor fails to provide information regarding implementation of its drug-free workplace policy at the request of the public authority; or (3) Vendor provides to the public authority false information regarding the contractor's drug-free workplace policy.

Pursuant to W. Va. Code §21-1D-2(b) and (k), this provision does not apply to public improvement contracts the value of which is \$100,000 or less or temporary or emergency repairs.

December 2, 2019

Marshall University General Terms and Conditions

**3. DRUG FREE WORKPLACE REPORT:** Pursuant to W. Va. Code § 21-1D-7b, no less than once per year, or upon completion of the project, every contractor shall provide a certified report to the public authority which let the contract. For contracts over \$25,000, the public authority shall be the Marshall University Office of Purchasing. For contracts of \$25,000 or less, the public authority shall be the Department issuing the contract. The report shall include:

- (1) Information to show that the education and training service to the requirements of W. Va. Code § 21-1D-5 was provided;
- (2) The name of the laboratory certified by the United States Department of Health and Human Services or its successor that performs the drug tests;
- (3) The average number of employees in connection with the construction on the public improvement;
- (4) Drug test results for the following categories including the number of positive tests and the number of negative tests: (A) Pre-employment and new hires; (B) Reasonable suspicion; (C) Post-accident; and (D) Random.

Vendor should utilize the attached Certified Drug Free Workplace Report Coversheet when submitting the report required hereunder. Pursuant to W. Va. Code §21-1D-2(b) and (k), this provision does not apply to public improvement contracts the value of which is \$100,000 or less or temporary or emergency repairs.

**4. AIA DOCUMENTS:** All construction contracts that will be completed in conjunction with architectural services procured under Chapter 5G of the West Virginia Code will be governed by the attached AIA documents, as amended by the Supplementary Conditions for the State of West Virginia, in addition to the terms and conditions contained herein.

**4A. PROHIBITION AGAINST GENERAL CONDITIONS:** Notwithstanding anything contained in the AIA Documents or the Supplementary Conditions, the State of West Virginia will not pay for general conditions, or winter conditions, or any other condition representing a delay in the contracts. The Vendor is expected to mitigate delay costs to the greatest extent possible and any costs associated with delays must be specifically and concretely identified. The state will not consider an average daily rate multiplied by the number of days extended to be an acceptable charge.

**5. GREEN BUILDINGS MINIMUM ENERGY STANDARDS:** In accordance with W. Va. Code § 22- 29-4, all new building construction projects of public agencies shall be designed and constructed complying with the ICC International Energy Conservation Code, adopted by the State Fire Commission, and the ANSI/ASHRAE/IESNA Standard 90.1-2007: Provided, That if any construction project has a commitment of federal funds to pay for a portion of such project, this provision shall only apply to the extent such standards are consistent with the federal standards.

December 2, 2019

Marshall University General Terms and Conditions

**6. LOCAL LABOR MARKET HIRING REQUIREMENT:** Pursuant to W.Va. Code §21-1C-1 et seq., Employers shall hire at least seventy-five percent of employees for public improvement construction projects from the local labor market, to be rounded off, with at least two employees from outside the local labor market permissible for each employer per project.

Any employer unable to employ the minimum number of employees from the local labor market shall inform the nearest office of Workforce West Virginia of the number of qualified employees needed and provide a job description of the positions to be filled.

If, within three business days following the placing of a job order, Workforce West Virginia is unable to refer any qualified job applicants to the employer or refers less qualified job applicants than the number requested, then Workforce West Virginia shall issue a waiver to the employer stating the unavailability of applicant and shall permit the employer to fill any positions covered by the waiver from outside the local labor market. The waiver shall be in writing and shall be issued within the prescribed three days. A waiver certificate shall be sent to both the employer for its permanent project records and to the public authority.

Any employer who violates this requirement is subject to a civil penalty of \$250 per each employee less than the required threshold of seventy-five percent per day of violation after receipt of a notice of violation.

Any employer that continues to violate any provision of this article more than fourteen calendar days after receipt of a notice of violation is subject to a civil penalty of \$500 per each employee less than the required threshold of seventy-five percent per day of violation.

The following terms used in this section have the meaning shown below.

(1) The term "construction project" means any construction, reconstruction, improvement, enlargement, painting, decorating or repair of any public improvement let to contract in an amount equal to or greater than \$500,000. The term "construction project" does not include temporary or emergency repairs;

(2) The term "employee" means any person hired or permitted to perform hourly work for wages by a person, firm or corporation in the construction industry; The term "employee" does not include: (i) Bona fide employees of a public authority or individuals engaged in making temporary or emergency repairs; (ii) Bona fide independent contractors; or (iii) Salaried supervisory personnel necessary to assure efficient execution of the employee's work;

(3) The term "employer" means any person, firm or corporation employing one or more employees on any public improvement and includes all contractors and subcontractors;

(4) The term "local labor market" means every county in West Virginia and any county outside of West Virginia if any portion of that county is within fifty miles of the border of West Virginia;

December 2, 2019

Marshall University General Terms and Conditions

(5) The term "public improvement" includes the construction of all buildings, roads, highways, bridges, streets, alleys, sewers, ditches, sewage disposal plants, waterworks, airports and all other structures that may be let to contract by a public authority, excluding improvements funded, in whole or in part, by federal funds.

**7. DAVIS-BACON AND RELATED ACT WAGE RATES:**

☐ The work performed under this contract is federally funded in whole, or in part. Pursuant to \_\_\_\_\_, Vendors are required to pay applicable Davis-Bacon wage rates.

☒ The work performed under this contract is not subject to Davis-Bacon wage rates.

**8. SUBCONTRACTOR LIST SUBMISSION:** In accordance with W. Va. Code § 5-22-1, the apparent low bidder on a contract valued at more than \$250,000.00 for the construction, alteration, decoration, painting or improvement of a new or existing building or structure shall submit a list of all subcontractors who will perform more than \$25,000.00 of work on the project including labor and materials. (This section does not apply to any other construction projects, such as highway, mine reclamation, water or sewer projects.) The subcontractor list shall be provided to the Marshall University Office of Purchasing within one business day of the opening of bids for review. If the apparent low bidder fails to submit the subcontractor list, the Marshall University Office of Purchasing shall promptly request by telephone and electronic mail that the low bidder and second low bidder provide the subcontractor list within one business day of the request. Failure to submit the subcontractor list within one business day of receiving the request shall result in disqualification of the bid.

If no subcontractors who will perform more than \$25,000.00 of work are to be used to complete the project, the apparent low bidder must make this clear on the subcontractor list, in the bid itself, or in response to the Marshall University Office of Purchasing's request for the subcontractor list.

a. Required Information. The subcontractor list must contain the following information:

i. Bidder's name

ii. Name of each subcontractor performing more than \$25,000 of work on the project.

iii. The license number of each subcontractor, as required by W. Va. Code § 21-11-1 et. seq.

iv. If applicable, a notation that no subcontractor will be used to perform more than \$25,000.00 of work. (This item iv. is not required if the vendor makes this clear in the bid itself or in documentation following the request for the subcontractor list.)

December 2, 2019

Marshall University General Terms and Conditions



b. Subcontractor List Submission Form: The subcontractor list may be submitted in any form, including the attached form, as long as the required information noted above is included. If any information is missing from the bidder's subcontractor list submission, it may be obtained from other documents such as bids, emails, letters, etc. that accompany the subcontractor list submission.

c. Substitution of Subcontractor. Written approval must be obtained from the State Spending Unit before any subcontractor substitution is permitted. Substitutions are not permitted unless:

- i. The subcontractor listed in the original bid has filed for bankruptcy;
- ii. The subcontractor in the original bid has been debarred or suspended; or
- iii. The contractor certifies in writing that the subcontractor listed in the original bid fails, is unable, or refuses to perform his subcontract.

December 2, 2019

Marshall University General Terms and Conditions

**Subcontractor List Submission (Construction Contracts Only)**

**Bidder's Name:** Casto Technical Services

☒ Check this box if no subcontractors will perform more than \$25,000.00 of work to complete the project.


Subcontractor Name	License Number if Required by W. Va. Code § 21-11-1 et.seq.

Attach additional pages if necessary

December 2, 2019

Marshall University General Terms and Conditions

**DESIGNATED CONTACT: Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to the Contract.**

 Digitally signed by April Dunlap  
DN: cn=April Dunlap, o=du, email=adunlap@castotech.com, c=US  
Date: 2021.04.16 15:29:47 -0400 Sales Support  
(Name, Title)  
April Dunlap, Sales Support  
(Printed Name and Title)  
540 Leon Sullivan Way Charleston, WV 25301  
(Address)  
304-346-0549 304-346-8920  
(Phone Number) (Fax Number)  
adunlap@castotech.com  
(Email Address)

**CERTIFICATION AND SIGNATURE:** By signing below, or submitting documentation through BONFIRE, I certify that I have reviewed this Solicitation in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to Marshall University that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that I am authorized by the Vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on Vendor's behalf; that I am authorized to bind the Vendor in a contractual relationship; and that to the best of my knowledge, the Vendor will properly register with the WV Purchasing Division and Marshall University.

Casto Technical Services  
(Company)

 Digitally signed by April Dunlap  
DN: cn=April Dunlap, o=du, email=adunlap@castotech.com, c=US  
Date: 2021.04.16 15:30:30 -0400  
(Authorized Signature)

April Dunlap, Sales Support  
(Printed Name and Title of Authorized Representative)

4/16/2021  
(Date)

304-346-0549 304-346-8920  
(Phone Number) (Fax Number)

December 2, 2019

Marshall University General Terms and Conditions

REQUEST FOR BIDS  
MU21HHCHILLER  
Marshall University Housing and Residence Life – Harless Hall  
**Comprehensive Chiller Maintenance and Repair Services**

---

**SPECIFICATIONS**

1. **PURPOSE AND SCOPE:** The Marshall University Office of Purchasing is soliciting bids on behalf of Housing and Residence Life to establish a contract for Chiller Maintenance and Repair Services for Harless Hall. This is a Comprehensive Annual /Semi-Annual/Monthly service that includes predictive maintenance, preventive maintenance and systematic inspection that provides in part - adjustments, cleaning, lubrication, repairs, and parts replacements of all equipment listed in this document are the primary requirements of this contract.

The successful vendor will provide full-service maintenance and repair of three (3) chillers located in Harless Hall on the main campus of Marshall University in Huntington, West Virginia.

2. **DEFINITIONS:** The terms listed below shall have the meanings assigned to them below. Additional definitions can be found in section 2 of the General Terms and Conditions.

- 2.1 **“Chiller Maintenance”** means Preventive Maintenance and Corrective Maintenance services provided by Vendor under this Contract and shall not include the addition of new Chiller equipment to increase the size or coverage area of the existing Chiller system.
- 2.2 **“Corrective Maintenance”** includes all work not identified as Preventive Maintenance on Exhibit A. Corrective Maintenance is intended to cover work performed on an as-needed basis to identify and correct a malfunction or failure in a Chiller system and testing to ensure that equipment is in proper working order after the repair.
- 2.3 **“Inspection”** means pre-scheduled internal and external preventive maintenance work in accordance with (but not limited to) the equipment manufacturer's recommendation.
- 2.4 **“OEM”** means Original Equipment Manufacturer. An original equipment manufacturer (OEM) makes equipment or components that are then marketed by its client, another manufacturer, or a reseller, usually under that reseller's own name.
- 2.5 **“Predictive Maintenance”** is a technique that uses data analysis tools and techniques to detect anomalies in operations and possible defects in equipment so that they can be repaired before resulting in failure.
- 2.6 **“Preventive Maintenance”** means activities that have been specifically identified on Exhibit A. Preventive maintenance is intended to include regularly scheduled activities that are known and anticipated in advance rather than one-time repairs.
- 2.7 **“Pricing Pages”** means the schedule of prices, estimated quantity, and totals attached hereto as Exhibit D.

July 7, 2020

REQUEST FOR BIDS  
MU21HHCHILLER  
Marshall University Housing and Residence Life – Harless Hall  
**Comprehensive Chiller Maintenance and Repair Services**

---

**“RFB”** means the official RFB published by the Office of Purchasing and identified as **MU21HHCHILLER**.

**2.8 “Routine Overhaul and Repairs”** means prescheduled services on the equipment to ensure machines are kept operational. This includes all replacement parts and materials as necessitated by wear or manufacturers' recommendations.

**3. PERFORMANCE REQUIREMENTS:** Vendor shall provide Department with Chiller Maintenance on a continuing basis as outlined in this Contract.

**3.1 Chiller Maintenance (Preventive and Corrective):**

**3.1.1** Vendor shall provide Chiller Maintenance in accordance with manufacturer's recommendations and specifications, as well as industry best practices, at all facilities listed on Exhibit C attached hereto and incorporated herein by reference.

**3.1.2** Vendor shall keep abreast of all equipment changes and product improvements and will continually explore new and better methods of higher technology that will enhance the Department's preventive maintenance service agreement capabilities and enhancements to Department operations. It shall be the vendor's duty to notify the Department of these changes, improvements, and methods as they occur, so that the Department may enhance their operations and maintenance program.

**3.1.3** Vendor shall furnish and install parts necessary to keep the chiller system at Harless Hall listed on Exhibit B in proper working order. Including but not limited to compressors, coils, fans, refrigerant leaks, solenoids, thermal expansion valves, head pressure controls, control boards, programming, electrical components, strainers, sensors, and any other component needed to insure proper operation. Vendor will also be responsible for testing refrigerant for acid content and to clean and neutralize acid in refrigeration systems and replace any refrigerant that is tested positive for acid or any refrigerant lost due to leaks or component change out.

**3.1.4** Vendor shall furnish all equipment including cranes, tools, and parts necessary for the performance of the chiller maintenance. Equipment and tools will be provided at no cost to the department.

**3.1.5** Vendor shall provide expendable materials used in the scope of performing under this Contract at no cost to the Department. Such items may include, but are not limited to, grease, cleaning supplies, rags, etc.

July 7, 2020

**REQUEST FOR BIDS**  
**MU21HHCHILLER**  
**Marshall University Housing and Residence Life – Harless Hall**  
**Comprehensive Chiller Maintenance and Repair Services**

---

- 3.1.6** Vendor shall be responsible for supply, reclamation, disposal, and handling of all refrigerants and oils according to EPA, Federal, and State regulations. All refrigerants and oils will be supplied at contractors' expense.
- 3.1.7** Vendor shall be responsible for replacement of ceiling grid and tiles should they become soiled or damaged by Vendor at no cost to the Department. Department will make final determination whether to clean or replace tiles on a case-by-case basis.
- 3.1.8** Vendor may only remove equipment from service for a period of twenty-four (24) hours or more with written permission from the Department. Any request to remove equipment for twenty-four (24) hours or more must include a description of the work required and an estimate of the time the equipment will be out of service.
- 3.1.9** Vendor shall maintain a continuous twenty-four (24) hour emergency telephone service where they can be reached every day of the week, including Sundays and Holidays.
- 3.1.10** Vendor shall not perform any Chiller Maintenance under this contract without prior approval from the Department.
- 3.1.11** Vendor, upon request, will provide free of charge formal/informal training to Department so that its personnel understand the operation and diagnostic procedures necessary to keep the equipment operating in the most efficient manner.
- 3.1.12** Vendor shall schedule routine overhauls and yearly repairs so that the equipment is ready for operation year-round. Harless chiller system is operated on outside temperatures when the outside temperature is above 55 degrees the chillers will receive a call to run and must be ready in case there is warm periods through the winter months.
- 3.1.13** Vendor shall furnish a warranty of twelve (12) months for all labor performed under this contract.

**3.2 Preventive Maintenance:**

- 3.2.1** Vendor shall perform Preventive Maintenance monthly in accordance with a schedule mutually agreed upon by the Vendor and the Department.
- 3.2.2** Vendor will be compensated for Preventive Maintenance activities through a monthly fee. Vendor must provide parts necessary to perform Preventive

July 7, 2020

REQUEST FOR BIDS  
MU21HHCHILLER  
Marshall University Housing and Residence Life – Harless Hall  
**Comprehensive Chiller Maintenance and Repair Services**

---

Maintenance at no additional cost to Department. Any cost for such parts must be included in the monthly Preventive Maintenance fee.

- 3.2.3** Vendor shall submit a proposed schedule of all Preventive Maintenance within five (5) days of Vendor being awarded this contract for approval by Department, at Department's discretion.

**3.3 Corrective Maintenance:**

Vendor shall perform Corrective Maintenance as needed to restore the Chiller Systems to working order.

- 3.3.1** Any machine that is non-operational is considered to need major repairs. This would include compressors, fans, valves, strainers, solenoids, refrigerant leaks, electrical components, and control boards, and other internal parts. These are to be completed as soon as possible with no extra cost to the Department regardless of time.

- 3.3.2** Department may request Corrective Maintenance on an emergency basis by notifying the Vendor of the emergency.

**3.3.2.1** Vendor must respond to emergency calls within two (2) hours.

**3.3.2.2** Vendor's emergency response for service must be answered within a thirty (30) minute timeframe of the initial call.

**3.3.2.3** Service response time must be within the two (2) hours of the initial answered call-back.

**3.3.2.4** Maximum response time for an emergency/unscheduled service call will be four (4) hours. Non-emergency call response time shall be less than twenty-four (24) hours.

**3.3.3 Parts:**

**3.3.3.1** Vendor is responsible for procuring all necessary parts needed to perform Chiller Maintenance under this Contract within the required time frames established herein.

**3.3.3.2** Vendor must provide OEM replacement parts. Any parts not OEM must be approved by the Department before installation.

**3.3.3.3** Vendor shall maintain a supply or inventory of routinely used replacement parts for the Chiller equipment utilized by the Department.

July 7, 2020



REQUEST FOR BIDS  
MU21HHCHILLER  
Marshall University Housing and Residence Life – Harless Hall  
**Comprehensive Chiller Maintenance and Repair Services**

---

All replacement parts shall be equal to or better than original manufacturer's parts. All parts used for replacement for normal wear or failed parts shall be new and obtained from authorized parts suppliers of the appropriate equipment manufacturer.

**3.3.3.4 Parts Warranty:** The Vendor shall provide a copy of the manufacturer's warranty on parts with the invoice.

- 4. FACILITIES ACCESS:** The facilities identified in this contract may require access cards and/or keys to gain entrance.
- 4.1** Vendor must identify principal service personnel which will be issued access cards and/or keys to perform service.
  - 4.2** Vendor will be responsible for controlling cards and keys and will pay replacement fee if the cards or keys become lost or stolen.
  - 4.3** Vendor shall notify Department immediately of any lost, stolen, or missing card or key.
  - 4.4** Anyone performing under this Contract will be subject to Department's security protocol and procedures.
  - 4.5** Vendor shall inform all staff of Department's security protocol and procedures.

**5. QUALIFICATIONS:**

- 5.1 Experience:** Vendor, or Vendor's employees that will be performing under this contract, must have successfully maintained Chiller equipment of the type, character and magnitude currently being utilized by Department and included on the list of Chiller equipment, attached hereto as Exhibit C, on two or more occasions in the last five (5) years. Vendor should provide information confirming its experience prior to contract award.
- 5.2 Training:** Vendor, or Vendor's employees that will be performing under this contract, shall be trained, and/or certified to provide Chiller Maintenance on the equipment located at the Department's facilities as shown on Exhibit C. Vendor must provide Department with documentation satisfactory to verify training and certification upon request.

July 7, 2020

REQUEST FOR BIDS  
MU21HHCHILLER  
Marshall University Housing and Residence Life – Harless Hall  
**Comprehensive Chiller Maintenance and Repair Services**

---

**5.3 Factory Authorization:** Vendor must be authorized by the applicable manufacturer to perform repair and warranty work on the equipment listed on Exhibit C.

**5.4 Certifications:** Vendor shall ensure that all Chiller Maintenance performed under this Contract is performed by an appropriately licensed individual. Required licenses may include, but are not limited to the following:

**5.4.1** Electricians – WV Electricians License

**5.4.2** Plumbers – WV Plumbers License

**5.4.3** WV Contractor's License

**5.5 Building Codes:** At a minimum, the CHILLER Maintenance shall comply with the current editions of the following standards and codes in effect at the time of performance.

**5.5.1** National Electric Code (NEC)

**5.5.2** International Building Code (IBC)

**5.5.3** International Mechanical Code (IMC)

**5.5.4** Underwriters Laboratories: Products shall be UL-916-PAZX listed.

**5.5.5** ANSI/ASHRAE Standard 135-2004 (BACnet)

**5.5.6** ANSI/EIA/CEA-709.1 (LonTalk)

**5.5.7** NFPA (National Fire Protection Association)

**6. REPORTS:** Vendor shall provide all the reports as outlined below.

**6.1 Preventive Maintenance Log:** Vendor shall provide and update a Preventive Maintenance log in the form of a chart posted in the vicinity of chiller equipment. The Preventive Maintenance log must include a listing of all Preventive Maintenance performed, the name of the individual performing the Preventive Maintenance, the date it was performed, and the time spent performing the Preventive Maintenance. Vendor shall also maintain a duplicate maintenance log that Vendor must submit to Department monthly.

**6.2 Wiring Diagram:** Vendor shall maintain updated wiring diagrams for the Chiller equipment. Vendor must permanently mount wiring diagrams on full-size display panels near the equipment controllers. These wiring diagrams are to remain the property of the Department and will be surrendered upon termination of this contract.

July 7, 2020

REQUEST FOR BIDS  
MU21HHCHILLER  
Marshall University Housing and Residence Life – Harless Hall  
**Comprehensive Chiller Maintenance and Repair Services**

---

- 6.3 Corrective Maintenance Log:** Vendor shall maintain a log of all Corrective Maintenance performed under this Contract. The log must include the name of the individual performing the Corrective Maintenance, a description of the work performed, a list of any parts that were repaired or replaced, the total time spent performing the Corrective Maintenance, and the date and time Corrective Maintenance was performed. Vendor shall submit a copy of this log to Department upon Department's request.
- 6.4 Quarterly and Annual Reports:** Vendor shall provide quarterly reports and annual summaries to the Department, and to the Office of Purchasing when requested, with a detailed listing of Chiller Maintenance performed under this Contract during that period. The quarterly and annual reports must include a listing of the hours worked per project, the cost of hours worked per project, the total of all hours worked and corresponding cost, a listing of parts utilized per project, the cost of parts utilized per project, the total parts used for the period, the cost of parts for the period, a grand total of all costs for the period, and any other information that the Department or Office of Purchasing may request.
- 7. TRAVEL:** Vendor shall be responsible for all mileage and travel costs, including travel time, associated with performance of this Contract. Such costs will not be paid by the Department.
- 8. CONTRACT AWARD:** This Contract will be awarded to the Vendor meeting the required specifications that provides the lowest Total Cost on the Pricing Pages.
- 8.1 Pricing Pages:** Vendor should complete the Pricing Pages by inserting the requested information in the appropriate location and performing the calculations necessary to arrive at a total cost. The requested information includes: an Annual/Semi-Annual/Monthly cost, and the total cost. Vendor should complete the Pricing Pages in their entirety as failure to do so may result in Vendor's bid being disqualified.

REQUEST FOR BIDS  
MU21HHCHILLER  
Marshall University Housing and Residence Life – Harless Hall  
**Comprehensive Chiller Maintenance and Repair Services**

---

**9. ORDERING:**

- 9.1 Preventive Maintenance Ordering:** After award of this Contract, Department and Vendor shall agree upon a Preventive Maintenance schedule.
- 9.2 Corrective Maintenance Ordering:** The Department shall define the scope of each Corrective Maintenance project to be performed under this Contract.

**10. BILLING / PAYMENT:**

- 10.1 Preventive Maintenance and Corrective Maintenance:** All labor and parts associated with the Preventative and Corrective Maintenance activities must be included in the monthly charge. Vendor may submit monthly invoices to obtain payment for Preventive and Corrective Maintenance.

**11. DEFAULT:**

- 11.1** The following shall be considered a default under this Contract.
- 11.1.1** Failure to perform Chiller Maintenance in accordance with the requirements contained in herein.
  - 11.1.2** Failure to comply with other specifications and requirements contained herein.
  - 11.1.3** Failure to comply with any applicable law, rule, ordinance, or building code applicable to this Contract or Chiller Maintenance generally.
  - 11.1.4** Failure to remedy deficient performance upon request.
- 11.2** The following remedies shall be available upon default.
- 11.2.1** Cancellation of the Contract.
  - 11.2.2** Cancellation of one or more release orders issued under this Contract.
  - 11.2.3** Any other remedies available in law or equity.

July 7, 2020

REQUEST FOR BIDS  
MU21HHCHILLER  
Marshall University Housing and Residence Life – Harless Hall  
**Comprehensive Chiller Maintenance and Repair Services**

---

- 11.3** Department reserves the right to inspect the Chiller Maintenance to ensure that Vendor's performance is in compliance with this Contract. If Department determines that Vendor has failed to perform in accordance with this Contract, Department may demand that the Vendor immediately remedy the failure or consider the failure to be a default. Vendor's failure to remedy the deficient performance, if given the opportunity to do so, shall be considered a default.

July 7, 2020

REQUEST FOR BIDS  
MU21HHCHILLER  
Marshall University Housing and Residence Life – Harless Hall  
**Comprehensive Chiller Maintenance and Repair Services**

---

**EXHIBIT A – MAINTENANCE REQUIREMENTS**

**Maintenance Activities Include:**

1. Starter;
2. Electric wiring from the starter to motor;
3. Insulation of the refrigerant piping and equipment;
4. All pressure and temperature controls, thermometers, gauges, dampers, control devices and thermostats located at the equipment;
5. Vendor will furnish the owner with the written results or all test and analysis. Failure to furnish results may lead to termination of the contract; and
6. Vendor is responsible for the proper disposal or reclamation of all oils and or refrigerants per EPA regulations.

July 7, 2020

REQUEST FOR BIDS  
MU21HHCHILLER  
Marshall University Housing and Residence Life – Harless Hall  
Comprehensive Chiller Maintenance and Repair Services

---

**EXHIBIT B – SERVICE SCHEDULE AND INSPECTION REQUIREMENTS**

**Monthly Service and Inspections:**

1. Inspect at least once a month operation of cooling equipment including semi-annual maintenance
2. Visual inspection of machines for corrosion, damaged insulation & leaks
3. Oil level and temperature and pressure
4. Refrigerant level
5. Operating hours (where metered)
6. Condenser pressure
7. Chilled water temperature controls
8. Chilled water supply temp
9. Chilled water return Temp

**Semi-Annual Service and Inspections:**

1. Harless Hall chiller system needs to be maintained year-round in case there are warm periods through the winter months when outside temps reach 55 Degrees or higher.
2. Chilled water low temperature cutout and recycle switch
3. Refrigerant low temperature cutout switch
4. Condenser high pressure cutout switch
5. Low oil pressure cutout switch
6. Oil filter cutout switch were applicable



REQUEST FOR BIDS  
MU21HHCHILLER  
Marshall University Housing and Residence Life – Harless Hall  
Comprehensive Chiller Maintenance and Repair Services

---

**EXHIBIT B – SERVICE SCHEDULE AND INSPECTION REQUIREMENTS**

**Annual Overhaul and Repairs:**

1. *Harless Hall chiller system needs to be maintained year-round in case there are warm periods through the winter months when outside temps reach 55 Degrees or higher.*
2. Replace oil
3. Oil sample analysis (acid-metal erosion-insulation)
4. Vibration analysis
5. Infra-red scan of starters and motor connection
6. Megger motor
7. Change oil filter
8. Change refrigerant filters if applicable.
9. *Clean all condenser coils as need but not less than once a year with a foaming coil cleaner that is not harmful to the rubber roof membrane on Harless Hall.*

**REQUEST FOR BIDS**  
**MU21HHCHILLER**  
**Marshall University Housing and Residence Life – Harless Hall**  
**Comprehensive Chiller Maintenance and Repair Services**

---

**EXHIBIT C – CHILLER LOCATIONS/INFORMATION**

<b>NO.</b>	<b>LOCATION</b>	<b>UNIT MANUFACTURER</b>	<b>MODEL NO.</b>	<b>SERIAL NO.</b>
1a	Harless Hall	DIAKIN APPLIED	AWS290CDPEWNN-ER10	STNU160100015
1b	Harless Hall	DIAKIN APPLIED	AWS290CDPEWNN-ER10	STNU160100057
1c	Harless Hall	DIAKIN APPLIED	AWS290CDPEWNN-ER10	STNU16100048

July 7, 2020

REQUEST FOR BIDS  
MU21HHCHILLER  
Marshall University Housing and Residence Life – Harless Hall  
Comprehensive Chiller Maintenance and Repair Services

---

**EXHIBIT D – PRICING PAGE**

**Comprehensive Inspection, Preventive Maintenance and Corrective Maintenance:**

Monthly Charge	x	12 months	=	Total Yearly Charge
----------------	---	-----------	---	---------------------

<u>\$ 361</u>	x	12	=	<u>\$ 4,332</u>
---------------	---	----	---	-----------------

Semi-Annual Charge	x	Twice Annually	=	Total Yearly Charge
--------------------	---	----------------	---	---------------------

<u>\$ 1,447</u>	x	2	=	<u>\$ 2,894</u>
-----------------	---	---	---	-----------------

Annual Charge	x	Annually	=	Total Yearly Charge
---------------	---	----------	---	---------------------

<u>\$ 16,675</u>	x	1	=	<u>\$ 16,675</u>
------------------	---	---	---	------------------

<b>TOTAL MONTHLY/SEMI-ANNUAL AND ANNUAL COST:</b>				<u><b>\$ 23,901</b></u>
---	--	--	--	-------------------------

July 7, 2020



Non-Compliant Purchases Memorandum

TO: Angela White-Negley

FROM: Becky Neace

DATE: 5/31/2022

RE: MU21HHCHILLER (P2101781)

The vendor reached out in regards of a price increase in March 2022 for the upcoming renewal. After several weeks of price negotiating, an amount was agreed upon. The vendor developed the price increase proposal on May 2, 2022 thus making this after-the-fact.

In the future, I will keep communicating with the vendor in a timely manner to prevent a delay in the contract renewal being processed. Please accept this after-the-fact for change order 1 to contract MU21HHCHILLER (P2101781).

  
\_\_\_\_\_  
Signature of Employee Responsible for Purchase

  
\_\_\_\_\_  
Date

  
\_\_\_\_\_  
Signature of Director of Purchasing

  
\_\_\_\_\_  
Date

  
\_\_\_\_\_  
Signature of VP of Operations

  
\_\_\_\_\_  
Date