



# Brevard Academy

## Monthly Finance Meeting

Published on August 18, 2025 at 8:03 PM EDT

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### Date and Time

Tuesday August 19, 2025 at 8:30 AM EDT

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### Mission:

The Mission of Brevard Academy is to prepare its students to achieve academic excellence through the Core Knowledge Sequence. Through a partnership involving students, teachers, and parents the school strives to create citizens with strong moral character and active intellectual inquiry.

### Vision:

Brevard Academy: A Challenge Foundation Academy (BA-CFA) a K-8 public charter school develops and encourages motivated, intellectually curious students who are skilled in critical thinking, individual expression, and problem-solving. From their diverse backgrounds, students accept our challenge to pursue personal and academic excellence. Through this pursuit, they become confident members of their community who lead by serving others.

### Strategic Goals:

1. Provide Effective & Innovative Learning Environments
  2. Recruit, Hire and Retain Highly Effective Personnel
  3. Use Resources Effectively & Be Fiscally Responsible
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### Agenda

	Purpose	Presenter	Time
<b>I. Opening Items</b>			<b>8:30 AM</b>
<b>A.</b> Record Attendance			1 m
<b>B.</b> Call the Meeting to Order		Ted Duncan	1 m
<b>C.</b> Approve Minutes	Approve Minutes	Juli Lefler	1 m
Approve minutes for Monthly Finance Meeting on June 17, 2025			
<b>D.</b> Approve Agenda	Vote	Ted Duncan	1 m
<b>II. Finance Committee Reports</b>			<b>8:34 AM</b>
<b>A.</b> Review Financial Reports	Discuss	Ted Duncan	15 m
Monthly Board Report			
Reconciliation Files			
Annual Encumbrance Spreadsheet			
<b>B.</b> Vendor Contract Renewals	FYI	Juli Lefler	5 m
Final Site--Messaging System			
Updated Contracted Custodial Contract			
<b>C.</b> USDA Update	FYI	Paul Cooper	5 m
<b>D.</b> Treasurer Report Template	Discuss	Paul Cooper	5 m
<b>III. New Business</b>			<b>9:04 AM</b>
<b>A.</b> Staff Recruitment Bonus	Discuss	Ted Duncan	5 m
<b>B.</b> Trane Contract	Discuss	Ted Duncan	5 m
<b>IV. Other Business</b>			<b>9:14 AM</b>
<b>A.</b> Review Committee Goals	FYI	Ted Duncan	5 m
<b>B.</b> School Needs	Discuss	Ted Duncan	10 m

	Purpose	Presenter	Time
	<ul style="list-style-type: none"><li>• Music Room Improvements</li><li>• Musical Instruments</li><li>• Instructional Furniture 6-8 Grade--Summer 2026</li><li>• Athletics Vans</li></ul>		
<b>V. Action Items</b>			<b>9:29 AM</b>
<b>A.</b> Board Action Items	Discuss	Ted Duncan	5 m
<b>VI. Closing Items</b>			<b>9:34 AM</b>
<b>A.</b> Announce Date of Next Meeting	FYI	Ted Duncan	1 m
<b>B.</b> Adjourn Meeting	Vote		

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*This meeting is a public meeting of the BA-CFA Finance Committee in public for the purpose of conducting the School Corporation's business and is not to be considered a public community meeting.*

# Coversheet

## Approve Minutes

<b>Section:</b>	I. Opening Items
<b>Item:</b>	C. Approve Minutes
<b>Purpose:</b>	Approve Minutes
<b>Submitted by:</b>	
<b>Related Material:</b>	Minutes for Monthly Finance Meeting on June 17, 2025

APPROVED



## Brevard Academy

### Minutes

#### Monthly Finance Meeting

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##### **Date and Time**

Tuesday June 17, 2025 at 8:30 AM

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##### **Mission:**

The Mission of Brevard Academy is to prepare its students to achieve academic excellence through the Core Knowledge Sequence. Through a partnership involving students, teachers, and parents the school strives to create citizens with strong moral character and active intellectual inquiry.

##### **Vision:**

Brevard Academy: A Challenge Foundation Academy (BA-CFA) a K-8 public charter school develops and encourages motivated, intellectually curious students who are skilled in critical thinking, individual expression, and problem-solving. From their diverse backgrounds, students accept our challenge to pursue personal and academic excellence. Through this pursuit, they become confident members of their community who lead by serving others.

##### **Strategic Goals:**

1. Provide Effective & Innovative Learning Environments
  2. Recruit, Hire and Retain Highly Effective Personnel
  3. Use Resources Effectively & Be Fiscally Responsible
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##### **Committee Members Present**

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Juli Lefler (remote), Paul Cooper, Ted Duncan

### **Committee Members Absent**

Emily Webb

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## **I. Opening Items**

### **A. Record Attendance**

### **B. Call the Meeting to Order**

Ted Duncan called a meeting of the Finance Committee of Brevard Academy to order on Tuesday Jun 17, 2025 at 8:32 AM.

### **C. Approve Minutes**

Paul Cooper made a motion to approve the minutes from Monthly Finance Meeting on 05-20-25.

Juli Lefler seconded the motion.

The committee **VOTED** unanimously to approve the motion.

### **D. Approve Agenda**

Paul Cooper made a motion to Approve agenda.

Juli Lefler seconded the motion.

The committee **VOTED** unanimously to approve the motion.

## **II. Finance**

### **A. Review Financial Reports**

We reviewed the financial reports.

### **B. Vendor Contract Renewals**

Insurance renewal.

### **C. USDA Update**

USDA Reserve Increase needs to increase by \$83,630.17 to \$133,560.00.

We discussed moving all funds to First Bank to earn a higher level of interest.

Paul has engaged with Bruce and Jeff to move the application process along.

## **III. Other Business**

#### **A. Review Committee Goals**

We are on track on our goals.

#### **B. School Needs**

Work vehicle savings on the encumbered spreadsheet.

### **IV. Action Items**

#### **A. Board Action Items**

1. Renew Insurance with Utica at standard market rates.
2. Add a work vehicle (pick-up truck) to the encumbered spreadsheet at \$25,000.00 over 12 months.
3. Move funds from First Citizens to First Bank to capitalize on higher interest rates.
  1. State Retirement Escrow=\$52,000.00
  2. USDA Reserve=\$133,560.00
  3. Money Market (2.9%)=\$1.6 million.
  4. Operating Account=\$324,000.00

### **V. Closing Items**

#### **A. Announce Date of Next Meeting**

August--TBD

#### **B. Adjourn Meeting**

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 9:19 AM.

Respectfully Submitted,  
Paul Cooper

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*This meeting is a public meeting of the BA-CFA Finance Committee in public for the purpose of conducting the School Corporation's business and is not to be considered a public community meeting.*

# Coversheet

## Review Financial Reports

<b>Section:</b>	II. Finance Committee Reports
<b>Item:</b>	A. Review Financial Reports
<b>Purpose:</b>	Discuss
<b>Submitted by:</b>	
<b>Related Material:</b>	03_BOARD_REPORT_2025_06_BREVARD_ACADEMY_20250818.pdf PROD_Cash Board (1).pdf 02. 2025.07 Bank Recon Summary 1094 - Brevard.pdf 02. 2025.07 Bank Recon Summary PEX - Brevard.pdf 02. 2025.07 Bank Recon Summary 9079 - Brevard.pdf 02. 2025.07 Bank Recon Summary 2033 & 8870 - Brevard.pdf 03_BOARD_REPORT_2025_07_BREVARD_ACADEMY_20250818.pdf





## BREVARD ACADEMY

### Budget Analysis Report (Unreconciled)

Fiscal Year: 2025 - June

Account	Budget	Period Activity	YTD Activity	Remaining Budget	% Used	EOY Projection	Notes
<b>Revenues</b>							
▶ State Revenue	3,908,377.00	133,912.67	3,947,239.96	-38,862.96	100.99	3,905,178.80	
▶ Local Revenue	1,698,990.64	484,117.86	1,820,411.58	-121,420.94	107.15	2,097,577.17	
▶ Federal Revenue	180,703.39	23,831.03	200,232.14	-19,528.75	110.81	199,779.52	
▶ Before and After School Revenue	50,063.00	4,672.50	53,449.00	-3,386.00	106.76	48,726.00	
▶ Athletics Revenue	12,200.00	570.00	19,384.74	-7,184.74	158.89	19,384.74	
▶ Band/Music Revenue	5,500.00	0.00	200.00	5,300.00	3.64	1,200.00	
▶ School Activities Revenue	10,630.80	3,011.99	15,256.33	-4,625.53	143.51	18,623.61	
▶ Field Trip Revenue	29,641.00	2,196.00	21,572.16	8,068.84	72.78	37,331.61	
<b>Revenues</b>	<b>5,896,105.83</b>	<b>652,312.05</b>	<b>6,077,745.91</b>	<b>-181,640.08</b>	<b>103.08</b>	<b>6,327,801.45</b>	
Account	Budget	Period Activity	YTD Activity	Remaining Budget	% Used	EOY Projection	Notes
<b>Expenses</b>							
▶ Salaries and Bonuses	2,740,705.50	262,892.32	2,749,106.59	-8,401.09	100.31	2,859,577.55	
▶ Benefits	1,285,168.56	109,252.08	1,188,773.72	96,394.84	92.50	1,220,785.30	
▶ Books and Supplies	97,700.00	4,632.96	94,487.43	3,212.57	96.71	101,142.58	
▶ Athletics	24,907.82	-42.68	25,950.23	-1,042.41	104.19	28,749.80	
▶ Office Supplies	46,500.00	5,465.67	52,144.18	-5,644.18	112.14	52,852.59	
▶ Technology	95,500.00	39,022.24	125,114.64	-29,614.64	131.01	174,753.91	
▶ Equipment and Leases	30,400.00	1,822.75	31,245.07	-845.07	102.78	33,473.20	
▶ Contracted Student Services	114,500.00	9,738.68	128,582.43	-14,082.43	112.30	129,057.43	
▶ Staff Development	48,209.07	1,164.31	54,945.02	-6,735.95	113.97	62,618.70	
▶ Administrative Services	266,110.00	93,029.98	444,027.28	-177,917.28	166.86	439,466.09	
▶ Insurances	60,175.40	2,101.65	53,930.40	6,245.00	89.62	60,175.40	
▶ Rents & Debt Service	312,223.00	297,809.96	329,258.88	-17,035.88	105.46	330,420.88	
▶ Facilities Building	96,500.00	7,875.79	179,589.85	-83,089.85	186.10	198,320.54	
▶ Facilities Grounds	26,479.49	0.00	17,534.80	8,944.69	66.22	22,000.00	
▶ Utilities	64,000.00	12,196.01	78,421.03	-14,421.03	122.53	80,613.01	
▶ Nutrition & Food	69,500.00	5,838.73	97,343.87	-27,843.87	140.06	103,579.54	
▶ Transportation & Travel	46,000.00	1,618.63	169,615.75	-123,615.75	368.73	185,046.00	
▶ Before & After Care Program	18,500.00	2,890.97	14,252.68	4,247.32	77.04	12,551.56	
▶ School Activities Expenses	11,750.00	1,690.62	16,226.85	-4,476.85	138.10	20,543.12	
▶ Field Trip Expenses	34,222.29	0.00	33,587.98	634.31	98.15	40,195.88	
▶ Fundraising Expenses	7,000.00	130.66	6,483.73	516.27	92.62	11,557.53	
▶ Federal Grant Expenses	3,382.69	0.00	10,860.76	-7,478.07	321.07	14,243.45	
<b>Expenses</b>	<b>5,499,433.82</b>	<b>859,131.33</b>	<b>5,901,483.17</b>	<b>-402,049.35</b>	<b>107.31</b>	<b>6,181,724.06</b>	
<b>Surplus/(DEFICIT)</b>	<b>396,672.01</b>	<b>-206,819.28</b>	<b>176,262.74</b>	<b>220,409.27</b>	<b>-4.23</b>	<b>146,077.39</b>	

August 18, 2025

# PROD: Cash Board

Controls  
& Filters

School Name contains BREVARD ACADEMY  
Month, Year contains May, 2025  
Comparative School Size (Click to Select) is Small

PROD: Cash Board

# The Cash Board

Comparative School Size (Click to Select)

All

Small

Medium

Large

School Size Breakdown: *Small*: 0-400 ADM | *Medium*: 401-800 ADM | *Large*: 801+ ADM

Select School

BREVARD ACADEMY

Select Period

May, 2025

Your School Size:

Medium

Cash On Hand

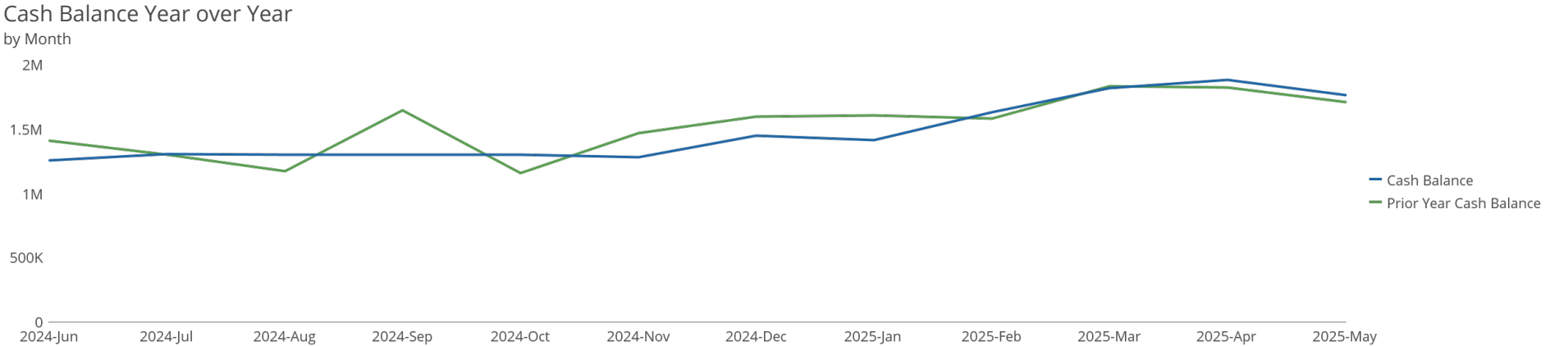
842.52KComp AVG

1.77M

Cash on Hand

80Comp AVG

108.49

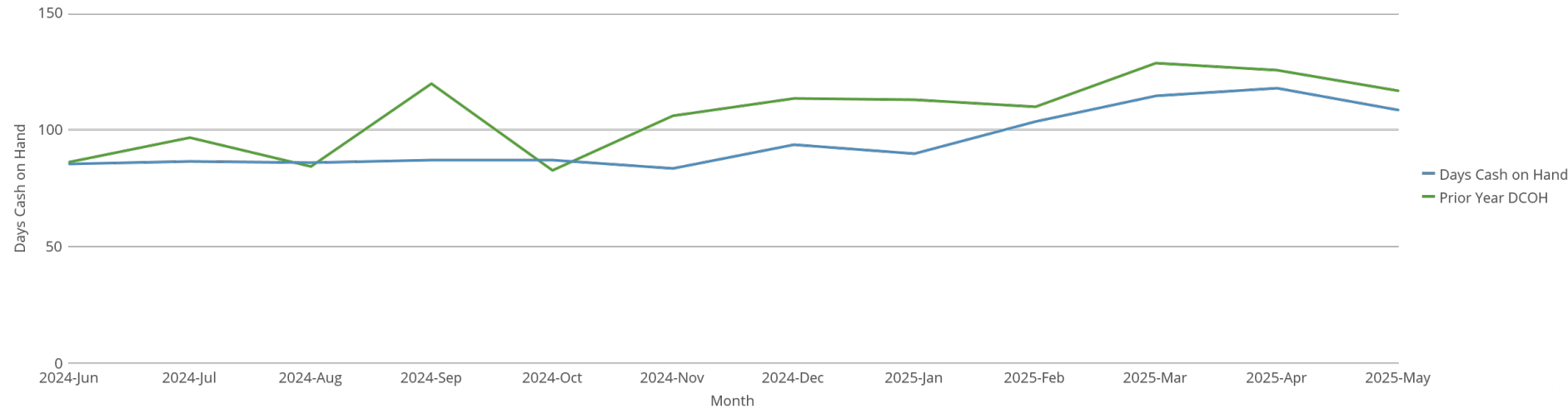


Controls  
& Filters

School Name contains BREVARD ACADEMY  
Month, Year contains May, 2025  
Comparative School Size (Click to Select) is Small

PROD: Cash Board

Days Cash on Hand  
by Month



\*Days cash on Hand is calculated using the either the projected EOY expenses if tracked through Insights or the annual budgeted expenses.

Disclaimer: This data is based solely on information recorded in LINQ and may differ from information included in your financial statement audit. This data should be used for discussion purposes, but not relied upon solely for compliance with NC DPI, loan covenants, or other official requirements based on audited financial statement data.

Controls  
& Filters

School Name contains BREVARD ACADEMY

**BREVARD ACADEMY**

**Bank Reconciliation Summary**

**Bank: 1stCT 1094 - First Citizens 1094-USDA Reser**  
**Statement Ending Date: 07/31/2025**

Statement Balance:	\$49,938.18
Outstanding Checks:	\$0.00
Outstanding Deposits:	\$0.00
Adjusted Balance:	\$49,938.18
Book Balance:	\$49,938.18
Difference:	\$0.00

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**BREVARD ACADEMY**

**Bank Reconciliation Summary**

**Bank: PEX - PEX ACCT**

**Statement Ending Date: 07/31/2025**

Statement Balance:	\$45,607.72
Outstanding Checks:	\$0.00
Outstanding Deposits:	\$0.00
Adjusted Balance:	\$45,607.72
Book Balance:	\$45,607.72
Difference:	\$0.00

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**BREVARD ACADEMY**

**Bank Reconciliation Summary**

**Bank: 1ST BNK MM - FIRST BANK MONEY MARKET - 9079**  
**Statement Ending Date: 07/31/2025**

Statement Balance:	\$52,947.19
Outstanding Checks:	\$0.00
Outstanding Deposits:	\$0.00
Adjusted Balance:	\$52,947.19
Book Balance:	\$52,947.19
Difference:	\$0.00

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**BREVARD ACADEMY**

**Bank Reconciliation Summary**

**Bank: 1STBK 2033 - OP FIRST BANK 2033**

**Statement Ending Date: 07/31/2025**

Statement Balance:	\$1,399,659.03
Outstanding Checks:	\$44,530.89
Outstanding Deposits:	\$0.00
Adjusted Balance:	\$1,355,128.14
Book Balance:	\$1,355,128.14
Difference:	\$0.00

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## BREVARD ACADEMY

### Budget Analysis Report (Unreconciled)

Fiscal Year: 2026 - July

Account	Budget	Period Activity	YTD Activity	Remaining Budget	% Used	EOY Projection	Notes
<b>Revenues</b>							
▶ State Revenue	3,763,660.00	307,004.44	307,004.44	3,456,655.56	8.16	3,763,660.00	
▶ Local Revenue	1,560,694.00	65,139.53	65,139.53	1,495,554.47	4.17	1,623,322.69	
▶ Federal Revenue	180,704.00	1,827.23	1,827.23	178,876.77	1.01	180,704.00	
▶ Before and After School Revenue	50,063.00	180.00	180.00	49,883.00	0.36	50,063.00	
▶ Athletics Revenue	12,200.00	-100.00	-100.00	12,300.00	-0.82	12,200.00	
▶ Band/Music Revenue	5,500.00	0.00	0.00	5,500.00	0.00	5,500.00	
▶ School Activities Revenue	10,631.00	0.00	0.00	10,631.00	0.00	10,631.00	
▶ Field Trip Revenue	14,897.00	0.00	0.00	14,897.00	0.00	14,897.00	
<b>Revenues</b>	<b>5,598,349.00</b>	<b>374,051.20</b>	<b>374,051.20</b>	<b>5,224,297.80</b>	<b>6.68</b>	<b>5,660,977.69</b>	
Account	Budget	Period Activity	YTD Activity	Remaining Budget	% Used	EOY Projection	Notes
<b>Expenses</b>							
▶ Salaries and Bonuses	2,769,769.00	220,668.84	220,668.84	2,549,100.16	7.97	2,776,901.50	
▶ Benefits	1,251,458.00	94,101.93	94,101.93	1,157,356.07	7.52	1,251,458.00	
▶ Books and Supplies	95,900.00	5,095.88	5,095.88	90,804.12	5.31	96,122.78	
▶ Athletics	24,908.00	668.47	668.47	24,239.53	2.68	24,908.00	
▶ Office Supplies	48,500.00	2,768.42	2,768.42	45,731.58	5.71	48,500.00	
▶ Technology	95,500.00	1,847.62	1,847.62	93,652.38	1.93	95,500.00	
▶ Equipment and Leases	30,400.00	186.12	186.12	30,213.88	0.61	30,400.00	
▶ Contracted Student Services	114,500.00	182.73	182.73	114,317.27	0.16	114,682.73	
▶ Staff Development	56,709.00	17,255.44	17,255.44	39,453.56	30.43	63,201.45	
▶ Administrative Services	266,110.00	35,906.83	35,906.83	230,203.17	13.49	269,826.60	
▶ Insurances	60,175.00	14,711.10	14,711.10	45,463.90	24.45	60,175.00	
▶ Rents & Debt Service	312,223.00	0.00	0.00	312,223.00	0.00	312,223.00	
▶ Facilities Building	96,500.00	6,662.20	6,662.20	89,837.80	6.90	96,500.00	
▶ Facilities Grounds	26,479.00	0.00	0.00	26,479.00	0.00	26,479.00	
▶ Utilities	64,000.00	385.06	385.06	63,614.94	0.60	64,000.00	
▶ Nutrition & Food	69,500.00	80.62	80.62	69,419.38	0.12	69,500.00	
▶ Transportation & Travel	46,000.00	88,517.77	88,517.77	-42,517.77	192.43	130,305.75	
▶ Before & After Care Program	18,500.00	10.30	10.30	18,489.70	0.06	18,500.00	
▶ School Activities Expenses	11,750.00	108.58	108.58	11,641.42	0.92	11,858.58	
▶ Field Trip Expenses	34,223.00	0.00	0.00	34,223.00	0.00	34,223.00	
▶ Fundraising Expenses	7,000.00	0.00	0.00	7,000.00	0.00	7,000.00	
▶ Federal Grant Expenses	3,383.00	0.00	0.00	3,383.00	0.00	3,383.00	
<b>Expenses</b>	<b>5,503,487.00</b>	<b>489,157.91</b>	<b>489,157.91</b>	<b>5,014,329.09</b>	<b>8.89</b>	<b>5,605,648.39</b>	
<b>Surplus/(DEFICIT)</b>	<b>94,862.00</b>	<b>-115,106.71</b>	<b>-115,106.71</b>	<b>209,968.71</b>	<b>-2.21</b>	<b>55,329.30</b>	

# Coversheet

## Treasurer Report Template

<b>Section:</b>	II. Finance Committee Reports
<b>Item:</b>	D. Treasurer Report Template
<b>Purpose:</b>	Discuss
<b>Submitted by:</b>	
<b>Related Material:</b>	Brevard_Treasurer_s_Monthly_Check__1_.pdf

Treasurer/Finance Committee/Administrator steps to fulfilling fiduciary duty to the Board of Directors:

1. Open 06. Balance Sheet - check the 'Net Gain (Loss)' matches the same periods 'Surplus/(Deficit)' in YTD column on the current budget report.
2. Open 01. Bank Statement(s) and 02. Bank Recon Summary for all accounts - check that the Ending Balance on the bank statement matches the Statement Balance on the Bank Recon and that the Difference on the Bank Recon is \$0.00. Sign the 02. Bank Recon Summary for each account.
3. Review the EOY projection column and corresponding notes on the current month's budget report. Compare the Surplus/(Deficit) to the prior month EOY projection. Ask the appropriate school personnel for highlights to the changes to the EOY projection.
4. Report the following to the Board of Directors:
  - a. Total Revenue MTD and YTD
  - b. Total Expenses MTD and YTD
  - c. Total Surplus MTD and YTD
  - d. EOY Projected Revenue and Expenses
  - e. EOY Projected Surplus/(Deficit) and highlight changes from prior month projection.

# Coversheet

## Staff Recruitment Bonus

<b>Section:</b>	III. New Business
<b>Item:</b>	A. Staff Recruitment Bonus
<b>Purpose:</b>	Discuss
<b>Submitted by:</b>	
<b>Related Material:</b>	Staff Student Recruitment.pdf

## **Staff Student Recruitment**

### Goals:

- Reach full enrollment.
- Provide additional bonuses to staff members.

### How it works:

- For each student a staff member recruits to enroll at BA, he/she will get a bonus of \$250 if the student stays enrolled through December.
- If the student reenrolls the following year, the staff member would receive an additional bonus of \$250.

Bonuses are paid out in January each year.

Proposed

# Coversheet

## Trane Contract

<b>Section:</b>	III. New Business
<b>Item:</b>	B. Trane Contract
<b>Purpose:</b>	Discuss
<b>Submitted by:</b>	
<b>Related Material:</b>	Brevard Academy CMSA 2025.pdf



## CONNECTED MECHANICAL SERVICE AGREEMENT

**Trane Office**

Trane U.S. Inc.  
168 Sweeten Creek Road  
Asheville, NC 28803

**Trane Representative**

Matt Ballenger  
Cell: (864) 640-6369  
Office: (828) 277-8664

**Proposal ID**

8336353

**Master Agreement**

NEW

**Contact Telephone Number for Service**

(828) 210-2612

**Company Name**

Brevard Academy  
1110 Hendersonville Hwy  
Pisgah Forest, NC 28768-2876  
Trina Burns

**Site Address**

Brevard Academy  
1110 Hendersonville Hwy  
Pisgah Forest, NC 28768

August 05, 2025



## EXECUTIVE SUMMARY

### Connected Mechanical Service Agreement

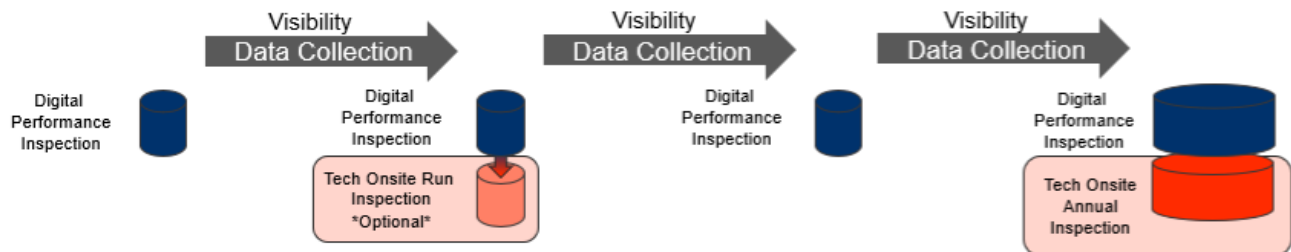
Supplement your standard Trane mechanical service agreement with remote inspections that leverage our digital analytics to uncover service and maintenance needs. We can check in on your site more often.

- Your Trusted Trane Technician is now equipped with even more service tools to help ensure your connected assets' performance
- Digital Analytics are running 24/7/365, collecting data from your connected equipment and better arming your technician with added insights
- Gain priority for unplanned problems and achieve quicker response time using your remote connection
- Less Business Disruption - chiller does not need to be running to perform inspection
- Equipment perform better = use less energy + less carbon emissions

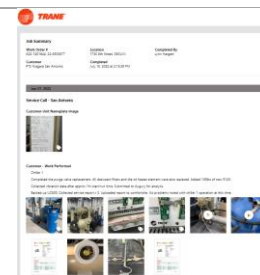
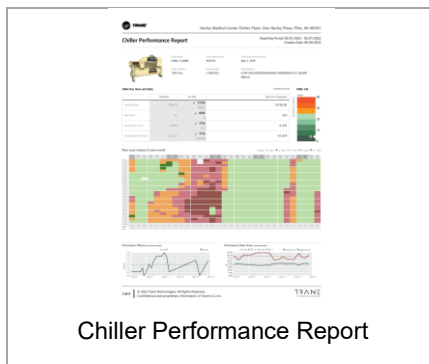


### What can you expect?

24/7/365 Visibility into chiller operation through continuous data collection to support your on-site and remote digital inspections.



### Key Elements of this service



### Why Trane? We Focus on Better Buildings.

When it comes to service effectiveness, experience matters. No other provider has more experience than Trane.

- 100+ years of system and equipment experience
- 35+ years in building automation systems (BAS)
- 20+ years in energy services





## SCOPE OF SERVICES — STANDARD INCLUSIONS

### ANY HVAC SYSTEM IS ONLY AS STRONG AS ITS INDIVIDUAL MECHANICAL COMPONENTS

This service agreement with Trane protects and enhances full system functionality by ensuring that components are well maintained and functioning to OEM standards, and that the system is tailored to your needs. The following are the standard inclusions of your service agreement:

#### GETTING CONNECTED

**AM: delete if customer is already connected**

Whether your Trane Service relationship is new or you've been a customer for many years, it is easy to connect your HVAC equipment to Trane Connect™ Cloud.

Utilizing the controls that are already part of your HVAC Equipment either directly or via your Trane BAS, you can easily connect your building to the cloud and send data from your HVAC Equipment to Trane Connect.

#### Advantages:

- **Empower your Trane Technician:** Utilizing the data collected in the cloud and the Trane Digital Inspection Toolbox, your Trane Technician will be able to remotely inspect your equipment.
- **Access your HVAC equipment anywhere:** Additionally, Trane can setup remote access to your Trane BAS, Chiller Plant, Chillers or other HVAC equipment for unlimited users from your organization.
- **Flexible & Secure Connectivity Options:** Connect via your organization's network or utilizing Trane's cellular solution.



## CONNECTED BUILDING SERVICES WITH TRANE CONNECT™

Trane gives you a way to “see” what’s not physically evident using trend data that’s illustrated via dashboards in Trane Connect™. It’s a deeper level of information that enables you to understand what’s happening at the system level—so technicians can address root causes instead of the symptoms. You’ll get more bang from your service budget.

### Available Trane Connect Applications

Included with your agreement, you’ll receive additional benefits and reporting within the Trane Connect application. Customize your Trane Connect experience based on the needs of your job and goals of your organization.

	<b>Remote Access -</b> Control and manage your equipment, spaces and buildings while optimizing performance ( <i>Note: included for all Trane Controls customers</i> )		<b>Reports -</b> Measure your starting point to best evaluate where you’re seeing gains and how you can improve system performance and energy usage even further.
	<b>Service -</b> Remote and on-site service is enhanced through anytime, anywhere access to critical building information that informs how/when/where service is necessary.		<b>Dashboards -</b> Visualize and track the information most important to you, including opportunities for optimization and improvement.
	<b>Building &amp; Energy Applications -</b> Identify ways to unlock greater efficiency and comfort while maintaining control over spend and optimizing performance. Map energy use by date, time or space usage to reach your sustainability goals faster. ( <i>Note: requires separately connected Live Meter</i> )		<b>Utility Management -</b> Access to your energy use intensity and cost intensity analysis. ( <i>Note: requires utility bill access</i> )

Learn more on [Trane.com](https://www.trane.com)



## ON-SITE SCHEDULED MAINTENANCE

Factory authorized Trane service technicians perform all periodic maintenance, following OEM standards, to keep HVAC and BAS equipment running optimally and prevent unplanned downtime. Trane assumes all responsibilities for planning, scheduling and managing routine maintenance on Trane HVAC equipment and other brands.

### Implementation:

- Technician visits are scheduled in advance through one assigned maintenance team for all HVAC equipment brands
- On-site service is completed during normal business hours
- Receive consistent service outcomes through proprietary maintenance procedures



## REMOTE EQUIPMENT INSPECTIONS

Once your site is connected to our Trane Connect Cloud, your OEM Technician will be able to have 24/7/365 visibility into your equipment performance.

### Implementation:

- Adding remote inspections between on-site scheduled technician visits to increase equipment oversight and uptime
- Remote service is completed during normal business hours
- Deliver inspection summary and system maintenance recommendations
- Receive deeper insights through data and analysis from your connected equipment via equipment performance reports



PROPOSED SCHEDULE OF SERVICES

AM: Choose the table below that best suits your customer's needs. Update Service Solutions included

Service Solutions	Qty.	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC
On-site Scheduled Maintenance	4		X			X			X			X	
Remote Inspections	2					X						X	
Refrigerant Management	2					X						X	
Laboratory Analysis													



## HVAC EQUIPMENT COVERAGE

### Brevard Academy

The following "Covered Equipment" will be serviced at Brevard Academy:

Equipment	Qty	Manufacturer	Model Number	Serial Number	Asset Tag
Tracer SC	1	Trane	X136516950	E23D05193	SC-1

#### Service Description

#### Quantity Per Year

Connected Controls - Annual Inspection - Onsite (Service 1)	1
Connected Controls - Operating Inspection - Onsite (Service 2)	1
Connected Controls - Operating Inspection - Remote (Service 3)	4
Analyzation of System Applications (Service 4)	2
Analyzation of System Applications (Service 5)	4

Equipment	Qty	Manufacturer	Model Number	Serial Number	Asset Tag
Rooftop Air Conditioners - Generic	1	Trane	YHC060E3RZ	162210298L	RTU-1
Rooftop Air Conditioners - Generic	1	Trane	YSD300F3RZ	162110706D	RTU-2
Rooftop Air Conditioners - Generic	1	Trane	YSD300F3RZ	162110710D	RTU-3
Rooftop Air Conditioners - Generic	1	Trane	YSD300F3RZ	162110714D	RTU-5

#### Service Description

#### Quantity Per Year

CMSA RTU NTP_RT Onsite Connected Inspection - Additional Connected for Site (Service 6)	2
Commercial Package Rooftop (Greater than 10 tons) Cooling Pre-Season Annual Maintenance (Service 9)	1
Commercial Package Rooftop (Greater than 10 tons) Heating Pre-Season Annual Maintenance (Service 10)	1
Commercial Package Rooftop (Greater than 10 tons) Quarterly Maintenance (Service 11)	2
Rooftop NTP_RT Condenser Coil Cleaning (Service 15)	1
Rooftop Unit belt change (Service 16)	1
Rooftop Unit Filter replacement (Service 17)	4

Equipment	Qty	Manufacturer	Model Number	Serial Number	Asset Tag
Rooftop Air Conditioners - Generic	1	Trane	YHC092F3RZ	161914363L	RTU-4

#### Service Description

#### Quantity Per Year

CMSA RTU NTP_RT Onsite Connected Inspection - Additional Connected for Site (Service 6)	2
Commercial Package Rooftop (Greater than 10 tons) Cooling Pre-Season Annual Maintenance (Service 9)	1
Commercial Package Rooftop (Greater than 10 tons) Heating Pre-Season Annual Maintenance (Service 10)	1
Commercial Package Rooftop (Greater than 10 tons) Quarterly Maintenance (Service 11)	2
Rooftop NTP_RT Condenser Coil Cleaning (Service 15)	1
Rooftop Unit Filter replacement (Service 17)	4



Equipment	Qty	Manufacturer	Model Number	Serial Number	Asset Tag
Ductless Systems	1	Mitsubishi Electric US Inc	SUZ-KA09NA	1ZP00852	DSS

**Service Description****Quantity Per Year**

MiniSplit IDU Clean Air Filter (Service 7)	4
MiniSplit Operational Inspection (Service 8)	3
NTP MiniSplit Heat Pump Condenser Coil Cleaning (Service 12)	1
NTP MiniSplit Heat Pump Condenser Cooling Annual Inspection (Service 13)	1
NTP MiniSplit Heat Pump Condenser Heating Annual Inspection (Service 14)	1





## PRICING AND ACCEPTANCE

Trina Burns  
Brevard Academy  
1110 Hendersonville Hwy  
Pisgah Forest, NC 28768-2876

Site Address:  
Brevard Academy  
1110 Hendersonville Hwy  
Pisgah Forest, NC 28768

### Trane Service Agreement

This Service Agreement consists of the pages beginning with the title page entitled "Connected Mechanical Service Agreement," the consecutively numbered pages immediately following such title page, and includes and ends with the Trane Terms and Conditions (Service) (collectively, the "Service Agreement" or "Agreement"). Trane agrees to inspect and maintain the Covered Equipment according to the terms of this Service Agreement, including the "Terms and Conditions," and "Scope of Services" sections. Trane agrees to give preferential service to Service Agreement Customer over non-contract customers.

### Service Fee

As the fee(s) (the "Service Fee(s)") for the inspection and maintenance services described in the Scope of Services section with respect to the Covered Equipment, Customer agrees to pay to Trane the following amounts, plus applicable tax, as and when due.

Contract Year	Annual Amount - All Sites USD	Payment USD	Payment Term
Year 1	19,658.00	4,914.50	Quarterly
Year 2	20,218.00	5,054.50	Quarterly
Year 3	20,800.00	5,200.00	Quarterly

☐ Anticipation Discount Program (ADP). A one-time **3.00%** discount is offered for full payment of 1 year in advance of the commencement of the Service Agreement. Invoice would be issued at start of the Agreement and is due net 15 days from date of invoice. The discount would be **\$589.74 USD** if this option is selected. Tax will be calculated based upon the pre-discounted price. The ADP is for advance payment only under the terms stated in this section and is not applicable to credit card transactions. Please check the box to select this discount option.

In addition to any other amounts then due hereunder, if this Agreement is terminated or cancelled prior to its scheduled expiration, Customer shall pay to Company the balance of any amounts billed to but unpaid by Customer and, if a "Service Project" is included in the Agreement, the Cancellation Fee set forth in "Exhibit A" Cancellation Schedule attached hereto and incorporated herein, which Cancellation Fee represents unbilled labor, non-labor expenses and parts materials and components. Subject only to a prior written agreement signed by Trane, payment is due upon receipt of invoice in accordance with Section 4 of the attached Terms and Conditions.

### Tariffs

Trane shall have the right, at its discretion, to pass along any related increases should (1) its costs related to the manufacture, supply, and shipping for any product or service materially increase. This includes, but is not limited to, cost increases in raw materials, supplier components, labor, utilities, freight, logistics, wages and benefits, regulatory compliance, or any other event beyond Company's control and/or (2) any tariffs, taxes, levies or fees affecting, placed on or related to any product or service materially increases.

### Term

The Initial Term of this Service Agreement is 3 years, beginning September 1, 2025. However, Trane's obligation under this Agreement will not begin until authorized representatives of Trane and Customer have both signed this Agreement in the spaces provided below.

Following expiration of the initial term on August 31, 2028, this Agreement shall renew automatically for successive periods of 3 years (the "Renewal Term") until terminated as provided herein. If you do not want to renew this Agreement for the Renewal Term, please notify Trane by telephone or by U.S. mail prior to the expiration date set forth in the preceding sentence. If any questions arise regarding this Service Agreement or how to cancel this Agreement, Trane can be reached either by telephone at (828) 210-2612 or by direct mail addressed to: 168 Sweeten Creek Road, Asheville, NC 28803.



### Renewal Pricing Adjustment

The Service Fees for an impending Renewal Term shall be the current Service Fees (defined as the Service Fees for the initial Term or Renewal Term immediately preceding the impending Renewal Term) annually adjusted based on changes to the cost of service. The Service Fees for an impending Renewal Term shall be set forth in the service renewal letter furnished to Customer.

### Cancellation by Customer Prior to Services; Refund

If Customer cancels this Agreement within (a) thirty (30) days of the date this Agreement was mailed to Customer or (b) twenty (20) days of the date this Agreement was delivered to Customer, if it was delivered at the time of sale, and if no Services have been provided by Company under this Agreement, the Agreement will be void and Company will refund to Customer, or credit Customer's account, the full Service Fee of this Agreement that Customer paid to Company, if any. A ten percent (10%) penalty per month will be added to a refund that is due but is not paid or credited within forty-five (45) days after return of this Agreement to Company. Customer's right to cancel this Agreement only applies to the original owner of this Agreement and only if no Services have been provided by Company under this Agreement prior to its return to Company.

### Cancellation by Company

This Agreement may be cancelled during the Initial Term or, if applicable, a Renewal Term for any reason or no reason, upon written notice from Company to Customer no later than 30 days prior to the scheduled expiration date and Company will refund to Customer, or credit Customer's account, that part of the Service Fee attributable to Services not performed by Company. Customer shall remain liable for and shall pay to Company all amounts due for Services provided by Company and not yet paid.

**This agreement is subject to Customer's acceptance of the attached Trane Terms and Conditions (Service).**

CUSTOMER ACCEPTANCE	TRANE ACCEPTANCE Trane U.S. Inc.
_____ Authorized Representative	_____ Submitted By: Matt Ballenger
_____ Printed Name	_____ Proposal Date: August 05, 2025
_____ Title	_____ Cell: (864) 640-6369
_____ Purchase Order	_____ Office: (828) 277-8664
_____ Acceptance Date	_____ License Number:
	_____ Authorized Representative
	_____ Title
	_____ Signature Date

The Initial Term of this Service Agreement is 3 years, beginning September 1, 2025.  
Total Contract Amount: \$60,676.00 USD.





## TERMS AND CONDITIONS - SERVICE

"Company" shall mean Trane U.S. Inc. dba Trane for Company performance in the United States and Trane Canada ULC for Company performance in Canada.

**1. Agreement.** These terms and conditions ("Terms") are an integral part of Company's offer and form the basis of any agreement (the "Agreement") resulting from Company's proposal (the "Proposal") for the following commercial services as stated in the Proposal (collectively, the "Services"): inspection, maintenance and repair (the "Maintenance Services") on equipment (the "Covered Equipment"), specified Additional Work (if any), and, if included in the Proposal, Intelligent Services, Energy Assessment, and any other services using remote connectivity (collectively and individually referred to in these Terms as "Trane Digital Services"). **COMPANY'S TERMS ARE SUBJECT TO PERIODIC CHANGE OR AMENDMENT.**

**2. Connected Services.** In addition to these terms and conditions, the Connected Services Terms of Service ("Connected Services Terms"), available at <https://www.trane.com/TraneConnectedServicesTerms>, as updated from time to time, are incorporated herein by reference and shall apply to the extent that Company provides Customer with Connected Services, as defined in the Connected Services Terms.

**3. Acceptance.** The Proposal is subject to acceptance in writing by the party to whom this offer is made or an authorized agent ("Customer") delivered to Company within 30 days from the date of the Proposal. If Customer accepts the Proposal by placing an order, without the addition of any other terms and conditions of sale or any other modification, Customer's order shall be deemed acceptance of the Proposal subject to these Terms and Conditions. If Customer's order is expressly conditioned upon Company's acceptance or assent to terms and/or conditions other than those expressed herein, return of such order by Company with Company's Terms and Conditions attached or referenced serves as Company's notice of objection to Customer's terms and as Company's counteroffer to perform in accordance with the Proposal and Company Terms and Conditions. If Customer does not reject or object in writing to Company within 10 days, Company's counteroffer will be deemed accepted. Customer's acceptance of performance by Company will in any event constitute an acceptance by Customer of Company's Terms and Conditions. This Agreement is subject to credit approval by Company. Upon disapproval of credit, Company may delay or suspend performance or, at its option, renegotiate prices and/or Terms and Conditions with Customer. If Company and Customer are unable to agree on such revisions, this Agreement shall be cancelled without any liability, other than Customer's obligation to pay for Services provided by Company to the date of cancellation.

**4. Fees and Taxes.** Fees for the Services (the "Service Fees") are as set forth in the Proposal. Except as otherwise stated in the Proposal, Service Fees are based on performance during regular business hours. Charges for performance outside Company's normal business hours shall be billed separately according to the then prevailing overtime or emergency labor/labour rates. In addition to the stated Service Fees, Customer shall pay all taxes not legally required to be paid by Company or, alternatively, shall provide Company with an acceptable tax exemption certificate.

**5. Payment.** Payment is due upon receipt of Company's invoice. Service Fees shall be paid no less frequently than quarterly and in advance of performance of the Services. Company reserves the right to add to any account outstanding for more than 30 days a service charge equal to the lesser of the maximum allowable legal interest rate or 1.5% of the principal amount due at the end of each month. Without liability to Customer, Company may discontinue performance whenever payment is overdue. Customer shall pay all costs (including attorneys' fees) incurred by Company in attempting to collect amounts due or otherwise enforcing this Agreement.

**6. Customer Breach.** Each of the following constitutes a breach by Customer and shall give Company the right, without an election of remedies, to suspend performance or terminate this Agreement by delivery of written notice declaring termination. Upon termination, Customer shall be liable to the Company for all Services furnished to date and all damages sustained by Company (including lost profit and overhead): (a) Any failure by Customer to pay amounts when due; (b) any general assignment by Customer for the benefit of its creditors, Customer's bankruptcy, insolvency, or receivership; (c) Any representation or warranty furnished by Customer in connection with this Agreement is false or misleading in any material respect when made; or (d) Any failure by Customer to perform or comply with any material provision of this Agreement.

**7. Performance.** Company shall perform the Services in accordance with industry standards generally applicable in the state or province where the Services are performed under similar circumstances when Company performs the Services. Company may refuse to perform where working conditions could endanger property or put people at risk. Unless otherwise agreed by Customer and Company, at Customer's expense and before the Services begin, Customer will provide any necessary access platforms, catwalks to safely perform the Services in compliance with OSHA, state, or provincial industrial safety regulations or any other applicable industrial safety standards or guidelines. This Agreement presupposes that all major pieces of Covered Equipment are in proper operating condition as of the date hereof. Services furnished are premised on the Covered Equipment being in a maintainable condition. In no event shall Company have any obligation to replace Covered Equipment that is no longer maintainable. During the first 30 days of this Agreement, or upon initial inspection, and/or upon seasonal start-up (if included in the Services), if an inspection by Company of Covered Equipment indicates repairs or replacement is required, Company will provide a written quotation for such repairs or replacement. If Customer does not authorize such repairs or replacement, Company may remove the unacceptable equipment from the Covered Equipment and adjust the Service Fees accordingly. Customer authorizes Company to utilize Customer's telephone line or network infrastructure to connect to controls, systems and/or equipment provided or serviced by Company and to provide Services contracted for or otherwise requested by Customer, including remote diagnostic and repair service. Customer acknowledges that Company is not responsible for any adverse impact to Customer's communications and network infrastructure. Company may elect to install/attach to Customer equipment or provide portable devices (hardware and/or software) for execution of control or diagnostic procedures. Such devices shall remain the personal proprietary property of Company and in no event shall become a fixture of Customer locations. Customer shall not acquire any interest, title or equity in any hardware, software, processes, and other intellectual or proprietary rights to devices used in connection with the Services on Customer equipment. Company may remove such devices at its discretion. Parts used for any repairs made will be those selected by Company as suitable for the repair and may be parts not manufactured by Company.

**8. Customer Obligations.** Customer shall: (a) Provide Company reasonable and safe access to the Covered Equipment and areas where Company is to work; (b) Follow manufacturer recommendations concerning teardown and internal inspection, major overhaul, restoration or refurbishing of the Covered Equipment; unless expressly stated in the Scope of Services statement, Company is not performing any manufacturer recommended teardown and internal inspection, major overhaul, restoration or refurbishing of the Covered Equipment; and (c) Where applicable, unless water treatment is expressly included in the Services, provide professional cooling tower water treatment in accordance with any reasonable recommendations provided by Company.

**9. Exclusions.** Unless expressly included in the Covered Equipment or the Services, the Services do not include, and Company shall not be responsible for or liable to the Customer for any claims, losses, damages or expenses suffered by the Customer in any way connected with, relating to or arising from, any of the following: (a) Any guarantee of room conditions or system performance; (b) Inspection, maintenance, repair, replacement of or services for: chilled water and condenser water pumps and piping; electrical disconnect switches or circuit breakers; motor starting equipment that is not factory mounted and interconnecting power wiring; recording or portable instruments, gauges or thermometers; non-moving parts or non-maintainable parts of the system, including, but not limited to, storage tanks; pressure vessels, shells, coils, tubes, housings, castings, casings, drain pans, panels, duct work; piping: hydraulic, hydronic, pneumatic, gas, or refrigerant; insulation; pipe covering; refractory material; fuses, unit cabinets; electrical wiring; ductwork or conduit; electrical distribution system; hydronic structural supports and similar items; the appearance of decorative casing or cabinets; damage sustained by other equipment or systems; and/or any failure, misadjustment or design deficiencies in other equipment or systems; (c) Damage, repairs or replacement of parts made necessary as a result of electrical power failure, low voltage, burned out main or branch fuses, low water pressure, vandalism, misuse or abuse, wear and tear, end of life failure, water damage, improper operation, unauthorized alteration of equipment, accident, acts or omissions of Customer or others, damage due to freezing weather, calamity, malicious act, or any Event of Force Majeure; (d) Any damage or malfunction resulting from vibration, electrolytic action, freezing, contamination, corrosion, erosion, or caused by scale or sludge on internal tubes except where water treatment protection services are provided by Company as part of this Agreement; (e) Furnishing any items of equipment, material, or labor/labour, or performing special tests recommended or required by insurance companies or federal, state, or local governments; (f) Failure or inadequacy of any structure or foundation supporting or surrounding the equipment to be worked on or any portion thereof; (g) Building access or alterations that might be necessary to repair or replace Customer's existing equipment; (h) The normal function of starting and stopping equipment or the opening and closing of valves, dampers or regulators normally installed to protect equipment against damage; (i) Valves that are not factory mounted: balance, stop, control, and other valves external to the device unless specifically included in the Agreement; (j) Any responsibility for design or redesign of the system or the Covered Equipment, obsolescence, safety tests, or removal or reinstallation of valve bodies and dampers; (k) Any services, claims, or damages arising out of Customer's failure to comply with its obligations under this Agreement; (l) Failure of Customer to follow manufacturer recommendations concerning teardown and internal inspection, overhaul and refurbishing of equipment; (m) Any claims, damages, losses, or expenses, arising from or related to conditions that existed in,



on, or upon the premises before the effective date of this Agreement ("Pre-Existing Conditions"), including, without limitation, damages, losses, or expenses involving pre-existing building envelope issues, mechanical issues, plumbing issues, and/or indoor air quality issues involving mold/mould and/or fungi; (n) Replacement of refrigerant is excluded, unless replacement of refrigerant is expressly stated as included within the Services, in which case replacement shall in no event exceed the stated percentage of rated system charge per year expressly stated in the Services; (o) crane or rigging costs; (p) Any Services, claims, or damages arising out of refrigerant not supplied by Company. Customer shall be responsible for: (i) The cost of any additional replacement refrigerant; (ii) Operation of any equipment; and (iii) Any claims, damages, losses, or expenses, arising from or related to work done by or services provided by individuals or entities that are not employed by or hired by Company.

**10. Limited Warranty.** Company warrants that: (a) the material manufactured by Company and provided to Customer in performance of the Services is free from defects in material and manufacture for a period of 12 months from the earlier of the date of equipment start-up or replacement; and (b) the labor/labour portion of the Maintenance Services and Additional Work has been properly performed for a period of 90 days from date of completion (the "Limited Warranty"). Company obligations of equipment start-up, if any are stated in the Proposal, are coterminous with the Limited Warranty period. Defects must be reported to Company within the Limited Warranty period. Company's obligation under the Limited Warranty is limited to repairing or replacing the defective part at its option and to correcting any labor/labour improperly performed by Company. No liability whatsoever shall attach to Company until the Maintenance Services and Additional Work have been paid for in full. Exclusions from this Warranty include claims, losses, damages and expenses in any way connected with, related to or arising from failure or malfunction of equipment due to the following: wear and tear; end of life failure; corrosion; erosion; deterioration; Customer's failure to follow the Company-provided maintenance plan; unauthorized or improper maintenance; unauthorized or improper parts or material; refrigerant not supplied by Company; and modifications made by others to equipment. Company shall not be obligated to pay for the cost of lost refrigerant or lost product. Some components of equipment manufactured by Company may be warranted directly from the component supplier, in which case this Limited Warranty shall not apply to those components and any warranty of such components shall be the warranty given by such component supplier. Notwithstanding the foregoing, all warranties provided herein terminate upon termination or cancellation of this Agreement. Equipment, material and/or parts that are not manufactured by Company ("Third-Party Product(s)") are not warranted by Company and have such warranties as may be extended by the respective manufacturer. **CUSTOMER UNDERSTANDS THAT COMPANY IS NOT THE MANUFACTURER OF ANY THIRD-PARTY PRODUCT(S) AND ANY WARRANTIES, CLAIMS, STATEMENTS, REPRESENTATIONS, OR SPECIFICATIONS ARE THOSE OF THE THIRD-PARTY MANUFACTURER, NOT COMPANY AND CUSTOMER IS NOT RELYING ON ANY WARRANTIES, CLAIMS, STATEMENTS, REPRESENTATIONS, OR SPECIFICATIONS REGARDING THE THIRD-PARTY PRODUCT THAT MAY BE PROVIDED BY COMPANY OR ITS AFFILIATES, WHETHER ORAL OR WRITTEN. THE REMEDIES SET FORTH IN THIS LIMITED WARRANTY ARE THE SOLE AND EXCLUSIVE REMEDIES FOR WARRANTY CLAIMS PROVIDED BY COMPANY TO CUSTOMER UNDER THIS AGREEMENT AND ARE IN LIEU OF ALL OTHER WARRANTIES AND LIABILITIES, LIABILITIES, CONDITIONS AND REMEDIES, WHETHER IN CONTRACT, WARRANTY, STATUTE OR TORT (INCLUDING NEGLIGENCE), EXPRESS OR IMPLIED, IN LAW OR IN FACT, INCLUDING ANY IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE AND/OR OTHERS ARISING FROM COURSE OF DEALING OR TRADE. COMPANY EXPRESSLY DISCLAIMS ANY REPRESENTATIONS OR WARRANTIES, ENDORSEMENTS OR CONDITIONS OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING ANY IMPLIED WARRANTIES OF QUALITY, FITNESS, MERCHANTABILITY, DURABILITY AND/OR OTHERS ARISING FROM COURSE OF DEALING OR TRADE OR REGARDING PREVENTION BY THE SCOPE OF SERVICES, OR ANY COMPONENT THEREOF. NO REPRESENTATION OR WARRANTY OF ANY KIND, INCLUDING WARRANTY OF MERCHANTABILITY OR FITNESS FOR PARTICULAR PURPOSE, REGARDING PREVENTING, ELIMINATING, REDUCING OR INHIBITING ANY MOLD, FUNGUS, BACTERIA, VIRUS, MICROBIAL GROWTH, OR ANY OTHER CONTAMINANTS (INCLUDING COVID-19 OR ANY SIMILAR VIRUS) (COLLECTIVELY, "CONTAMINANTS"), WHETHER INVOLVING OR IN CONNECTION WITH EQUIPMENT, ANY COMPONENT THEREOF, SERVICES OR OTHERWISE. IN NO EVENT SHALL COMPANY HAVE ANY LIABILITY FOR THE PREVENTION, ELIMINATION, REDUCTION OR INHIBITION OF THE GROWTH OR SPREAD OF SUCH CONTAMINANTS INVOLVING OR IN CONNECTION WITH ANY EQUIPMENT, THIRD-PARTY PRODUCT, OR ANY COMPONENT THEREOF, SERVICES OR OTHERWISE AND CUSTOMER HEREBY SPECIFICALLY ACKNOWLEDGES AND AGREES THERETO.**

**11. Indemnity.** To the maximum extent permitted by law, Company and Customer shall indemnify and hold harmless each other from any and all claims, actions, costs, expenses, damages and liabilities, including reasonable attorneys' fees, resulting from death or bodily injury or damage to real or personal property, to the extent caused by the negligence or misconduct of the indemnifying party, and/or its respective employees or other authorized agents in connection with their activities within the scope of this Agreement. Neither party shall indemnify the other against claims, damages, expenses, or liabilities to the extent attributable to the acts or omissions of the other party or third parties. If the parties are both at fault, the obligation to indemnify shall be proportional to their relative fault. The duty to indemnify and hold harmless will continue in full force and effect, notwithstanding the expiration or early termination of this Agreement, with respect to any claims based on facts or conditions that occurred prior to expiration or termination of this Agreement.

**12. Limitation of Liability.** NOTWITHSTANDING ANYTHING TO THE CONTRARY, NEITHER PARTY SHALL BE LIABLE FOR SPECIAL, INCIDENTAL, INDIRECT, OR CONSEQUENTIAL LOSSES OR DAMAGES OF ANY KIND (INCLUDING WITHOUT LIMITATION REFRIGERANT LOSS, PRODUCT LOSS, LOST REVENUE OR PROFITS, OR LIABILITY TO THIRD PARTIES), OR CONTAMINANTS LIABILITIES, OR PUNITIVE DAMAGES WHETHER BASED IN CONTRACT, WARRANTY, STATUTE, TORT (INCLUDING NEGLIGENCE), STRICT LIABILITY, INDEMNITY OR ANY OTHER LEGAL THEORY OR FACTS. NOTWITHSTANDING ANY OTHER PROVISION OF THIS AGREEMENT, THE TOTAL AND AGGREGATE LIABILITY OF THE COMPANY TO THE CUSTOMER WITH RESPECT TO ANY AND ALL CLAIMS CONNECTED WITH, RELATED TO OR ARISING FROM THE PERFORMANCE OR NON-PERFORMANCE OF THIS AGREEMENT, WHETHER BASED IN CONTRACT, WARRANTY, STATUTE, TORT (INCLUDING NEGLIGENCE), STRICT LIABILITY, INDEMNITY OR ANY OTHER LEGAL THEORY OR FACTS, SHALL NOT EXCEED THE COMPENSATION RECEIVED BY COMPANY OVER THE 12 MONTH PERIOD PRECEDING THE DATE OF OCCURRENCE FOR THE SERVICES AND ADDITIONAL WORK FOR THE LOCATION WHERE THE LOSS OCCURRED. IN NO EVENT SHALL COMPANY BE LIABLE FOR ANY DAMAGES (WHETHER DIRECT OR INDIRECT) RESULTING FROM MOLD/MOULD, FUNGUS, BACTERIA, MICROBIAL GROWTH, OR OTHER CONTAMINATES OR AIRBORNE BIOLOGICAL AGENTS. TO THE MAXIMUM EXTENT ALLOWED BY LAW, COMPANY SHALL NOT BE LIABLE FOR ANY OF THE FOLLOWING IN CONNECTION WITH PROVIDING TRANE DIGITAL SERVICES: INTERRUPTION, DELETION, DEFECT, DELAY IN OPERATION OR TRANSMISSION; CUSTOMER'S NETWORK SECURITY; COMPUTER VIRUS; COMMUNICATION FAILURE; THEFT OR DESTRUCTION OF DATA; GAPS IN DATA COLLECTED; AND UNAUTHORIZED ACCESS TO CUSTOMER'S DATA OR COMMUNICATIONS NETWORK.

### **13. CONTAMINANTS LIABILITY**

The transmission of COVID-19 may occur in a variety of ways and circumstances, many of the aspects of which are currently not known. HVAC systems, products, services and other offerings have not been tested for their effectiveness in reducing the spread of COVID-19, including through the air in closed environments. **IN NO EVENT WILL COMPANY BE LIABLE UNDER THIS AGREEMENT OR OTHERWISE FOR ANY INDEMNIFICATION, ACTION OR CLAIM, WHETHER BASED ON WARRANTY, CONTRACT, TORT OR OTHERWISE, FOR ANY BODILY INJURY (INCLUDING DEATH) DAMAGE TO PROPERTY, OR ANY OTHER LIABILITIES, DAMAGES OR COSTS RELATED TO CONTAMINANTS (INCLUDING THE SPREAD, TRANSMISSION OR CONTAMINATION THEREOF) (COLLECTIVELY, "CONTAMINANTS LIABILITIES") AND CUSTOMER HEREBY EXPRESSLY RELEASES COMPANY FROM ANY SUCH CONTAMINANTS LIABILITIES.**

**14. Asbestos and Hazardous Materials.** The Services expressly exclude any identification, abatement, cleanup, control, disposal, removal or other work connected with asbestos polychlorinated biphenyl ("PCB"), or other hazardous materials (collectively, "Hazardous Materials"). Customer warrants and represents that there are no Hazardous Materials on the premises that will in any way affect Company's performance, except as set forth in a writing signed by Company disclosing the existence and location of any Hazardous Materials in all areas within which Company will be performing. Should Company become aware of or suspect the presence of Hazardous Materials, Company may immediately stop work in the affected area and notify Customer. Customer will be responsible for correcting the condition in accordance with all applicable laws and regulations. Customer shall be exclusively responsible for and shall indemnify and hold harmless Company (including its employees, agents and subcontractors) from and against any loss, claim, liability, fees, penalties, injury (including death) or liability of any nature, and the payment thereof, arising out of or relating to any Hazardous Materials on or about the premises, not brought onto the premises by Company. Company shall be required to resume performance only in the absence of Hazardous Materials or when the affected area has been rendered harmless. In no event shall Company be obligated to transport or handle Hazardous Materials, provide any notices to any governmental agency, or examine the premises site for the presence of Hazardous Materials.



**15. Insurance.** Company agrees to maintain the following insurance during the term of this Agreement with limits not less than shown below and will, upon request from Customer, provide a Certificate of evidencing the following coverage:

Commercial General Liability	\$2,000,000 per occurrence
Automobile Liability	\$2,000,000 CSL
Workers Compensation	Statutory Limits

If Customer has requested to be named as an additional insured under Company's insurance policy, Company will do so but only subject to Company's manuscript additional insured endorsement under its primary Commercial General Liability policies. In no event does Company or its insurer waive rights of subrogation.

**16. Force Majeure.** Company's duty to perform under this Agreement is contingent upon the non-occurrence of an Event of Force Majeure. If Company is unable to carry out any material obligation under this Agreement due to an Event of Force Majeure, this Agreement shall at Company's election (i) remain in effect but Company's obligations shall be suspended until the uncontrollable event terminates or (ii) be terminated upon 10 days' notice to Customer, in which event Customer shall pay Company for all parts of the Services furnished to the date of termination. An "Event of Force Majeure" shall mean any cause or event beyond the control of Company. Without limiting the foregoing, "Event of Force Majeure" includes: acts of God; acts of terrorism, war or the public enemy; flood; earthquake; lightning; tornado; storm; fire; civil disobedience; pandemic; insurrections; riots; labor/labour disputes; labor/labour or material shortages from the usual sources of supply; sabotage; restraint by court order or public authority (whether valid or invalid), and action or non-action by or inability to obtain or keep in force the necessary governmental authorizations, permits, licenses, certificates or approvals if not caused by Company; and the requirements of any applicable government in any manner that diverts either the material or the finished product to the direct or indirect benefit of the government.

**17. Maintenance Services Other Than Solely Scheduled Service.** If Company's Maintenance Services hereunder are not limited solely to Scheduled Service, the following provisions shall also apply: (a) Required restoration shall be performed by Customer at its cost prior to Company being obligated to perform hereunder; (b) any changes, adjustments, service or repairs made to the Equipment by any party other than Company, unless approved by Company in writing, may, at Company's option, terminate Company's obligation to render further service to the Equipment so affected; in such case no refund of any portion of the Service Fees shall be made; and (c) Customer shall (i) promptly notify Company of any unusual performance of Equipment; (ii) permit only Company personnel to repair or adjust Equipment and/or controls during the Term or a Renewal Term; and (iii) utilize qualified personnel to properly operate the Equipment in accordance with the applicable operating manuals and recommended procedures.

**18. General.** Except as provided below, to the maximum extent provided by law, this Agreement is made and shall be interpreted and enforced in accordance with the laws of the state or province in which Company performs the Services. Any dispute arising under or relating to this Agreement shall be decided by litigation in a court of competent jurisdiction located in the state or province in which the Services are performed. To the extent the premises are owned and/or operated by any agency of the United States Federal Government, determination of any substantive issue of law shall be according to the United States Federal common law of Government contracts as enunciated and applied by United States Federal judicial bodies and boards of contract appeals of the United States Federal Government. This Agreement contains all of the agreements, representations and understandings of the parties and supersedes all previous understandings, commitments or agreements, oral or written, related to the Services. If any term or condition of this Agreement is invalid, illegal or incapable of being enforced by any rule of law, all other Terms of this Agreement will nevertheless remain in full force and effect as long as the economic or legal substance of the transaction contemplated hereby is not affected in a manner adverse to any party hereto. Customer may not assign, transfer, or convey this Agreement, or any part hereof, without the written consent of Company. Subject to the foregoing, this Agreement shall bind and inure to the benefit of the parties hereto and their permitted successors and assigns. This Agreement may be executed in several counterparts, each of which when executed shall be deemed to be an original, but all together shall constitute but one and the same Agreement. A fully executed facsimile copy hereof or the several counterparts shall suffice as an original. Customer may not assign, transfer, or convey this Agreement, or any part hereof, or its right, title or interest herein, without the written consent of Company. Subject to the foregoing, this Agreement shall be binding upon and inure to the benefit of the parties' respective successors and assigns. No failure or delay by the Company in enforcing any right or exercising any remedy under this Agreement shall be deemed to be a waiver by the Company of any right or remedy.

**19. Federal Requirements.** The Parties shall comply with all United States federal labor law obligations under 29 CFR part 471, appendix A to subpart A. THE FOLLOWING PROVISIONS ARE INCORPORATED HEREIN BY REFERENCE: Executive Order 11701 and 41 CFR §§ 60-250.5(a), 60-300.5; Executive Order 11758 and 41 CFR § 60-741.5(a); U.S. immigration laws, including the L-1 Visa Reform Act of 2004 and the H-1B Visa Reform Act of 2004; and Executive Order 13496. The Parties shall abide by the requirements of 41 CFR 60-300.5(a) and 60-741.5(a). These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to protected veteran status or disability. The Parties certify that they do not operate any programs promoting DEI that violate any applicable United States anti-discrimination laws and acknowledge and agree that their compliance with all applicable federal anti-discrimination laws is material to the federal government's payment decisions. The Parties acknowledge and agree that their employment, procurement, and contracting practices shall not consider race, color, sex, sexual preference, religion, or national origin in ways that violate United States federal civil rights laws.

**20. Export Laws.** The obligation of Company to supply Equipment and/or Services under this Agreement is subject to the ability of Company to supply such items consistent with applicable laws and regulations of the United States and other governments. Company reserves the right to refuse to enter into or perform any order, and to cancel any order, under this Agreement if Company in its sole discretion determines that performance of the transaction to which such order relates would violate any such applicable law or regulation. Customer will pay all handling and other similar costs from Company's factories including the costs of freight, insurance, export clearances, import duties and taxes. Customer will be "exporter of record" with respect to any export from the United States of America and will perform all compliance and logistics functions in connection therewith and will also comply with all applicable laws, rules and regulations. Customer understands that Company and/or the Equipment and/or Services are subject to laws and regulations of the United States of America which may require licensing or authorization for and/or prohibit export, re-export or diversion of Company's Equipment and/or Services to certain countries, and agrees it will not knowingly assist or participate in any such diversion or other violation of applicable United States of America laws and regulations. Customer agrees to hold harmless and indemnify Company for any damages resulting to Customer or Company from a breach of this paragraph by Customer.

**21. U.S. Government Services.** The following provision applies only to direct sales by Company to the US Government. The Parties acknowledge that all items or services ordered and delivered under this Agreement are Commercial Items as defined under Part 12 of the Federal Acquisition Regulation (FAR). In particular, Company agrees to be bound only by those Federal contracting clauses that apply to "commercial" suppliers and that are contained in FAR 52.212-5(e)(1). Company complies with 52.219-8 or 52.219-9 in its service and installation contracting business. The following provision applies only to indirect sales by Company to the US Government. As a Commercial Item Subcontractor, Company accepts only the following mandatory flow down provisions: 52.219-8; 52.222-26; 52.222-35; 52.222-36; 52.222-39; 52.247-64. If the Services are in connection with a U.S. Government contract, Customer certifies that it has provided and will provide current, accurate, and complete information, representations, and certifications to all government officials, including but not limited to the contracting officer and officials of the Small Business Administration, on all matters related to the prime contract, including but not limited to all aspects of its ownership, eligibility, and performance. Anything herein notwithstanding, Company will have no obligations to Customer unless and until Customer provides Company with a true, correct and complete executed copy of the prime contract. Upon request, Customer will provide copies to Company of all requested written communications with any government official related to the prime contract prior to or concurrent with the execution thereof, including but not limited to any communications related to Customer's ownership, eligibility, or performance of the prime contract. Customer will obtain written authorization and approval from Company prior to providing any government official any information about Company's performance of the Services that are the subject of the Proposal or this Agreement, other than the Proposal or this Agreement.

**22. Limited Waiver of Sovereign Immunity.** If Customer is an Indian tribe (in the U.S.) or a First Nation or Band Council (in Canada), Customer, whether acting in its capacity as a government, governmental entity, a duly organized corporate entity or otherwise, for itself and for its agents, successors, and assigns: (1) hereby provides this limited waiver of its sovereign immunity as to any damages, claims, lawsuit, or cause of action (herein "Action") brought against Customer by Company and arising or alleged to arise out of the furnishing by Company of any product or service under this Agreement, whether such Action is based in contract, tort, strict liability, civil liability or any other legal theory; (2) agrees that jurisdiction and venue for any such Action shall be proper and valid (a) if Customer is in the U.S., in any state or United States court located in the state in which Company is performing this Agreement or (b) if Customer is in Canada, in the superior court of the province or territory in which the work was performed; (3) expressly consents to such Action, and waives any objection to jurisdiction or venue; (4)





waives any requirement of exhaustion of tribal court or administrative remedies for any Action arising out of or related to this Agreement; and (5) expressly acknowledges and agrees that Company is not subject to the jurisdiction of Customer's tribal court or any similar tribal forum, that Customer will not bring any action against Company in tribal court, and that Customer will not avail itself of any ruling or direction of the tribal court permitting or directing it to suspend its payment or other obligations under this Agreement. The individual signing on behalf of Customer warrants and represents that such individual is duly authorized to provide this waiver and enter into this Agreement and that this Agreement constitutes the valid and legally binding obligation of Customer, enforceable in accordance with its terms.

1-26.130-7 (0325)

Supersedes 1-26.130-7 (0225)



## SECURITY ADDENDUM

This Addendum shall be applicable to the sale, installation and use of Trane equipment and the sale and provision of Trane services. "Trane" shall mean Trane U.S. Inc. for sales and services in the United States, or Trane Canada ULC for sales and services in Canada.

1. **Definitions.** All terms used in this Addendum shall have the meaning specified in the Agreement unless otherwise defined herein. For the purposes of this Addendum, the following terms are defined as follows:

"Customer Data" means Customer account information as related to the Services only and does not include HVAC Machine Data or personal data. Trane does not require, nor shall Customer provide personal data to Trane under the Agreement. Such data is not required for Trane to provide its Equipment and/or Services to the Customer.

"Equipment" shall have the meaning set forth in the Agreement.

"HVAC Machine Data" means data generated and collected from the product or furnished service without manual entry. HVAC Machine Data is data relating to the physical measurements and operating conditions of a HVAC system, such as but not limited to, temperatures, humidity, pressure, HVAC equipment status. HVAC Machine Data does not include Personal Data and, for the purposes of this agreement, the names of users of Trane's controls products or hosted applications shall not be Personal Data, if any such user chooses to use his/her name(s) in the created accounts within the controls product (e.g., firstname.lastname@address.com). HVAC Machine Data may be used by Trane: (a) to provide better support services and/or products to users of its products and services; (b) to assess compliance with Trane terms and conditions; (c) for statistical or other analysis of the collective characteristics and behaviors of product and services users; (d) to backup user and other data or information and/or provide remote support and/or restoration; (e) to provide or undertake: engineering analysis; failure analysis; warranty analysis; energy analysis; predictive analysis; service analysis; product usage analysis; and/or other desirable analysis, including, but not limited to, histories or trends of any of the foregoing; and (f) to otherwise understand and respond to the needs of users of the product or furnished service. "Personal Data" means data and/or information that is owned or controlled by Customer, and that names or identifies, or is about a natural person, such as: (i) data that is explicitly defined as a regulated category of data under any data privacy laws applicable to Customer; (ii) non-public personal information ("NPI") or personal information ("PI"), such as national identification number, passport number, social security number, social insurance number, or driver's license number; (iii) health or medical information, such as insurance information, medical prognosis, diagnosis information, or genetic information; (iv) financial information, such as a policy number, credit card number, and/or bank account number; (v) personally identifying technical information (whether transmitted or stored in cookies, devices, or otherwise), such as IP address, MAC address, device identifier, International Mobile Equipment Identifier ("IMEI"), or advertising identifier; (vi) biometric information; and/or (vii) sensitive personal data, such as, race, religion, marital status, disability, gender, sexual orientation, geolocation, or mother's maiden name.

"Security Incident" shall refer to (i) a compromise of any network, system, application or data in which Customer Data has been accessed or acquired by an unauthorized third party; (ii) any situation where Trane reasonably suspects that such compromise may have occurred; or (iii) any actual or reasonably suspected unauthorized or illegal Processing, loss, use, disclosure or acquisition of or access to any Customer Data.

"Services" shall have the meaning set forth in the Agreement.

2. **HVAC Machine Data; Access to Customer Extranet and Third Party Systems.** If Customer grants Trane access to HVAC Machine Data via web portals or other non-public websites or extranet services on Customer's or a third party's website or system (each, an "Extranet"), Trane will comply with the following:
  - a. **Accounts.** Trane will ensure that Trane's personnel use only the Extranet account(s) designated by Customer and will require Trane personnel to keep their access credentials confidential.
  - b. **Systems.** Trane will access the Extranet only through computing or processing systems or applications running operating systems managed by Trane that include: (i) system network firewalls; (ii) centralized patch management; (iii) operating system appropriate anti-malware software; and (iv) for portable devices, full disk encryption.
  - c. **Restrictions.** Unless otherwise approved by Customer in writing, Trane will not download, mirror or permanently store any HVAC Machine Data from any Extranet on any medium, including any machines, devices or servers.
  - d. **Account Termination.** Trane will terminate the account of each of Trane's personnel in accordance with Trane's standard practices after any specific Trane personnel who has been authorized to access any Extranet (1) no



longer needs access to HVAC Machine Data or (2) no longer qualifies as Trane personnel (e.g., the individual leaves Trane's employment).

- e. Third Party Systems. Trane will provide Customer prior notice before it uses any third party system that stores or may otherwise have access to HVAC Machine Data, unless (1) the data is encrypted and (2) the third party system will not have access to the decryption key or unencrypted "plain text" versions of the HVAC Machine Data.

3. Customer Data: Confidentiality. Trane shall keep confidential, and shall not access or use any Customer Data and information that is marked confidential or by its nature is considered confidential ("Customer Confidential Information") other than for the purpose of providing the Equipment and Services, and will disclose Customer Confidential Information only: (i) to Trane's employees and agents who have a need to know to perform the Services, (ii) as expressly permitted or instructed by Customer, or (iii) to the minimum extent required to comply with applicable law, provided that Trane (1) provides Customer with prompt written notice prior to any such disclosure, and (2) reasonably cooperate with Customer to limit or prevent such disclosure.
4. Customer Data: Compliance with Laws. Trane agrees to comply with laws, regulations governmental requirements and industry standards and practices relating to Trane's processing of Customer Confidential Information (collectively, "**Laws**").
5. Customer Data: Information Security Management. Trane agrees to establish and maintain an information security and privacy program, consistent with applicable HVAC equipment industry practices that complies with this Addendum and applicable Laws ("**Information Security Program**"). The Information Security Program shall include appropriate physical, technical and administrative safeguards, including any safeguards and controls agreed by the Parties in writing, sufficient to protect Customer systems, and Customer's Confidential Information from unauthorized access, destruction, use, modification or disclosure. The Information Security Program shall include appropriate, ongoing training and awareness programs designed to ensure that Trane's employees and agents, and others acting on Trane's, behalf are aware of and comply with the Information Security Program's policies, procedures, and protocols.
6. Monitoring. Trane shall monitor and, at regular intervals consistent with HVAC equipment industry practices, test and evaluate the effectiveness of its Information Security Program. Trane shall evaluate and promptly adjust its Information Security Program in light of the results of the testing and monitoring, any material changes to its operations or business arrangements, or any other facts or circumstances that Trane knows or reasonably should know may have a material impact on the security of Customer Confidential Information, Customer systems and Customer property.
7. Audits. Customer acknowledges and agrees that the Trane SOC2 audit report will be used to satisfy any and all audit/inspection requests/requirements by or on behalf of Customer. Trane will make its SOC2 audit report available to Customer upon request and with a signed nondisclosure agreement.
8. Information Security Contact. Trane's information security contact is Local Sales Office.
9. Security Incident Management. Trane shall notify Customer after the confirmation of a Security Incident that affects Customer Confidential Information, Customer systems and Customer property. The written notice shall summarize the nature and scope of the Security Incident and the corrective action already taken or planned.
10. Threat and Vulnerability Management. Trane regularly performs vulnerability scans and addresses detected vulnerabilities on a risk basis. Periodically, Trane engages third-parties to perform network vulnerability assessments and penetration testing. Vulnerabilities will be reported in accordance with Trane's cybersecurity vulnerability reported process. Trane periodically provides security updates and software upgrades.
11. Security Training and Awareness. New employees are required to complete security training as part of the new hire process and receive annual and targeted training (as needed and appropriate to their role) thereafter to help maintain compliance with Security Policies, as well as other corporate policies, such as the Trane Code of Conduct. This includes requiring Trane employees to annually re-acknowledge the Code of Conduct and other Trane policies as appropriate. Trane conducts periodic security awareness campaigns to educate personnel about their responsibilities and provide guidance to create and maintain a secure workplace.
12. Secure Disposal Policies. Trane will maintain policies, processes, and procedures regarding the disposal of tangible and intangible property containing Customer Confidential Information so that wherever possible, Customer Confidential Information cannot be practicably read or reconstructed.



13. Logical Access Controls. Trane employs internal monitoring and logging technology to help detect and prevent unauthorized access attempts to Trane's corporate networks and production systems. Trane's monitoring includes a review of changes affecting systems' handling authentication, authorization, and auditing, and privileged access to Trane production systems. Trane uses the principle of "least privilege" (meaning access denied unless specifically granted) for access to customer data.
14. Contingency Planning/Disaster Recovery. Trane will implement policies and procedures required to respond to an emergency or other occurrence (i.e. fire, vandalism, system failure, natural disaster) that could damage Customer Data or any system that contains Customer Data. Procedures include the following
  - (i) Data backups; and
  - (ii) Formal disaster recovery plan. Such disaster recovery plan is tested at least annually.
15. Return of Customer Data. If Trane is responsible for storing or receiving Customer Data, Trane shall, at Customer's sole discretion, deliver Customer Data to Customer in its preferred format within a commercially reasonable period of time following the expiration or earlier termination of the Agreement or, such earlier time as Customer requests, securely destroy or render unreadable or undecipherable each and every original and copy in every media of all Customer's Data in Trane's possession, custody or control no later than [90 days] after receipt of Customer's written instructions directing Trane to delete the Customer Data.
16. Background Checks Trane shall take reasonable steps to ensure the reliability of its employees or other personnel having access to the Customer Data, including the conducting of appropriate background and/or verification checks in accordance with Trane policies.
17. DISCLAIMER OF WARRANTIES. EXCEPT FOR ANY APPLICABLE WARRANTIES IN THE AGREEMENT, THE SERVICES ARE PROVIDED "AS IS", WITH ALL FAULTS, AND THE ENTIRE RISK AS TO SATISFACTORY QUALITY, PERFORMANCE, ACCURACY AND EFFORT AS TO SUCH SERVICES SHALL BE WITH CUSTOMER. TRANE DISCLAIMS ANY AND ALL OTHER EXPRESS OR IMPLIED REPRESENTATIONS AND WARRANTIES WITH RESPECT TO THE SERVICES AND THE SERVICES PROVIDED HEREUNDER, INCLUDING ANY EXPRESS OR IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR THAT THE SERVICES WILL OPERATE ERROR-FREE OR UNINTERRUPTED OR RETURN/RESPONSE TO INQUIRIES WITHIN ANY SPECIFIC PERIOD OF TIME.

October 2024  
Supersedes: November 2023v2





## APPENDIX

### SAFETY

Since 2003, U.S. Bureau of Labor Statistics records have consistently shown the Total Recordable Incident Rate (TRIR) and Days Away From Work (DAFW) for Trane have been significantly lower than those for HVAC repair and maintenance contractors and specialty trade contractors (construction). The company's safety culture in America is unparalleled in the building service industry, with proven results in the continuous reduction of injury rates. Trane incident rates (OSHA) are consistently 50 to 70 percent below the industry average.

A wide range of safety training and resources are available to Trane technicians, including:

- Safety training—20 hours per year
- Electrical safety—NFPA 70E compliant, electrical PPE
- Fall protection
- Ergonomics
- USDOT compliance
- Refrigerant management training

### ENVIRONMENTAL PRACTICES

Trane policies and procedures are compliant with all federal and state regulations. Refrigerant (and substitutes) handling, storage and leak repair processes are compliant with Environmental Protection Agency regulation 40 CFR Part 82. Service technicians are Universal-certified and use only certified recovery equipment.

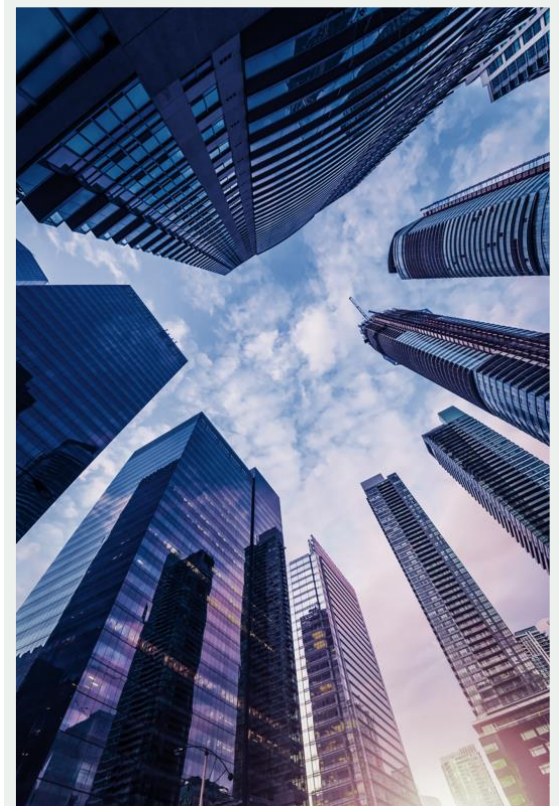
Refrigerant Management Software (RMS) captures, manages and reports all refrigerant activity at your site. Upon request, Trane can send you an annual report documenting all refrigerant activity that we performed for each piece of equipment during the past 12 months.

Trane adheres to all environmental regulations when removing used oil from refrigeration units.

### CONSISTENCY

Nationwide, Trane technicians follow documented, formal processes that ensure uniform service delivery. As an OEM, Trane has developed exclusive service procedures which provide the most reliable outcomes, and extended equipment longevity, at the most cost-effective price.

- Exclusive service work flow processes provide detailed steps and information encompassing parts, materials, tools and sequence of execution
- Additional steps addressing safety, quality control, work validation and environmental compliance
- Technicians must consistently reference documented processes to ensure no critical steps are skipped or omitted
- Applicable service processes meet or exceed ASHRAE 180-2008 Standard Practice for Inspection and Maintenance of Commercial Building HVAC Systems







## CUSTOMER SERVICE FLOWS

The following Customer Service Flows provide additional service description detail for Covered Equipment. Note: There may be differences per the agreement in the work being performed between sites and the equipment on those sites. This section clarifies differences in the work being performed between sites and the equipment on those sites:

### Service 1: Connected Controls - Annual Inspection - Onsite

#### Description

- Technician Check In - Technician checks in with customer to discuss scope of work for that day and any customer concerns or information.
- Update SC/SC+ Firmware - Technician updates firmware and Software Maintenance Plan license for the system controller.
- Perform Database and Graphics Back Up - Technician backs up system controller, including any custom graphics packages on site.
- Hardening Report - Technician runs cybersecurity hardening report for the system controller(s).
- Alarm Routing - Technician checks that existing alarm routing configuration is correct and that alarms are routing to correct people within organization as appropriate.
- Device Communication Check - Technician checks device communication links, analyzes for communication failures or intermittent communication, and captures current state.
- User Access Review - Technician reviews list of users with access to the BAS/BMS/Trane Connect and captures current state.
- User Override Report - Technician runs a user override report to determine what overrides are currently in place for the system.
- Building Schedule and Area Review - Technician reviews current building schedules and captures current state.
- Alarm Log Review - Technician reviews alarm log and captures current status.
- Graphics Interface Review - Technician reviews any custom system and equipment graphics within the system to determine if they are up to date and captures the status.
- Building Analytics - Technician reviews building analytics to ensure design operation of systems and identify any operational anomalies based on what analytics are reporting.
- Service Advisories - Technician runs Exception History Report and documents their findings.
- Additional Item Identification - Technician identifies items that require further investigation and provides quotes as needed.
- Document Findings in Trane Connect - Technician captures any findings and uploads into Trane Connect for customer visibility.
- Finalize Field Report - Technician documents work in customer field report.
- Checkout with Customer - Technician discusses work with customer and discusses any next steps that they recommend.

### Service 2: Connected Controls - Operating Inspection - Onsite

#### Description

- Technician Check In - Technician checks in with customer to discuss scope of work for that day and any customer concerns or information.
- Hardening Report - Technician runs cybersecurity hardening report for the system controller(s).
- Alarm Routing - Technician checks that existing alarm routing configuration is correct and that alarms are routing to correct people within organization as appropriate.
- Device Communication Check - Technician checks device communication links, analyzes for communication failures or intermittent communication, and captures current state.
- User Access Review - Technician reviews list of users with access to the BAS/BMS/Trane Connect and captures current state.
- User Override Report - Technician runs a user override report to determine what overrides are currently in place for the system.
- Building Schedule and Area Review - Technician reviews current building schedules and captures current state.
- Alarm Log Review - Technician reviews alarm log and captures current status.
- Building Analytics - Technician reviews building analytics to ensure design operation of systems and identify any operational anomalies based on what analytics are reporting.
- Service Advisories - Technician runs Exception History Report and documents their findings.
- Additional Item Identification - Technician identifies items that require further investigation and provides quotes as needed.



- Document Findings in Trane Connect - Technician captures any findings and uploads into Trane Connect for customer visibility.
- Finalize Field Report - Technician documents work in customer field report.
- Checkout with Customer - Technician discusses work with customer and discusses any next steps that they recommend.

### **Service 3: Connected Controls - Operating Inspection - Remote**

#### **Description**

- Technician Check In - Technician checks in with customer to discuss scope of work for that day and any customer concerns or information.
- Hardening Report - Technician runs cybersecurity hardening report for the system controller(s).
- Alarm Routing - Technician checks that existing alarm routing configuration is correct and that alarms are routing to correct people within organization as appropriate.
- Device Communication Check - Technician checks device communication links, analyzes for communication failures or intermittent communication, and captures current state.
- User Access Review - Technician reviews list of users with access to the BAS/BMS/Trane Connect and captures current state.
- User Override Report - Technician runs a user override report to determine what overrides are currently in place for the system.
- Building Schedule and Area Review - Technician reviews current building schedules and captures current state.
- Alarm Log Review - Technician reviews alarm log and captures current status.
- Building Analytics - Technician reviews building analytics to ensure design operation of systems and identify any operational anomalies based on what analytics are reporting.
- Service Advisories - Technician runs Exception History Report and documents their findings.
- Additional Item Identification - Technician identifies items that require further investigation and provides quotes as needed.
- Document Findings in Trane Connect - Technician captures any findings and uploads into Trane Connect for customer visibility.
- Finalize Field Report - Technician documents work in customer field report.
- Checkout with Customer - Technician discusses work with customer and discusses any next steps that they recommend.

### **Service 4: Analyzation of System Applications**

#### **Description**

- AHU/VAS - Review cloud hosted analytics to ensure the proper operation of the Variable Air System and associated Air Handling Unit. Verify operating setpoints and associated parameters to ensure performance and efficiency.

### **Service 5: Analyzation of System Applications**

#### **Description**

- AHU/VAS - Review cloud hosted analytics to ensure the proper operation of the Variable Air System and associated Air Handling Unit. Verify operating setpoints and associated parameters to ensure performance and efficiency.

### **Service 6: CMSA RTU NTP\_RT Onsite Connected Inspection - Additional Connected for Site**

#### **Description**

- Run and Review Performance Report
- Review Analytics
- Review Performance Charts
- Upload Report and Charts in XO

### **Service 7: MiniSplit IDU Clean Air Filter**

#### **Description**

- Clean Air Filter

### **Service 8: MiniSplit Operational Inspection**

#### **Description**

- Unitary Visual Equipment Inspection
- Condenser Coil Check
- Electrical Inspection



- Check Delta T

#### **Service 9: Commercial Package Rooftop (Greater than 10 tons) Cooling Pre-Season Annual Maintenance**

##### Description

- Unitary Visual Equipment Inspection
- Supply Fan and Motor Inspection (Belt Driven)
- Condensate Drip Pan Inspection and Treatment
- Check Damper (Commercial Rooftop)
- Electrical Inspection (Commercial Over 10 Tons Rooftop)
- Log Unit (Cooling)

#### **Service 10: Commercial Package Rooftop (Greater than 10 tons) Heating Pre-Season Annual Maintenance**

##### Description

- Unitary Visual Equipment Inspection
- Supply Fan and Motor Inspection (Belt Driven)
- Check Damper (Commercial Rooftop)
- Heating Inspection (Gas)
- Log Unit (Heating)

#### **Service 11: Commercial Package Rooftop (Greater than 10 tons) Quarterly Maintenance**

##### Description

- Unitary Visual Equipment Inspection
- Check Damper (Commercial Rooftop)
- Electrical Inspection (Commercial Over 10 Tons Rooftop)
- Check Delta T

#### **Service 12: NTP MiniSplit Heat Pump Condenser Coil Cleaning**

##### Description

- Condenser Coil Cleaning

#### **Service 13: NTP MiniSplit Heat Pump Condenser Cooling Annual Inspection**

##### Description

- Customer Notification of Unit Maintenance
- Initial Site Inspection
- Review Diagnostics (Standard)
- Lock Out Tag Out (Standard)
- Check Electrical Connections (Outdoor Unit)
- Remove Lock Out Tag Out
- Start Up Seasonal Cooling
- Check Amp Draw
- Return Unit to Normal Operation

#### **Service 14: NTP MiniSplit Heat Pump Condenser Heating Annual Inspection**

##### Description

- Customer Notification of Unit Maintenance
- Initial Site Inspection
- Review Diagnostics (Standard)
- Lock Out Tag Out (Standard)
- Check Electrical Connections (Outdoor Unit)
- Remove Lock Out Tag Out
- Start Up Seasonal Heating (Heat Pump)
- Check Amp Draw
- Return Unit to Normal Operation

#### **Service 15: Rooftop NTP\_RT Condenser Coil Cleaning**

##### Description

- Clean condenser coil

#### **Service 16: Rooftop Unit belt change**



Description

- Change V-belt

**Service 17: Rooftop Unit Filter replacement**

Description

- Filter Inspection and Change