

# Regular Board of Education Meeting

September 23, 2024 5:00 PM

Robert J. Smallridge School Administration Building

## I. Call to Order

## II. Pledge of Allegiance and Presentation of Colors

## III. School Program by Woodland Elementary School

## IV. Approval of Agenda

## V. Special Reports/Presentations

A. Good News

## VI. Public Forum

## VII. Consent Agenda

A. Board Minutes 08-26-24

B. RMS Annual Historic Triangle Field Trip to Williamsburg, VA

C. ORHS Cheerleading Team Field Trip to Orlando, FL

D. ORHS Girls Basketball Field Trip to Pensacola, FL

E. ORHS Boys Basketball Field Trip to Franklin, TN

## VIII. Items for Action

A. FY25 Audit Firm Engagement - Internal School Funds

B. FY25 21st Century Community Learning Center (CCLC) Grant

C. FY25 State Special Education Preschool Grant

D. Board Policy 4.600 Grading System - First and Second Reading

E. Purchase of HVAC Equipment

F. ORS Transportation Certification Clearance

## IX. Items for Information

A. Financial Report

B. Enrollment & Attendance Report

## X. Items for Discussion

A. Board Self-Evaluation

## XI. Old Business

## XII. New Business

## XIII. Communications

## XIV. Adjournment



## **Glenwood**

Glenwood PTO hosted a successful fundraiser to kick off the school year, surpassing our goal! Students celebrated this with "Pieing" the principals! It was a delicious success.

A huge thanks to First Student transportation for their partnership in conducting bus safety trainings at Glenwood. Our students are now fully educated on basic bus safety procedures for their daily transportation and field trips.

Glenwood's Vegetable Garden is experiencing its first bounty! Many, many students and teachers have benefited from both the education it has provided and the endless supply of fresh produce. This is only possible because of an ORPSF grant and the extra elbow grease of our students, teachers, and families. We invite all to come and experience this beautiful space.

## **Willow Brook**

The 1st and 2nd grade teams visited the Oak Ridge Playhouse to see *The Velveteen Rabbit*. Our students had a wonderful time watching the play and demonstrated excellent behavior throughout the performance.

Our RoBEARtics Team traveled to Ripley's Aquarium on Sunday, September 8, where they collaborated with their families to brainstorm ideas on using AI to enhance oceanic ecosystems. They also engaged with the aquarium staff to learn about how technological devices support biomimicry engineering.

Congratulations to Ms. Cochran, our WBES Art teacher, for being recognized as the WBIR Educator of the Week! Her passion and dedication to our students are truly commendable!

## **Robertsville**

This past July, Oak Ridge Schools and the Sister City Support Organization were thrilled to be able to send nine middle school ambassadors (7 students and 2 teachers) to our Sister City of Naka shi, Japan. Our Japanese hosts then came here to visit us from August 21st through the 27th. Due to Covid, this was the first time our two great cities have been able to participate in a physical exchange since 2019. On behalf of the Sister City Support Organization and the Oak Ridge City School system, Mr. Sean Seyfert, RMS Art Teacher and Co-Chairman of the SCSO, would like to thank all involved in making this year's exchange a huge success.

# Good News



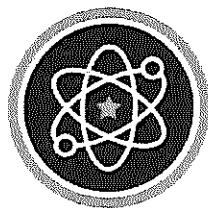
# Sept. 23, 2024

## Oak Ridge High School

Hayden Sauer, a junior at ORHS, achieved 1st place and was awarded the Best in Show/Medal of Honor at the Tennessee Valley Fair for her sculpture "Iphigenia." This honor came with a scholarship of \$1,000.

In addition, six other students were recognized for their achievements: seniors Imre Barna, Kyliegh Langdale, and Acacia Tifft, along with freshmen Gabriella Clafin, Kaitlynn Thomas, and Nora Jackson.

We are also proud to announce our National Merit Semi-Finalists. Congratulations to Bennett Zen, Silas Rodwden, and William Shen.



# Robertsville

## MIDDLE SCHOOL

### Memorandum of Support

**To:** Oak Ridge Schools Board of Education

**From:** Christy Free, RMS Interim Principal

**Date:** August 20, 2024

**Subject:** Support for the Annual Historic Triangle Overnight Field Trip to Williamsburg, VA

I am writing to express my strong support for the annual Historic Triangle Overnight Field Trip to Williamsburg, VA, for students in the 8<sup>th</sup> Grade American History Curriculum. This trip offers invaluable educational experiences that directly align with the curriculum and enhance students' learning outcomes. This year's field trip will take place from Saturday, May 24, 2025 through Monday, May 26, 2025. This trip will not take place on a school day and will be outside of regular school hours. It is not a class requirement nor tied to a grade. Collection of fees for this trip have been approved by the school principal and will be handled through the internal school account.

#### Rationale for Support:

1. **Living History Experience:** Williamsburg, VA, serves as a living history museum, providing students with a unique opportunity to immerse themselves in the colonial era. By witnessing reenactments, exploring historic sites, and engaging with costumed interpreters, students can gain a deeper understanding of the time period they have studied in class.
2. **Connection to Curriculum:** The 8<sup>th</sup> Grade American History Curriculum covers topics such as the colonial life, the American Revolution, and the formation of the United States. Students will visit Jamestown, Williamsburg, and Yorktown, VA, which allows them to see firsthand the places where key events occurred and the daily lives of historical figures, making their learning more tangible and memorable.
3. **Critical Thinking Skills:** The field trip encourages students to think critically about history by analyzing primary sources, interpreting historical events, and making connections between the past and the present. This hands-on experience fosters a deeper appreciation for the complexities of American history.
4. **Cultural Enrichment:** Exposure to different historical perspectives and cultural practices at Williamsburg broadens students' worldview and promotes cultural sensitivity. By interacting with diverse historical narratives, students develop empathy and a more inclusive understanding of American history.

In conclusion, the Historic Triangle Overnight Field Trip to Williamsburg, VA, is an enriching educational opportunity that complements the 8<sup>th</sup> Grade American History Curriculum. I encourage the Board of Education to continue supporting this valuable learning experience for our students.

Respectfully,

  
Christy Free, Interim Principal

**OAK RIDGE SCHOOLS**  
**CAMPUS LEAVE REQUEST – Overnight Trip**

*Accommodations: Overnight lodging for students must be appropriately selected with student safety, quality of accommodations, cost, and location to events as central considerations. Students should be appropriately assigned to rooms and an overnight adult supervision and contact plan should be established and communicated to students.*

School: Robertsville MS Date: 8-19-24

*The following group requests permission to leave the school campus to participate in the educational activity indicated below. Parental permission will be obtained for each student.*

Class/Group Requesting Permission: 8th Grade Social Studies Classes

Educational Activity: 8th Grade End of Year Colonial Triangle Tour

Destination: Jamestown, Williamsburg, Yorktown, VA along with Monticello

Purpose of Trip: Coincides with SS curriculum

Departure Date: 5/24/25 Departure Time: 5:00am

Return Date: 5/26/25 Return Time: 9:30 pm

Mode of Transportation: Motor Coach

First Student Transportation Contractor School System Van Air Travel

NOTE: Only ORS employees are authorized to drive school system vans.

School System Van – Name of Driver: \_\_\_\_\_

Driver's License Verified by: \_\_\_\_\_ Attach copy of driver's license

Transportation Contractor: KTG-Olympus Car and Coach Phone #: 865-523-2796

*(Only approved transportation companies may be used. Refer to ORS website for list of approved companies)*

Air Travel Flight #'s: \_\_\_\_\_

Hotel/Motel Name: Fairfield Inn and Suites-Williamsburg

Address: 1402 Richmond Road

City: Williamsburg State: Va Zip: 23185

Phone: 757-645-3600 Contact Person: Sophia Harler

Number of Nights: 2 Hotel Rating: 4 out of 5 stars

Name of School Sponsor/Date: Rachel Frazier 8/19/24

Signature of School Sponsor: Rachel W. Frazier Cell #: 865-806-4833

*Minimum requires teacher to student ratio:*

*PreK – 3 yr olds 1:4      K-2nd 1:6      3rd-4th 1:10      5th-8th 1:12      9th-12th 1:15*  
*4 yr olds 1:6*

# of Students: 40

# of Adults: 4

Chaperone/Student Ratio: 1:10

**Professional Staff Chaperone(s)**

- 1. Name: Rachel Frazier Cell #: 865-806-4833
- 2. Name: Scott Hinton Cell #: 865-567-0802
- 3. Name: Julie Kinder-McMillan Cell #: 865-919-0569
- 4. Name: Taylor Hill Cell #: 901-517-7060

**Other Chaperone(s):**

- 1. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 2. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 3. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

*Field Trips which exceed \$25,000, involve out of the country travel, out of state travel or overnight stay require School Board approval, regardless of fund raising, Booster Club participation or other contributions. Please follow these guidelines when requesting approval of such trip:*

- 1. Submit an "Item for Action" for the Board Agenda (Principals have directions on submitting Board Agenda items).
- 2. Attach as documentation the following items"
  - Completed Campus Leave Request
  - Details of Trip/Itinerary
  - Justification/Explanation of Cost (per student/chaperone/total)
  - Financial Arrangements for students who cannot afford trip (if any)
  - Insurance Details
  - Out of country travel requires a release for each student participant

**Financial Arrangements: (please indicate method)**

No Cost      Paid by Students      Paid by School      Paid by School System

Substitute Required      Acct to be charged for Substitute \_\_\_\_\_

\$ 630 Per Student      TOTAL TRIP AMOUNT: \$ 25,200

Provisions for those students unable to pay: \_\_\_\_\_ will conduct a fundraiser in late fall/early winter to help offset costs for those that need help to pay.

**Other information, comments, and special arrangements: (foreseeable hazards must be identified)**

Busch Gardens will be part of the itinerary on Day 2. We will spend 4-5 hours there in the evening including dinner.

Staff Member: \_\_\_\_\_

Date: \_\_\_\_\_

Athletic Director: \_\_\_\_\_

Date: \_\_\_\_\_

**This Section for Athletic Trips Only**

At the high school level up to three events and/or tournaments per season can involve an overnight trip. However, no more than one day of school may be missed for these trips. (Under certain conditions, the Superintendent of Schools or designee may approve additional events.? These trips must be paid entirely from funds outside the Oak Ridge High School Athletic Department. TSSAA Tournament games would be an exception to this policy. (All overnight trips involving middle school athletics require Superintendent or designee approval.)

Number of overnight trips (including this request) requested during the current school year: \_\_\_\_\_

Athletic Director Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Principal's Action:      Approved:       Disapproved:

Principal's Signature: CLY Free

Date: 8/22/24

Superintendent or Designee's Action:      Approved:      Disapproved:

Superintendent or Designee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Board Approval Date: \_\_\_\_\_



P.O. Box 502 • Williamsburg VA 23187  
(757) 258-3122 • Fax (757) 258-3665  
1-800-378-1571  
www.colonialconnections.com

Scott Hinton  
Robertsville MS  
245 Robertsville Rd  
Oak Ridge, TN 37830  
(865) 425-9201 ext. 2221  
Cell (865) 567-0802

August 19, 2024

### Contract for Services

Tour Dates: May 24-26, 2025  
Hotel: Fairfield Inn and Suites Williamsburg  
Motor Coach: Olympus Car and Coach (requested Kreis Baldrige)  
56 passenger coach  
Package cost: Package is based on a minimum of 40 paying students:  
Student package is net, per person and based on occupancy:  
Quad Occupancy \$630 Triple Occupancy \$ 655  
Double Occupancy \$699 Single Occupancy \$895 .

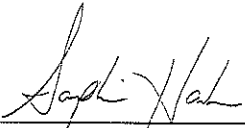
Package inclusions: Round trip motor coach transportation; Two nights lodging; Tour Manager; breakfast each morning; three lunches provided; two dinners provided. Admissions to Colonial Williamsburg, Jamestown Settlement, American Revolution Museum, and Monticello; Busch Gardens; driver and tour manager gratuities, four staff complimentary trips, utilizing 2 rooms.

#### Contractual Dates and Deadlines:

September 10, 2024	Signed contract
January 20, 2025	\$50.00 per person deposit
March 1, 2025	Second deposit of \$100 per person
April 15, 2025	Rooming list due
May 1, 2025	Full and final payment

Cancellations may be made until April 1, 2025 without penalty. Should the 40 minimum paying participants not be secured an increase in cost may be needed to obtain the same itinerary.

Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Colonial Connections:  Date: August 19, 2024  
Sophia Harler

# Robertsville Middle School

Lead teacher:  
Tour Director:  
Coach operator:

## Saturday, May 24, 2025

4:30am Olympus Motorcoach arrives at Robertsville Middle School  
245 Robertsville, Oak Ridge, TN 37830  
4:45am Group reports to school  
5:15am Depart for Williamsburg, VA  
1:30pm Arrival in Jamestown Settlement. Met by Tour Director  
Boxed Lunch provided by Carrot Tree, consumed on site  
2:30pm 2 Hour guided tour of Jamestown Settlement (2 groups)  
4:30pm Restroom and gift shop  
5:00pm Dinner at Jamestown Café / Jamestown Settlement  
6:30pm Check in at hotel: Fairfield Inn and Suites  
1402 Richmond Rd, Williamsburg VA  
Driver must be off duty DOT regulations  
7:00pm Early American Medical program  
Swimming at indoor pool/ no life guard/ swim at own risk  
Chaperones must be present in pool area with students  
9:00pm Private security

## Sunday, May 25

7:30am Deluxe continental breakfast provided  
8:30am Depart for sightseeing  
9:00am Three-hour guided tour of Colonial Williamsburg (2 groups)  
Noon Enjoy shopping and lunch in Merchants Square (\$15 provided p.p.)  
2:00pm Load coach  
2:30pm 2-hour guided tour of The American Revolutionary Museum of Yorktown (2 groups)  
4:30pm Depart for Busch Gardens Williamsburg (**park hours 10am-9pm**)  
Silver meal Certificate provided for dinner in the Park/ suggest everyone eat before 8pm  
Driver will take tour guide back to hotel after dropping group at Busch  
9:00pm Load coach and return to hotel  
10:00pm Private security

## Monday, May 26

6:30am Deluxe continental breakfast provided  
Check out and load coach  
7:30am Depart for Charlottesville, VA  
9:45am Arrival at Monticello, home of Thomas Jefferson  
Take Shuttle to top of the mountain  
Visit grounds  
Take shuttle back to coach  
1:15pm Load coach and depart for Michie tavern  
1:30pm Lunch provided at Michie Tavern  
2:00pm Depart for home  
Dinner On Own (one hour allotted time)  
9:30pm Approximate arrival at Robertsville Middle School

**OAK RIDGE SCHOOLS**  
**CAMPUS LEAVE REQUEST – Overnight Trip**

Accommodations: Overnight lodging for students must be appropriately selected with student safety, quality of accommodations, cost, and location to events as central considerations. Students should be appropriately assigned to rooms and an overnight adult supervision and contact plan should be established and communicated to students.

School: Oak Ridge High School Date: 8-15-24

The following group requests permission to leave the school campus to participate in the educational activity indicated below. Parental permission will be obtained for each student.

Class/Group Requesting Permission: Cheerleading Team

Educational Activity: Senior Varsity Parade

Destination: Disney World

Purpose of Trip: For seniors to participate in the traditional Senior Varsity Parade

Departure Date: 11-21-24 Departure Time: 7am

Return Date: 11-25-24 Return Time: 10pm

Mode of Transportation: Parents are responsible for transporting their kids there. Fly/Drive

First Student  Transportation Contractor  School System Van  Air Travel

NOTE: Only ORS employees are authorized to drive school system vans.

School System Van – Name of Driver: \_\_\_\_\_

Driver's License Verified by: \_\_\_\_\_ Attach copy of driver's license

Transportation Contractor: \_\_\_\_\_ Phone #: \_\_\_\_\_  
(Only approved transportation companies may be used. Refer to ORS website for list of approved companies)

Air Travel Flight #'s: \_\_\_\_\_

Hotel/Motel Name: Coronado Springs Resort

Address: 1001 Lake Buena Vista Drive

City: Orlando State: FL Zip: 32830

Phone: 14079395277 Contact Person: Julie Hutchison

Number of Nights: 4 nights Hotel Rating: 4.5 stars

Name of School Sponsor/Date: Julie Hutchison/11-21-24

Signature of School Sponsor: \_\_\_\_\_ Cell #: 865-742-9825

Minimum requires teacher to student ratio:

PreK – 3 yr olds 1:4      K-2nd 1:6      3rd-4th 1:10      5th-8th 1:12      9th-12th 1:15  
4 yr olds 1:6

# of Students: 7

# of Adults: 8

Chaperone/Student Ratio: 8/7

Professional Staff Chaperone(s)

- 1. Name: Julie Hutchison Cell #: 865-742-9825
- 2. Name: Christy Lamon Cell #: 8656592019
- 3. Name: Zoe Cline Cell #: 8656807689
- 4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

Other Chaperone(s):

- 1. Name: Kristin and Travis Choate Cell #: 865-466-0840
- 2. Name: Tosha Copeland Cell #: 19313164792
- 3. Name: Mike Beal and Sonya Cell #: 8653090897
- 4. Name: Crystal Calder Cell #: 8652274275

Field Trips which exceed \$25,000, involve out of the country travel, out of state travel or overnight stay require School Board approval, regardless of fund raising, Booster Club participation or other contributions. Please follow these guidelines when requesting approval of such trip:

1. Submit an "Item for Action" for the Board Agenda (Principals have directions on submitting Board Agenda items).
2. Attach as documentation the following items"
  - Completed Campus Leave Request
  - Details of Trip/Itinerary
  - Justification/Explanation of Cost (per student/chaperone/total)
  - Financial Arrangements for students who cannot afford trip (if any)
  - Insurance Details
  - Out of country travel requires a release for each student participant

Financial Arrangements: (please indicate method)

No Cost      Paid by Students      Paid by School      Paid by School System

Substitute Required      Acct to be charged for Substitute \_\_\_\_\_

\$ 1078 Per Student      TOTAL TRIP AMOUNT: \$ 11,000.00

Provisions for those students unable to pay: Part is paid by the students and  
part is paid by our boosters.

Other information, comments, and special arrangements: (foreseeable hazards must be identified)

Parents are staying in their own rooms. They will not be staying  
with the athletes.

Staff Member: Julie Hutchison

Date: 8-15-24

Athletic Director: \_\_\_\_\_

Date: \_\_\_\_\_

**This Section for Athletic Trips Only**

At the high school level up to three events and/or tournaments per season can involve an overnight trip. However, no more than one day of school may be missed for these trips. (Under certain conditions, the Superintendent of Schools or designee may approve additional events. These trips must be paid entirely from funds outside the Oak Ridge High School Athletic Department. TSSAA Tournament games would be an exception to this policy. (All overnight trips involving middle school athletics require Superintendent or designee approval.)

Number of overnight trips (Including this request) requested during the current school year: 2

Athletic Director Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Principal's Action: Approved: Disapproved:

Principal's Signature: 

Date: 8-26-24

Superintendent or Designee's Action: Approved: Disapproved:

Superintendent or Designee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Board Approval Date: \_\_\_\_\_

# Disney Varsity Parade

**THURSDAY, NOVEMBER 21, 2024: EARLY ARRIVALS** For those arriving on this day, early on-site registration and optional placement tryout are available at select times throughout the day.

**FRIDAY, NOVEMBER 22, 2024: ARRIVE** in Orlando, Florida! Arrival and Registration at Disney's Coronado Springs Resort  
Hotel Check-In Optional Parade Placement Tryout Mandatory Orientation and Rehearsal

**SATURDAY, NOVEMBER 23, 2024: Rehearsal Day and Team Mickey Performance!** Rehearsal for both Team Mickey and Team Minnie at Disney's Coronado Springs Resort. After rehearsal, Team Mickey will depart the hotel for Magic Kingdom where they will perform. After rehearsal, Team Minnie has a free day to visit the Theme Parks.

**SUNDAY, NOVEMBER 24, 2024: Team Minnie Performance!** Team Minnie will depart Coronado Springs Resort for their performance at Magic Kingdom Team Mickey has a free day to visit the Theme Parks.

**MONDAY, NOVEMBER 25, 2024: Closing Event Breakfast!** Enjoy a breakfast celebration at Disney's Coronado Springs Depart home from Orlando! In order to attend the celebration breakfast, flights should be booked to leave MCO after 12:00PM.

Quad-(4 per room)- \$4180.00 Triple-(3 per room)-\$3366. Coaches-(Triple) \$3246

Total- \$7546 (girls) + \$3246 (coaches) = \$10,792

@ 7 seniors- \$1078.00-\$200 (deposit) = \$878.00

What's included: 3 nights @ Disney Coronado Springs Resorts. 3 Day Park Hopper Tickets. T-Shirt. Uniform(performers). 3 Meal Tickets. Breakfast/Closing on Monday morning

NOT INCLUDED IN COST\*\* FOOD\*\*PLANE TICKET\*\*TRAVEL TO/FROM DISNEY/AIRPORT

\*When making flight reservations we suggest arriving at Coronado Springs Resort no later than 3:30 PM on Friday, November 22nd. If flying, we recommend you land at Orlando International Airport (MCO) by 2:00 PM. You may fly back anytime on Monday, November 25th after 12:00PM.

## Julie Hutchison

---

**From:** Natosha Copeland  
**Sent:** Tuesday, August 20, 2024 7:05 PM  
**To:** Julie Hutchison  
**Subject:** Disney

November 21- 25  
Thurs-Mon  
Staying at Coronado Springs Resort on Disney property  
7 athletes (seniors)  
3 coaches  
All parents attending

Parents are responsible for athletes' transportation to/from Disney

Get [Outlook for iOS](#)

# Disney's Coronado Springs Resort

4.5

[13,352 Google reviews](#)

4-star hotel

[Website](#)

[Directions](#)

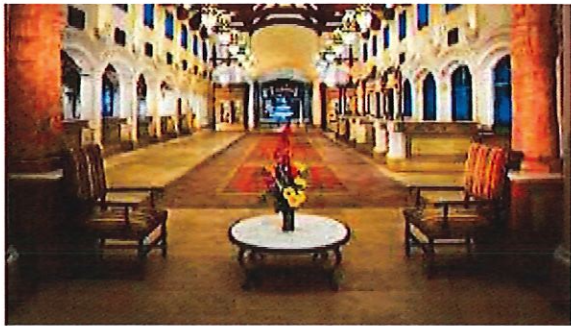
Save

[Call](#)

Check availability

**Address:** 1001 W Buena Vista Dr, Lake Buena Vista, FL 32830

**Phone:** [\(407\) 939-5277](tel:(407)939-5277)



**OAK RIDGE SCHOOLS**  
**CAMPUS LEAVE REQUEST – Overnight Trip**

Accommodations: Overnight lodging for students must be appropriately selected with student safety, quality of accommodations, cost, and location to events as central considerations. Students should be appropriately assigned to rooms and an overnight adult supervision and contact plan should be established and communicated to students.

School: ORHS Date: 8.28.24

The following group requests permission to leave the school campus to participate in the educational activity indicated below. Parental permission will be obtained for each student.

Class/Group Requesting Permission: ORHS Girls Basketball

Educational Activity: Tour local coastland and new geographical features

Destination: Pensacola, Florida

Purpose of Trip: Participate in a Basketball Tournament

Departure Date: 11.23.24 Departure Time: 8 AM

Return Date: 11.26.24 Return Time: 8 PM

Mode of Transportation: School Vans/Rentals

First Student  Transportation Contractor  School System Van  Air Travel

NOTE: Only ORS employees are authorized to drive school system vans.

School System Van – Name of Driver: Paige Taylor

Driver's License Verified by: Beth G. Stip Attach copy of driver's license

Transportation Contractor: Sexton Phone #: \_\_\_\_\_

(Only approved transportation companies may be used. Refer to ORS website for list of approved companies)

Air Travel Flight #'s: \_\_\_\_\_

Hotel/Motel Name: Holiday Inn Resort Pensacola Beach Gulf Front

Address: 14 Via De Luna Drive

City: Pensacola Beach State: FL Zip: 32561

Phone: 850-932-5331 Contact Person: \_\_\_\_\_

Number of Nights: 3 Hotel Rating: 4.5

Name of School Sponsor/Date: Paige Taylor 8.28.24

Signature of School Sponsor: Paige Taylor Cell #: 423.715.6943

Minimum requires teacher to student ratio:

PreK – 3 yr olds 1:4      K-2nd 1:6      3rd-4th 1:10      5th-8th 1:12      9th-12th 1:15  
4 yr olds 1:6

# of Students: 12

# of Adults: 3

Chaperone/Student Ratio: 4:1

Professional Staff Chaperone(s)

- 1. Name: Paige Taylor Cell #: 423.715.6943
- 2. Name: Kristina Sims Cell #: 865.621.9395
- 3. Name: Mykia Dowdell Cell #: 865.360.7890
- 4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

Other Chaperone(s):

- 1. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 2. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 3. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

Field Trips which exceed \$25,000 or involve out of the country travel require School Board approval, regardless of fund raising, Booster Club participation or other contributions. Please follow these guidelines when requesting approval of such trip:

- 1. Submit an "Item for Action" for the Board Agenda (Principals have directions on submitting Board Agenda items).
- 2. Attach as documentation the following items"
  - Completed Campus Leave Request
  - Details of Trip/Itinerary
  - Justification/Explanation of Cost (per student/chaperone/total)
  - Financial Arrangements for students who cannot afford trip (if any)
  - Insurance Details
  - Out of country travel requires a release for each student participant

Financial Arrangements: (please indicate method)

No Cost   
  Paid by Students   
  Paid by School   
  Paid by School System

*Donations*

Substitute Required      Acct to be charged for Substitute 0

\$ \_\_\_\_\_ Per Student      TOTAL TRIP AMOUNT: \$ approx. \$8,000

Provisions for those students unable to pay: \_\_\_\_\_  
The cost of the trip will be paid for by the Girls Basketball Booster Club

Other information, comments, and special arrangements: (foreseeable hazards must be identified)

\_\_\_\_\_  
\_\_\_\_\_

Staff Member: Paige Taylor *Paige Taylor*

Date: 8.28.24

Athletic Director: \_\_\_\_\_

Date: \_\_\_\_\_

**This Section for Athletic Trips Only**

At the high school level up to three events and/or tournaments per season can involve an overnight trip. However, no more than one day of school may be missed for these trips. (Under certain conditions, the Superintendent of Schools or designee may approve additional events.? These trips must be paid entirely from funds outside the Oak Ridge High School Athletic Department. TSSAA Tournament games would be an exception to this policy. (All overnight trips involving middle school athletics require Superintendent or designee approval.)

Number of overnight trips (including this request) requested during the current school year: \_\_\_\_\_

Athletic Director Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Principal's Action:  Approved:  Disapproved:

Principal's Signature: *Beth Gostin*

Date: 8.28.24

Superintendent or Designee's Action: Approved:  Disapproved:

Superintendent or Designee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Board Approval Date (if required): \_\_\_\_\_

***Itinerary Pensacola Basketball Classic***

Pensacola, Florida

*Nov. 25-26, 2024*

**Saturday, November 23<sup>rd</sup>**

8:00am- Depart ORHS for Pensacola, Florida

3:00pm- Arrive at hotel in Pensacola, Florida

6:00-8:00pm- Team Dinner

11:00pm- Lights out

**Sunday, November 24<sup>th</sup>**

9:00-10:00am- Team Breakfast

10:00am-12:30pm- Team Beach Time

12:30-4:30- Leisure time at the hotel

4:30-6:30- Team Practice

7:00-8:00- Team Dinner

11:00pm- Lights out

**Monday, November 25<sup>th</sup>**

9:00-10:00am- Team Breakfast

10:00am-12:30pm- Team Beach Time

12:30-4:30- Leisure time at the hotel

4:30-6:30- Game TBD

7:00-8:00- Team Dinner

11:00pm- Lights out

**Tuesday, November 26<sup>th</sup>**

9:00-10:00am- Team Breakfast

10:00am-12:30pm- Team Beach Time

12:30-4:30- Leisure time at the hotel

4:30-6:30- Game TBD

After game depart for Oak Ridge, TN



Sign In / Join for free



# Holiday Inn Resort Pensacola Beach Gulf Front

NEWLY RENOVATED

★★★★☆ 4.5/5 [4060 Reviews](#)

## Ocean Front Resort on Pensacola Beach, Florida

Our **Holiday Inn Resort Pensacola Beach Gulf Front** hotel is located on the beautiful beaches of Gulf of Mexico, and features 206 guest rooms! We have guest rooms with a **view of the Santa Rosa Sound without a balcony...**

[Read more](#)

### Featured amenities

Kids eat free

Beach

Daily housekeeping

Fitness center

Onsite parking

Pool

1 Onsite restaurant

Smoke free hotel

Wifi

EXPLORE ALL AMENITIES

Feedback

DRIVER LICENSE



*H. Paige Taylor*

DUP  
*Tennessee*  
THE VOLUNTEER STATE

USA  
TN

DL NO. **077881395** DOB **05/02/1977**  
EXP **02/07/2025** ISS **04/28/2020**  
CLASS **D**  
REST **NONE**  
SEX **F** HGT **5-08"** EYES **BRO**  
DD **7202004281028910**

**TAYLOR**  
**HEATHER PAIGE**  
120 MONTANA AVE  
OAK RIDGE, TN 37830-8252



USA  
Tennessee  
THE GREAT SMILE STATE

PL. NO. 097337535  
EXP. 11/07/2031  
CLASS D  
SEX F  
HT 5'-05"  
EYES BRO  
DOB 07/23/1973

01071986  
SS 11072033  
END NONE  
REG 01  
BRO

DRIVER LICENSE

SMITH  
KRISTINA LAUREN  
7607 BAILEY LANDING LN  
KNOXVILLE TN 37951



DRIVER LICENSE



*Mykia Tnea Dowdell*

DUP

USA  
TN

Tennessee

THE VOLUNTEER STATE



DL NO: 126692579      DOB 05/22/2000

EXP 05/24/2029      ISS 04/11/2023

CLASS D      END NONE

REST 01

SEX F HGT 5'-09" EYES BRO

DD 7202304111418387

DOWDELL  
MYKIA TNEA  
206 SWEET GUM LN

OAK RIDGE, TN 37830



DL

**OAK RIDGE SCHOOLS**  
**CAMPUS LEAVE REQUEST – Overnight Trip**

*Accommodations: Overnight lodging for students must be appropriately selected with student safety, quality of accommodations, cost, and location to events as central considerations. Students should be appropriately assigned to rooms and an overnight adult supervision and contact plan should be established and communicated to students.*

School: Oak Ridge High School Date: 9/4/2024

*The following group requests permission to leave the school campus to participate in the educational activity indicated below. Parental permission will be obtained for each student.*

Class/Group Requesting Permission: ORHS Boys Basketball

Educational Activity: local history and sports analysis

Destination: Franklin, TN

Purpose of Trip: Basketball Tournament

Departure Date: 12/27/2024 Departure Time: 8:00 am

Return Date: 12/28/2024 Return Time: 10:00 pm

Mode of Transportation: school vans

First Student  Transportation Contractor  School System Van  Air Travel

NOTE: Only ORS employees are authorized to drive school system vans.

School System Van – Name of Driver: Hanley Aaron Green

Driver's License Verified by: \_\_\_\_\_ Attach copy of driver's license

Transportation Contractor: \_\_\_\_\_ Phone #: \_\_\_\_\_

*(Only approved transportation companies may be used. Refer to ORS website for list of approved companies)*

Air Travel Flight #'s: \_\_\_\_\_

Hotel/Motel Name: Drury Plaza Hotel

Address: 1874 W McEwen Dr.

City: Franklin State: TN Zip: 37067

Phone: 615-771-6778 Contact Person: Jeremy Moore

Number of Nights: 1 Hotel Rating: 4.5 stars

Name of School Sponsor/Date: Aaron Green 9/4/2024

Signature of School Sponsor:  Cell #: 423-595-1829

*Minimum requires teacher to student ratio:*

PreK – 3 yr olds 1:4      K-2<sup>nd</sup> 1:6      3<sup>rd</sup>-4<sup>th</sup> 1:10      5<sup>th</sup>-8<sup>th</sup> 1:12      9<sup>th</sup>-12<sup>th</sup> 1:15  
4 yr olds 1:6

# of Students: 12

# of Adults: 8+

Chaperone/Student Ratio: 1:2

Professional Staff Chaperone(s)

- 1. Name: Aaron Green Cell #: 423-595-1829
- 2. Name: Ronnie Scott Cell #: 865-599-6970
- 3. Name: Craig Price Cell #: 423-298-6943
- 4. Name: Drayton Hawkins Cell #: 731-431-4946

Other Chaperone(s):

- 1. Name: Shauna James Cell #: 352-52-1906
- 2. Name: Krystal Hawkins Cell #: 731-431-4945
- 3. Name: Candie Price Cell #: 865-660-8393
- 4. Name: Danny Green Cell #: 423-337-1213

Field Trips which exceed \$25,000 or involve out of the country travel require School Board approval, regardless of fund raising, Booster Club participation or other contributions. Please follow these guidelines when requesting approval of such trip:

1. Submit an "Item for Action" for the Board Agenda (Principals have directions on submitting Board Agenda items).
2. Attach as documentation the following items"
  - Completed Campus Leave Request
  - Details of Trip/Itinerary
  - Justification/Explanation of Cost (per student/chaperone/total)
  - Financial Arrangements for students who cannot afford trip (if any)
  - Insurance Details
  - Out of country travel requires a release for each student participant

Financial Arrangements: (please indicate method)

No Cost   
  Paid by Students   
  Paid by School   
  Paid by School System   
 Boosters

Substitute Required      Acct to be charged for Substitute \_\_\_\_\_

\$ \_\_\_\_\_ Per Student      TOTAL TRIP AMOUNT: \$ 2,000

Provisions for those students unable to pay: \_\_\_\_\_  
Trip will be paid by ORHS Boys Basketball Boosters

Other information, comments, and special arrangements: (foreseeable hazards must be identified)  
\_\_\_\_\_  
\_\_\_\_\_

Staff Member:         Aaron Greer        

Date:         9/4/24        

Athletic Director: \_\_\_\_\_

Date: \_\_\_\_\_

**This Section for Athletic Trips Only**

At the high school level up to three events and/or tournaments per season can involve an overnight trip. However, no more than one day of school may be missed for these trips. (Under certain conditions, the Superintendent of Schools or designee may approve additional events.? These trips must be paid entirely from funds outside the Oak Ridge High School Athletic Department. TSSAA Tournament games would be an exception to this policy. (All overnight trips involving middle school athletics require Superintendent or designee approval.)

Number of overnight trips (including this request) requested during the current school year: \_\_\_\_\_

Athletic Director Signature:         Joe Gallo        

Date:         9/5/24        

Principal's Action:  Approved:  Disapproved:

Principal's Signature:         Beth Greer         Date:         9-5-24        

Superintendent or Designee's Action: Approved:  Disapproved:

Superintendent or Designee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Board Approval Date (if required): \_\_\_\_\_

**Centennial HS Basketball Classic**

Franklin, Tennessee

*Dec. 27-28, 2024*

**Friday, December 27th**

12:00am- Depart ORHS for Franklin, TN

3:00pm- Arrive at hotel in Franklin, TN

4:00-500:00pm- Team Dinner

7:30 Game vs Rossvie ( @ Centennial HS)

12:00pm- Lights out

**Saturday, December 28th**

9:00-10:00am- Team Breakfast

10:00am-12:30pm- Free time at hotel

12:30-1:30 Lunch

3:30-4:30- Team Shoot Around

6:00pm- Game vs Stewarts Creek

8:00pm- Depart for Oak Ridge

10:30pm- Arrive at ORHS

DRIVER LICENSE

*Tennessee*  
THE GREAT SMILE STATE

DL# 080491638 Exp 07/10/1977  
DOB 07/11/2025 ISS 07/11/2017

SEX M HT 5'11" WT 175 EYES BLU HAIR BRN  
CLASS D VES NONE

GREEN  
HANLEY AARON  
732 NEBRASKA AVE  
DAN RIDGE IN 37030-3142

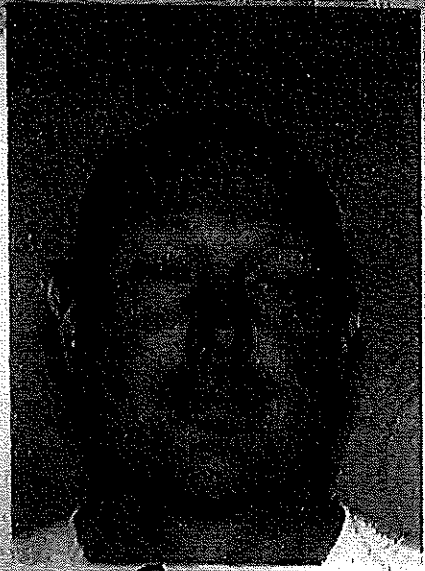


*Aaron Hanley*

**DRIVER LICENSE**

USA  
TN

*Tennessee*  
THE VOLUNTEER STATE



DL NO. **087820190** DOB **01/26/1981**  
EXP **10/13/2031** ISS **10/13/2023**  
CLASS **D** END **NONE**  
REST **NONE**

SEX **M** HGT **6-04"** EYES **BLU**  
DD **9262310130851073**

**PRICE**  
**CRAIG ANTHONY**  
**10345 HIGHGATE CIR**

**KNOXVILLE, TN 37931**

*Craig Price*

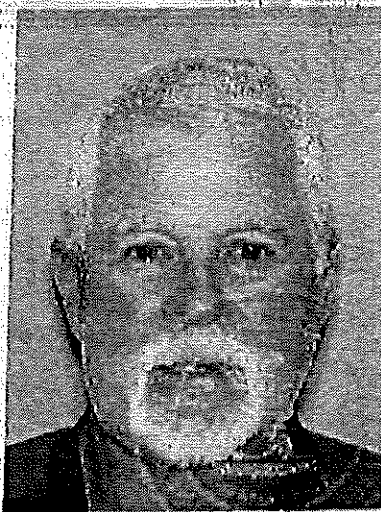
**DL**

DRIVER LICENSE

USA  
TN

Tennessee

THE VOLUNTEER STATE



DL No: 032858694 DOB: 08/02/1948

EXP: 08/09/2026 ISS: 08/09/2018

CLASS D END-F

REST 01

SEX M HGT 5'-11" EYES HAZ

DD 5511808091151547

DL

GREEN  
DENIS LEON  
250 KNOB XING

*Denis L Green*

MADISONVILLE, TN 37354-4003

USA  
TN

**Tennessee**

THE VOLUNTEER STATE

DL NO: **064048368** DOB **02/19/1969**

EXP **02/08/2027** ISS **02/08/2019**

CLASS **D** END **NONE**

REST **NONE**

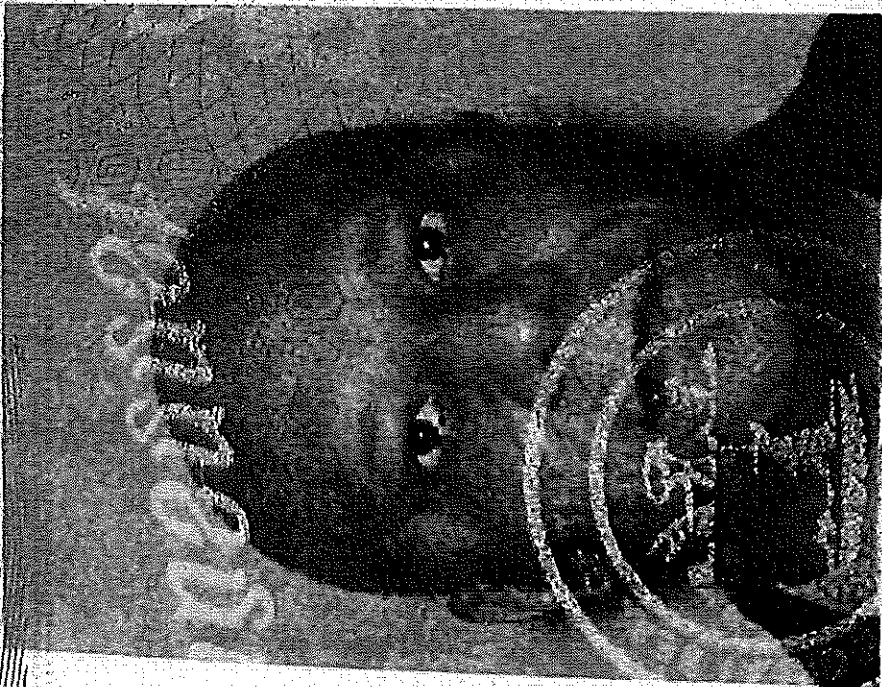
SEX **M** HGT **6'-01"** EYES **BRO**

DD **7551902080954347**

**SCOTT  
RONNIE EUGENE  
133 ARKANSAS AVE**

**OAK RIDGE, TN 37830-5738**

**DRIVER LICENSE**



*Handwritten signature*



# Oak Ridge Schools

OFFICE OF  
Finance Director

Telephone (865) 425-9004

---

---

## MEMORANDUM

**To:** Dr. Bruce Borchers, Superintendent of Schools  
**From:** Jenifer Van Dyke, Finance Director *JVD*  
**Subject:** Recommendation of Audit Firm for FY '25 Audit  
**Date:** September 13, 2024

I recommend that Oak Ridge Schools approve the Audit Firm of Brown Jake & McDaniel, PC for performance of the FY25 Annual Internal School Funds Audit. The attached Engagement Letter for Internal School Funds for FY25 totals \$25,400.00. The BOE audit engagement letter will be provided at a later date. The auditing services are budgeted in account code 141-72310-305.

Please let me know if you have questions or need additional information.

# BROWN JAKE & McDANIEL, PC

CERTIFIED PUBLIC ACCOUNTANTS  
2607 KINGSTON PIKE, SUITE 110  
KNOXVILLE, TENNESSEE 37919-3336  
865/637-8600 • fax: 865/637-8601  
www.bjmpc.com

JOE L. BROWN, CPA, CGFM, CGMA  
FRANK D. McDANIEL, CPA, CGFM, CGMA  
TERRY L. MOATS, CPA, CGFM, CGMA  
JAMES E. BOOHER, CPA, CGMA  
HALEY S. SLAGLE, CPA, CGMA

MEMBERS  
AMERICAN INSTITUTE OF  
CERTIFIED PUBLIC ACCOUNTANTS

September 11, 2024

Jenifer Van Dyke  
Finance Director  
Oak Ridge Schools  
304 New York Ave  
Oak Ridge, TN 37830

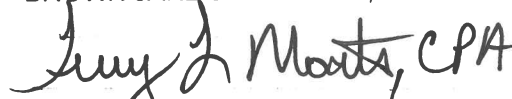
Attached to this email is a draft copy of the Contract to Audit Accounts for Oak Ridge Schools Internal School Funds for the year ending June 30, 2025. We have initiated the contract from our office. Please access the Tennessee Comptroller, Division of Municipal Audit's **Contract and Reporting System (CARS)** website at <https://apps.cot.tn.gov/CARS/> to apply an electronic signature acceptance by a Schools-designated signer. After the Schools' designated representative approves and applies their electronic signature to the audit contract, the Comptroller's office will approve and sign and then notify each party at the e-mail addresses that are set up in each of their respective accounts. They will direct you to access an on-line copy of the final contract through the CARS system by going to **Manage Audit Contracts** and selecting the **Files** link at the end. Please keep the draft copy and a downloaded and/or printed copy of the final original approved contract for your records.

Also, attached is a standard engagement letter for the Internal School Funds' audit to be reviewed and signed by you. Return a signed copy to us and retain a copy for your records.

If you have any questions, please let me know. We appreciate the opportunity of being of service to the Schools and we look forward to working with you and your staff.

Very truly yours,

BROWN JAKE & McDANIEL, PC



Terry L. Moats, CPA, CGFM, CGMA

Email Attachments

**CONTRACT TO AUDIT ACCOUNTS**  
**OF**  
**Oak Ridge City Schools - Internal School Funds**

**FROM July 01, 2024 TO June 30, 2025**

This agreement made this 11th day of September 2024, by and between Brown Jake and McDaniel, PC, 2607 Kingston Pike, Suite 110, Knoxville, TN 37919-3336, hereinafter referred to as the "auditor" and Oak Ridge City Schools - Internal School Funds, of 304 New York Avenue, Oak Ridge, TN 37830, hereinafter referred to as the "organization", as follows:

1. In accordance with the requirements of the laws and/or regulations of the State of Tennessee, the auditor shall perform a financial and compliance audit of the organization for the period beginning July 01, 2024, and ending June 30, 2025 with the exceptions listed below:  
**The General Purpose School, Federal Projects and Cafeteria Funds are excluded from this contract and will be included under the contract to audit the Oak Ridge City Schools General Purpose Financial Statements.**
2. The auditor shall conduct the audit in accordance with *Government Auditing Standards* issued by the Comptroller General of the United States and requirements prescribed by the Comptroller of the Treasury, State of Tennessee, as detailed in the *Audit Manual*. Additional information and procedures necessary to comply with requirements of governments other than the State of Tennessee are permissible provided they do not conflict with or undermine the requirements previously referenced. If applicable, the audit is to be conducted in accordance with the provisions of the Single Audit Act and Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance)*. The audit is also to be conducted in accordance with any other applicable federal agency requirements. It is agreed that this audit will conform to standards, procedures, and reporting requirements established by the Comptroller of the Treasury. It is further agreed that any deviation from these standards and procedures will be approved in writing by the Comptroller of the Treasury prior to the execution of the contract. The interpretation of this contract shall be governed by the above-mentioned publications and the laws of the State of Tennessee.
3. The auditor shall, as part of the written audit report, submit to the organization's management and those charged with governance:
  - a) a report containing an expression of an unmodified or modified opinion on the financial statements, as prescribed by the *Audit Manual*. This report shall state the audit was performed in accordance with *Government Auditing Standards*, except when a disclaimer of opinion is issued. If the organization is a component unit or fund of another entity, it is agreed that: (a) the financial statements may be included in the financial statements of the other entity; (b) the principal auditor for the other entity may rely upon the contracted auditor's report; and (c) any additional information required by the principal auditor of the other entity will be provided in a timely manner.
  - b) a report on the internal control and on compliance with applicable laws and regulations and other matters. This report shall be issued regardless of whether the organization received any federal funding. Audit reports of entities which are subject to the provisions of the Single Audit Act and OMB's Uniform Guidance shall include the additional reports required by that guidance. The reports will set forth findings, recommendations for improvement, concurrence or nonconcurrence of appropriate officials with the audit findings, comments on management's responses as appropriate, and comments on the disposition of prior year findings.
4. If a management letter or any other reports or correspondence relating to other matters involving internal controls or noncompliance are issued in connection with this audit, a copy shall be filed with the Comptroller of the Treasury by the auditor. Such management letters, reports, or correspondence shall be consistent with the findings published in the audit report (i.e., they shall disclose no reportable matters or significant deficiencies not also disclosed in the findings found in the published audit report). The report should also include a corrective action plan for findings developed under OMB's Uniform Guidance and for other findings in accordance with Tennessee Code Annotated § 9-3-407, and the *Audit Manual*. The corrective action plan is only applicable to findings published in the audit report.
5. The auditor shall file **one (1)** electronic copy of said report with the Comptroller of the Treasury, State of Tennessee. The auditor shall furnish **20** printed copies and/or an electronic copy of the report to the organization's management and those charged with governance. It is anticipated that the auditor's report shall be filed no later than **December 31, 2025**, or **six (6) months following the period to be audited, whichever is earlier, without explanation to the Comptroller of the Treasury, State of Tennessee, and the organization. (Audit documentation for additional procedures for centralized cafeteria systems contracted with audits of internal school funds must be completed and available for review by September 30 following the fiscal year being audited.)** Requirements for additional copies, including those to be filed with the appropriate officials of granting agencies, are listed below:  
**None**
6. The auditor agrees to retain working papers for no less than five (5) years from the date the report is received by the Comptroller of the Treasury, State of Tennessee. In addition, the auditor agrees that all audit working papers shall, upon request, be made available in the manner requested by the Comptroller for review by the Comptroller of the Treasury or the Comptroller's representatives, agents, and legal counsel, while the audit is in progress and/or subsequent to the completion of the report. Furthermore, at the Comptroller's discretion, it is agreed that the working papers will be reviewed at the office of the auditor, the entity, or the Comptroller and that copies of the working papers can be made by the Comptroller's representatives or may be requested to be made by the firm and may be retained by the Comptroller's representatives.
7. Any reasonable suspicion of fraud, (regardless of materiality) or other unlawful acts including, but not limited to, theft, forgery, credit/debit card fraud, or any other act of unlawful taking, waste, or abuse of, or official misconduct, as defined in Tennessee Code Annotated § 39-16-402, involving public money, property, or services shall, upon discovery, be promptly reported in writing by the auditor to the Comptroller of the Treasury, State of Tennessee, who shall under all circumstances have the authority, at the discretion of the Comptroller, to directly investigate such matters. Notwithstanding anything herein to the contrary, the Comptroller of the Treasury, State of Tennessee, acknowledges that the auditor's responsibility hereunder is to design its audit to obtain reasonable, but not absolute, assurance of detecting fraud that would have a material effect on the financial statements, as well as other illegal acts or violations of provisions of contracts or grant agreements having a direct and material effect on financial statement amounts. If the circumstances

disclosed by the audit call for a more detailed investigation by the auditor than necessary under ordinary circumstances, the auditor shall inform the organization's management and those in charge of governance in writing of the need for such additional investigation and the additional compensation required therefor. Upon approval by the Comptroller of the Treasury, an amendment to this contract may be made by the organization's management, those charged with governance, and the auditor for such additional investigation.

8. **Group Audits.** The provisions of Section 8 relate exclusively to contracts to audit components of a group under AU-C 600. (See definitions in AU-C 600, Paragraph 11.) Section 8 is only applicable to an auditor that audits a component (e.g., a fund, component unit, or other component) of a county government that is audited by the Division of Local Government Audit (LGA). Section 8 is intended to satisfy the communication requirements for the group auditor (LGA) to the component auditor under AU-C 600.

- a) The Division of Local Government Audit (LGA) shall be considered the "group auditor" for any contract to audit a component of an applicable county government. LGA shall present the county's financial statements in compliance with U.S. Generally Accepted Accounting Principles (GAAP) as promulgated by the Governmental Accounting Standards Board (GASB). LGA shall conduct the audit in accordance with auditing standards generally accepted in the United States of America and the auditing standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States.
- b) The contracting auditor shall be considered the "component auditor" for purposes of this section.
- c) The financial statements audited by the component auditor should be presented in accordance with GAAP as promulgated by GASB. If the financial reporting framework for any component does not conform to this basis, the financial reporting framework should be disclosed in Section 10 (Special Provisions). (Component financial statements that are not presented using the same financial reporting framework as the county's financial statements may cause this contract to be rejected.)
- d) The component auditor shall conduct the component audit in accordance with auditing standards generally accepted in the United States of America and the auditing standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States.
- e) The component auditor shall cooperate with LGA to accomplish the group audit. It is anticipated that LGA will make reference to the component auditor's report in the group audit report. Should LGA find it necessary to assume responsibility for the component auditor's work, the terms, if any, shall be negotiated under a separate addendum to this contract.
- f) The component auditor shall follow the ethical requirements of *Government Auditing Standards* and affirms that the component auditor is independent to perform the audit and will remain independent throughout the course of the component audit engagement.
- g) The component auditor affirms that the component auditor is professionally competent to perform the audit. LGA may confirm certain aspects of the component auditor's competence through the Tennessee State Board of Accountancy.
- h) The component auditor will be contacted via email by the LGA's Audit Review Manager with the estimated date of the conclusion of LGA's audit of the county government. The component auditor agrees to update subsequent events between the date of the component auditor's report and the date of the conclusion of LGA's audit of the county government. Additional subsequent events should be communicated via email to LGA's Audit Review Manager.
- i) The component auditor shall read LGA's audited financial statements for the county government for the previous fiscal year noting in particular **related parties** in the notes to the financial statements, and **material misstatement** findings in the Findings and Questioned Costs Section. The previous year audited financial statements can be obtained from the Comptroller's website at [www.comptroller.tn.gov](http://www.comptroller.tn.gov). As required by generally accepted auditing standards, we have identified Management Override of Controls and Improper Revenue Recognition as presumptive fraud risks. The component auditor shall communicate to LGA (i.e., group management) on a timely basis **related parties** not previously identified by the group management in LGA's prior year audited financial statements. Related parties should be communicated via email to LGA's Audit Review Manager.
- j) The component auditor's report should not be restricted as to use in accordance with AU-C 905.
- k) Sections 1-7 and Sections 10-14 of this contract are also applicable to the component auditor during the performance of the component audit.

9. **Municipal Chart of Accounts Crosswalk.** The provisions of Section 9 relate exclusively to contracts to audit of a municipality, municipality's fund(s), and municipality's school board of education. The auditor shall convert respective municipal audited financial data into a condensed chart of accounts by use of a Microsoft Excel crosswalk tool prescribed by the Comptroller of the Treasury, State of Tennessee, or if a respective municipality, municipality's fund(s), or municipality's school board of education chooses to convert their own audited financial data by use of the crosswalk, the auditor shall verify the accuracy of their conversion. The completed condensed chart of accounts crosswalk in Microsoft Excel format shall be filed with the Comptroller of the Treasury, State of Tennessee, by the auditor when the audited financial report is submitted.

10. (Special Provisions) None

11. In consideration of the satisfactory performance of the provisions of this contract, the organization shall pay to the auditor the fee(s) listed below. (Fees may be fixed amounts or estimated.)

**Fixed Contract Fee:**

Audit \$25,400.00

Municipal Chart of Accounts Crosswalk \$0.00

Total Fixed Contract Fee \$25,400.00

or

**Estimated Contract Fee:**

Audit

Municipal Chart of Accounts Crosswalk

Total Estimated Contract Fee

(If not a fixed amount, an estimated contract fee should be furnished to the governing unit for budgetary purposes. A schedule of fees and/or rates should be set forth below. Interim billings may be arranged with consent of both parties to this contract.) Provision for the payment of fees under this agreement has been or will be made by appropriation of management and those charged with governance.

SCHEDULE OF FEES AND/OR RATES:

February 2023

**Fixed audit fee (except any work related to CARES Act funding which would be billed at standard hourly rates) plus out-of-pocket costs.**

12. As the authorized representative of the firm, I do hereby affirm that:
- our firm and all individuals participating in the audit are in compliance with all requirements of the Tennessee State Board of Accountancy and;
  - our firm has participated in an external quality control review at least once every three (3) years, conducted by an organization not affiliated with our firm, and that a copy of our most recent external quality control review report has been provided to the organization and the office of the Tennessee Comptroller of the Treasury approving this contract;
  - all members of the staff assigned to this audit have obtained the necessary hours of continuing professional education required by *Government Auditing Standards*;
  - all auditors participating in the engagement are independent under the requirements of the American Institute of Certified Public Accountants and *Government Auditing Standards*.

13. This writing, including any amendments or special provisions, contains all terms of this contract. There are no other agreements between the parties hereto and no other agreements relative hereto shall be enforceable, unless entered into in accordance with the procedures set out herein and approved by the Comptroller of the Treasury, State of Tennessee. In the event of a conflict or inconsistency between this contract and the special provisions contained in paragraph 10 of this contract, the special provision(s) are deemed to be void. Any changes to this contract must be agreed to in writing by the parties hereto and must be approved by the Comptroller of the Treasury, State of Tennessee. All parties agree that the digital signatures, that is, the electronic signatures applied by submitting the contract, are acceptable as provided for in the Uniform Electronic Transaction Act. Any paper documents submitted related to this contract will be converted to an electronic format and such electronic document(s) will be treated as the official document(s).

14. If any term of this contract is declared by a court having jurisdiction to be illegal or unenforceable, the validity of the remaining terms will not be affected, and, if possible, the rights and obligations of the parties are to be construed and enforced as if the contract did not contain that term.

Audit firm

Governmental Unit or Organization

By

Signature

By

Signature

Title/Position:

Title/Position:

E-mail address:

E-mail address:

Date:

Date:

**Approved by the Comptroller of the Treasury, State of Tennessee**

For the Comptroller:

By

Date:

# BROWN JAKE & McDANIEL, PC

CERTIFIED PUBLIC ACCOUNTANTS  
2607 KINGSTON PIKE, SUITE 110  
KNOXVILLE, TENNESSEE 37919-3336  
865/637-8600 • fax: 865/637-8601  
www.bjmpc.com

JOE L. BROWN, CPA, CGFM, CGMA  
FRANK D. McDANIEL, CPA, CGFM, CGMA  
TERRY L. MOATS, CPA, CGFM, CGMA  
JAMES E. BOOHER, CPA, CGMA  
HALEY S. SLAGLE, CPA, CGMA

MEMBERS  
AMERICAN INSTITUTE OF  
CERTIFIED PUBLIC ACCOUNTANTS

September 11, 2024

Jenifer Van Dyke  
Finance Director  
Oak Ridge Schools  
304 New York Ave  
Oak Ridge, TN 37830

We are pleased to confirm our understanding of the services we are to provide the Oak Ridge Schools (the Schools) for the year ending June 30, 2025.

## **Audit Scope and Objectives**

We will audit the combined and individual fund balance sheets and the related combined and individual statements of revenues, expenditures and changes in fund balance, including the related notes to the financial statements, which collectively comprise the basic financial statements of the Oak Ridge Schools Internal School Funds as of and for the year ending June 30, 2025. Also, the following supplementary information accompanying the financial statements will be subjected to the auditing procedures applied in our audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America (GAAS), and we will provide an opinion on it in relation to the financial statements as a whole in a report combined with our auditor's report on the financial statements:

- 1) Balance Sheet – Regulatory Basis (Per School)
- 2) Statement of Revenues, Expenditures and Changes in Fund Balance – Regulatory Basis (Per School)
- 3) Schedule of Interfund and Interaccount Transfers (By School)
- 4) Schedule of Salary Supplements (By School)
- 5) Schedule of Fidelity Bond Coverage

The objectives of our audit are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and issue an auditor's report that includes our opinion about whether your financial statements are fairly presented, in all material respects, in conformity with accounting principles generally accepted in the United States of America and to report on the fairness of the supplementary information referred to in the second paragraph when considered in relation to the financial statements as a whole. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from fraud or error and are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment of a reasonable user made based on the financial statements.

The objectives also include reporting on internal control over financial reporting and compliance with provisions of laws, regulations, contracts, and award agreements, noncompliance with which could have a material effect on the financial statements in accordance with *Government Auditing Standards*.

### **Auditor's Responsibilities for the Audit of the Financial Statements**

We will conduct our audit in accordance with GAAS and the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States, and will include tests of your accounting records and other procedures we consider necessary to enable us to express such an opinion. As part of an audit in accordance with GAAS and *Government Auditing Standards*, we exercise professional judgment and maintain professional skepticism throughout the audit.

We will evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management. We will also evaluate the overall presentation of the financial statements, including the disclosures, and determine whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation. We will plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the Organization or to acts by management or employees acting on behalf of the Organization. Because the determination of waste and abuse is subjective, *Government Auditing Standards* do not expect auditors to perform specific procedures to detect waste or abuse in financial audits nor do they expect auditors to provide reasonable assurance of detecting waste or abuse.

Because of the inherent limitations of an audit, combined with the inherent limitations of internal control, and because we will not perform a detailed examination of all transactions, there is an unavoidable risk that some material misstatements may not be detected by us, even though the audit is properly planned and performed in accordance with GAAS and *Government Auditing Standards*. In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements. However, we will inform the appropriate level of management of any material errors, fraudulent financial reporting, or misappropriation of assets that comes to our attention. We will also inform the appropriate level of management of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential. Our responsibility as auditors is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

We will also conclude, based on the audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Organization's ability to continue as a going concern for a reasonable period of time.

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts, tests of the physical existence of inventories, and direct confirmation of receivables and certain assets and liabilities by correspondence with selected individuals, funding sources, creditors, and financial institutions. We will also request written representations from your attorneys as part of the engagement.

We have identified the following significant risk(s) of material misstatement as part of our audit planning:

Restricted revenues and expenses being recorded in incorrect club/class/restricted fund.

We may, from time to time and depending on the circumstances, use third-party service providers in serving your account. We may share confidential information about you with these service providers but remain committed to maintaining the confidentiality and security of your information. Accordingly, we maintain internal policies, procedures, and safeguards to protect the confidentiality of your personal information. In addition, we will secure confidentiality agreements with all service providers to maintain the confidentiality of your information and we will take reasonable precautions to determine that they have appropriate procedures in place to prevent the unauthorized release of your confidential information to others. In the event that we are unable to secure an appropriate confidentiality agreement, you will be asked to provide your consent prior to the sharing of your confidential information with the third-party service provider. Furthermore, we will remain responsible for the work provided by any such third-party service providers.

Our audit of the financial statements does not relieve you of your responsibilities.

#### **Audit Procedures—Internal Control**

We will obtain an understanding of the government and its environment, including internal control relevant to the audit, sufficient to identify and assess the risks of material misstatement of the financial statements, whether due to error or fraud, and to design and perform audit procedures responsive to those risks and obtain evidence that is sufficient and appropriate to provide a basis for our opinion. Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting errors and fraud that are material to the financial statements and to preventing and detecting misstatements resulting from illegal acts and other noncompliance matters that have a direct and material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards*. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentation, or the override of internal control. An audit is not designed to provide assurance on internal control or to identify significant deficiencies or material weaknesses. Accordingly, we will express no such opinion. However, during the audit, we will communicate to you and those charged with governance internal control related matters that are required to be communicated under AICPA professional standards and *Government Auditing Standards*.

#### **Audit Procedures—Compliance**

As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of the Schools' compliance with the provisions of applicable laws, regulations, contracts, agreements, and grants. However, the objective of our audit will not be to provide an opinion on overall compliance and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.

#### **Responsibilities of Management for the Financial Statements**

Our audit will be conducted on the basis that you acknowledge and understand your responsibility for designing, implementing, establishing, and maintaining effective internal controls relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error, and for evaluating and monitoring ongoing activities to help ensure that appropriate goals and objectives are met; following laws and regulations; and ensuring that management and financial information is reliable and properly reported. Management is also responsible for implementing systems designed to achieve compliance with applicable laws, regulations, contracts, and grant agreements. You are also responsible for the selection and application of accounting principles, for the preparation and fair presentation of the financial statements and all accompanying information in conformity with accounting principles generally accepted in the United States of America, and for compliance with applicable laws and regulations and the provisions of contracts and grant agreements.

Management is responsible for making drafts of financial statements, all financial records, and related information available to us and for the accuracy and completeness of that information (including information from outside of the general and subsidiary ledgers). You are also responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, such as records, documentation, identification of all related parties and all related-party relationships and transactions, and other matters; (2) additional information that we may request for the purpose of the audit; and (3) unrestricted access to persons within the government from whom we determine it necessary to obtain audit evidence. At the conclusion of our audit, we will require certain written representations from you about your responsibilities for the financial statements; compliance with laws, regulations, contracts, and grant agreements; and other responsibilities required by GAAS and *Government Auditing Standards*.

Your responsibilities include adjusting the financial statements to correct material misstatements and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us

during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

You are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the government involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the government received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for identifying and ensuring that the government complies with applicable laws, regulations, contracts, agreements, and grants and for taking timely and appropriate steps to remedy fraud and noncompliance with provisions of laws, regulations, contracts, and grant agreements that we report.

You are responsible for the preparation of the supplementary information, which we have been engaged to report on, in conformity with accounting principles generally accepted in the United States of America (GAAP). You agree to include our report on the supplementary information in any document that contains, and indicates that we have reported on, the supplementary information. You also agree to include the audited financial statements with any presentation of the supplementary information that includes our report thereon or make the audited financial statements readily available to users of the supplementary information no later than the date the supplementary information is issued with our report thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the supplementary information in accordance with GAAP; (2) you believe the supplementary information, including its form and content, is fairly presented in accordance with GAAP; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the supplementary information.

Management is responsible for establishing and maintaining a process for tracking the status of audit findings and recommendations. Management is also responsible for identifying and providing report copies of previous financial audits, attestation engagements, performance audits, or other studies related to the objectives discussed in the Audit Scope and Objectives section of this letter. This responsibility includes relaying to us corrective actions taken to address significant findings and recommendations resulting from those audits, attestation engagements, performance audits, or other engagements or studies. You are also responsible for providing management's views on our current findings, conclusions, and recommendations, as well as your planned corrective actions for the report, and for the timing and format for providing that information.

### **Other Services**

We will also assist in preparing the financial statements and related notes of the Schools in conformity with accounting principles generally accepted in the United States of America based on information provided by you. These nonaudit services do not constitute an audit under *Government Auditing Standards* and such services will not be conducted in accordance with *Government Auditing Standards*. We will perform the services in accordance with applicable professional standards. The other services are limited to the financial statements and related notes services previously defined. We, in our sole professional judgment, reserve the right to refuse to perform any procedure or take any action that could be construed as assuming management responsibilities.

You agree to assume all management responsibilities for the financial statements and related notes, and any other nonaudit services we provide. You will be required to acknowledge in the management representation letter our assistance with the preparation of the financial statements and related notes and that you have reviewed and approved the financial statements and related notes prior to their issuance and have accepted responsibility for them. Further, you agree to oversee the nonaudit services by designating an individual, preferably from senior management, with suitable skill, knowledge, or experience; evaluate the adequacy and results of those services; and accept responsibility for them.

### **Engagement Administration, Fees, and Other**

We understand that your employees will prepare all cash, accounts receivable, and other confirmations we request and will locate any documents selected by us for testing.

We will provide copies of our reports to Oak Ridge Schools; however, management is responsible for distribution of the reports and the financial statements. Unless restricted by law or regulation, or containing privileged and confidential information, copies of our reports are to be made available for public inspection.

The audit documentation for this engagement is the property of Brown Jake & McDaniel, PC and constitutes confidential information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to the Comptroller of the State of Tennessee or its designee, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of Brown Jake & McDaniel, PC personnel. Furthermore, upon request, we may provide copies of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

The audit documentation for this engagement will be retained for a minimum of five years after the report release date or for any additional period requested by the Comptroller of the State of Tennessee. If we are aware that a federal awarding agency, pass-through entity, or auditee is contesting an audit finding, we will contact the party(ies) contesting the audit finding for guidance prior to destroying the audit documentation.

Terry Moats is the engagement partner and is responsible for supervising the engagement and signing the reports or authorizing another individual to sign them. We expect to begin our audit procedures on approximately June 30, 2025 and to issue our reports no later than December 31, 2025.

Our fees for these services will be \$25,400.00 plus out-of-pocket costs (such as report reproduction, word processing, postage, travel mileage, travel time, electronic confirmations, audit software, etc.) and additional fees at normal hourly rates for any work related to CARES Act funding or non-audit services related to implementation of new GASB Standards/Pronouncements and the related changes to the financial statement presentation. The fee is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the audit. If significant additional time is necessary, we will discuss it with you and arrive at a new fee before we incur the additional costs. Our invoices for these fees will be rendered each month as work progresses and are payable on presentation. In accordance with our firm policies, work may be suspended if your account becomes 30 days or more overdue and will not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed upon written notification or termination, even if we have not completed our report. You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket expenditures through the date of termination.

### **Reporting**

We will issue a written report upon completion of our audit of Oak Ridge Schools Internal School Funds' financial statements. Our report will be addressed to the Board of Education of Oak Ridge Schools. Circumstances may arise in which our report may differ from its expected form and content based on the results of our audit. Depending on the nature of these circumstances, it may be necessary for us to modify our opinion, add a separate section, or add an emphasis-of-matter or other-matter paragraph to our auditor's report, or if necessary, withdraw from this engagement. If our opinion is other than unmodified, we will discuss the reasons with you in advance. If, for any reason, we are unable to complete the audit or are unable to form or have not formed an opinion, we may decline to express an opinion or issue reports, or we may withdraw from this engagement.

We will also provide a report (which does not include an opinion) on internal control related to the financial statements and compliance with the provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a material effect on the financial statements as required by *Government*

*Auditing Standards.* The report on internal control and on compliance and other matters will state that (1) the purpose of the report is solely to describe the scope of testing of internal control and compliance, and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control on compliance and (2) the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. The report will also state that the report is not suitable for any other purpose. If during our audit we become aware that Oak Ridge Schools is subject to an audit requirement that is not encompassed in the terms of this engagement, we will communicate to management and those charged with governance that an audit in accordance with U.S. generally accepted auditing standards and the standards for financial audits contained in *Government Auditing Standards* may not satisfy the relevant legal, regulatory, or contractual requirements.

*Government Auditing Standards* (if applicable) require that we provide you with a copy of our most recent external peer review report and any letter of comment, and any subsequent peer review reports and letters of comment received during the period of the contract. Our 2021 peer review report is attached.

We appreciate the opportunity to be of service to Oak Ridge Schools and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign the attached copy and return it to us.

Very truly yours,



BROWN JAKE & McDANIEL, PC

RESPONSE:

This letter correctly sets forth the understanding of Oak Ridge Schools.

Management signature:

\_\_\_\_\_

Title:

\_\_\_\_\_

Date:

Governance signature:

\_\_\_\_\_

Title:

\_\_\_\_\_

Date:



CERTIFIED PUBLIC ACCOUNTANTS  
CHATTANOOGA | MEMPHIS

## Report on the Firm's System of Quality Control

November 19, 2021

To The Partners of Brown, Jake & McDaniel, P.C. and the Peer Review Committee of the Tennessee Society of CPAs.

We have reviewed the system of quality control for the accounting and auditing practice of Brown, Jake & McDaniel, P.C (the firm) in effect for the year ended May 31, 2021. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards). A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System review as described in the standards may be found at [www.aicpa.org/prsummary](http://www.aicpa.org/prsummary). The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

### Firm's Responsibility

The firm is responsible for designing a system of quality control and complying with it to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported in conformity with professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

### Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of the system of quality control and the firm's compliance therewith based on our review.

### Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including a compliance audit under the Single Audit Act, and an audit of an employee benefit plan.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

### Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Brown, Jake & McDaniel, P.C in effect for the year ended May 31, 2021, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency* or *fail*. Brown, Jake & McDaniel, P.C has received a peer review rating of *pass*.

Henderson Hutcherson  
& McCullough, PLLC

1200 Market Street, Chattanooga, TN 37402 | T 423.756.7771 | F 423.265.8125

AN INDEPENDENT MEMBER OF THE BDO ALLIANCE USA

January 19, 2022

Joe Brown  
Brown, Jake & McDaniel, P. C.  
2607 Kingston Pike Ste 110  
Knoxville, TN 37919-3336

Dear Joe Brown:

It is my pleasure to notify you that on January 12, 2022, the Tennessee Peer Review Committee accepted the report on the most recent System Review of your firm. The due date for your next review is November 30, 2024. This is the date by which all review documents should be completed and submitted to the administering entity.

As you know, the report had a peer review rating of pass. The Committee asked me to convey its congratulations to the firm.

Thank you for your cooperation.

Sincerely,



Katie Cheek  
Director of Member Services  
kcheek@tscpa.com  
615-377-3825

cc: Randy Dummer, Frank McDaniel

Firm Number: 900010096645

Review Number: 587111



MEMORANDUM  
OAK RIDGE SCHOOLS

Marcia Wade  
21<sup>st</sup> CCLC Grant Director

To: Mr. Bruce Lay, Executive Director of School Leadership

From: Marcia Wade, 21<sup>st</sup> CCLC Grant Director

Subject: 21st Century Community Learning Center Grant

Date: September 13, 2024

The 21<sup>st</sup> Century Community Learning Center (CCLC) grant is used to support before and after school programming at Glenwood Elementary and Willow Brook Elementary. The grant is for \$118, 750 and divided between our two sites. Funding is used to cover the costs of salaries, benefits, and materials.



Oak Ridge Schools • 304 New York Avenue • Oak Ridge, TN 37831  
(865) 425-9027 • Fax (865) 425-9061 • [jcstults@ortn.edu](mailto:jcstults@ortn.edu) • [www.ortn.edu](http://www.ortn.edu)  
**Every student prepared for college, career, and life success**

---

**John C. Stults II, Executive Director of Student Services**

To: Board of Education

September 9, 2024

Memorandum for FY 25 State Special Education Preschool Grant

- I recommend approval of the FY 25 State Special Education Preschool Grant.
- This grant provides us the opportunity to pay for an additional special education teacher at Oak Ridge Preschool.
- The additional teacher allows us to reduce our teacher/student ratio and provide additional special education services to students across our full continuum of special education settings.
- Grant overview is attached.

Sincerely,

John C. Stults II



ePlan Home
Search
Reports
Inbox
Planning
Monitoring
Funding
Data and Information
Reimbursement Requests
Project Summary
LEA Document Library
Address Book
TDOE Resources
Help for Current Page
Contact TDOE
ePlan Sign Out
Stults, John
Production
Session Timeout (Hide Timer)
00:26:44

### Budget Overview

Oak Ridge (012) Public District - FY 2025 - State Special Education Preschool Grant - Rev 0 - State Special Education Preschool Grant

Go To

Filter by Location: All - \$101,177.59

Show Unbudgeted Categories

	Account Number	71200 - Special Education Program	Total
Line Item Number			
116 - Teachers		70,000.00	70,000.00
201 - Social Security		6,000.00	6,000.00
204 - State Retirement		3,500.00	3,500.00
207 - Medical Insurance		15,000.00	15,000.00
208 - Dental Insurance		500.00	500.00
212 - Employer Medicare		3,000.00	3,000.00
725 - Special Education Equipment		3,177.59	3,177.59
<b>Total</b>		<b>101,177.59</b>	<b>101,177.59</b>
		<b>Adjusted Allocation</b>	<b>101,177.59</b>
		<b>Remaining</b>	<b>0.00</b>

Go To

[TN.gov Directory](#) | [Web Policies](#) | [Accessibility](#)

TN Department of Education | Andrew Johnson Tower | 710 James Robertson Parkway | Nashville, TN 37243 | (629) 395-4684 | [ePlan.Help@tn.gov](mailto:ePlan.Help@tn.gov)

# Oak Ridge Schools Board of Education

Monitoring: <b>Review: Annually, in December</b>	Descriptor Term: <b>Grading System</b>	Descriptor Code: <b>4.600</b>	Issued Date: <b>08/05/24</b>
		Rescinds:	Issued: <b>08/01/22</b> <b>08/28/17</b> <b>11/24/14</b>

1 The Superintendent or designee shall develop an administrative procedure to establish a system of  
2 grading and assessment for evaluating and recording student progress and to measure student  
3 performance in conjunction with board-adopted content standards for grades K-8. The  
4 grading/assessment system shall follow all applicable statutes and rules and regulations of the State  
5 Board of Education. The grading/assessment system shall be uniform district-wide at comparable grade  
6 levels, except that the Superintendent or designee shall have the authority to establish and operate  
7 ungraded and/or unstructured classes in grades K-3 according to state rules and regulations.<sup>1</sup>

8 The Superintendent or designee shall submit a copy of the grading, reporting and assessment systems to  
9 the board before the system is implemented.<sup>2</sup> These guidelines shall be communicated annually to  
10 students and parents/guardians.<sup>1</sup>

11 Conduct grades are based on behavior and shall not be deducted from scholastic grades.

## 12 **GRADING SYSTEM: GRADES NINE - TWELVE (9-12)<sup>1</sup>**

13 Schools teaching grades nine through twelve shall use the uniform grading system established by the  
14 State Board of Education. Using the uniform grading system, students' grades shall be reported for the  
15 purposes of application for post-secondary financial assistance administered by the Tennessee Student  
16 Assistance Corporation.

17 Subject-area grades shall be expressed by the following letters with their corresponding percentage  
18 range:

- 19 • A (90-100)
- 20 • B (80-89)
- 21 • C (70-79)
- 22 • D (60-69)
- 23 • F (0-59)

24 Grading floors with a minimum above zero are not permitted.<sup>3</sup> This grading system shall be uniform  
25 throughout the school district for each grade.

26 Advanced coursework grades will be weighted with additional percentage points to calculate the  
27 semester average. Depending on the course taken, the following percentage points will be assigned:

- 28 • Honors Courses – three (3) percentage points;

- 1       • Local and Statewide Dual Credit, Capstone Industry Certification Aligned, – four (4) percentage  
2 points; and  
3       • Advanced Placement, Cambridge International, College Level Exam Program (CLEP),  
4 International Baccalaureate Courses, and Dual Enrollment Courses – five (5) percentage points.

### 5 **LOTTERY SCHOLARSHIPS<sup>3</sup>**

6 Each school counselor shall provide incoming freshman with information on college core courses  
7 required for lottery scholarships as well as necessary criteria (grade point average, ACT, and SAT score,  
8 etc.) that must be met in order to receive a scholarship.

9 Seniors may apply for the Tennessee HOPE Scholarship by completing the Free Application for Federal  
10 Student Aid (FAFSA). The FAFSA is available at the guidance office or online. Students shall be made  
11 aware of all applicable FAFSA deadlines and encouraged to submit applications in a timely manner.

12 Elementary and middle school counselors shall explain the HOPE Scholarship and its requirements to  
13 their students and impress upon them the benefits of making good grades.

### 14 **LOTTERY SCHOLARSHIP DAY**

15 Each school year, prior to scheduling courses for the following school year, schools teaching students in  
16 grades 8-11 shall conduct a lottery scholarship day for students and their parents.<sup>4</sup>

---

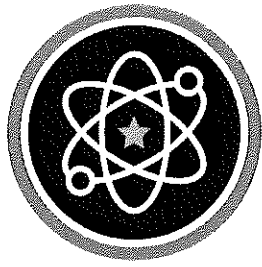
#### Legal References

1. TCA 49-2-203(b)(16); TCA 49-2-301(b)(1)(H)
2. TRR/MS 0520-01-03-.02, State Board of Education Policy 3.301; TCA 49-6-407
3. [Public Acts of 2024, Chapter No. 1005 TCA 49-2-203\(b\)\(7\); TCA 49-2-301\(b\)\(1\)\(H\)](#)
4. TCA 49-4-904, 905, 907
5. TCA 49-4-932(f)

---

#### Cross References

Alternative Credit Options 4.209  
Credit Recovery 4.210  
Reporting Student Progress 4.601  
Honor Roll, Awards, & Class Ranking 4.602  
Promotion and Retention 4.603  
Transcript Alterations 4.608



# Oak Ridge

SCHOOLS

Maintenance and Operations

OFFICE OF MAINTENANCE AND OPERATIONS

**DATE:** September 5, 2024

**TO:** Bruce Lay, Executive Director of School Leadership

**FROM:** Allen Thacker, Director of Maintenance and Operations

**SUBJECT:** Purchase of HVAC Equipment

Mr. Lay,

I am recommending that the Oak Ridge Schools Board of Education approve the purchase of HVAC Equipment from Trane US Inc. in the amount of \$54,030.00. This equipment will replace the Woodland rooftop unit number 14, the Superintendent's office unit, and the unit that serves the Teaching and Learning offices at SAB. Each unit has either exceeded its life or has experienced a mechanical failure. The units are priced through the Omnia Racine #3341 cooperative purchasing agreement.

Funding for this project is from the Capital Improvements Program (CIP) funds provided by the city.

Thank you for your consideration,

Allen Thacker

Director of Maintenance and Operations

**Maintenance Office**

100 Woodbury, Oak Ridge, TN 37830

(865) 425-3171

[www.ortn.edu](http://www.ortn.edu)



# Proposal

Proposal is valid for 15 days.

Customer must obtain credit approval and release order to production within 60 days of proposal date.

**PROPRIETARY AND CONFIDENTIAL PROPERTY OF Trane U.S. Inc.**  
**DISTRIBUTION TO OTHER THAN THE NAMED RECIPIENT IS PROHIBITED**

**Prepared For:** Oak Ridge Schools  
 Attn: Allen Thacker

**Date:** August 30, 2024

**Job Name:**  
 Oak Ridge Schools Woodland Unit 14

**Proposal Number:** J1-73156-11164-1  
**COOP or Federal Contract ID:** OMNIA Racine #3341

**Delivery Terms:**  
 Freight Allowed and Prepaid - F.O.B. Factory

**Payment Terms:** Net 30 Days

Trane U.S. Inc. is pleased to provide the following proposal for your review and approval.

**Tag Data - 6- 25 Ton PKGD Precedent Unitary Rooftops (Qty: 1)**

Item	Tag(s)	Qty	Description	Model Number
A1	PREC-1	1	25 Ton PKGD Precedent Unitary Rooftops	YSJ300A4SAL**F000C101

**Product Data - 6- 25 Ton PKGD Precedent Unitary Rooftops**

**Item: A1 Qty: 1 Tag(s): PREC-1**  
 DX Cooling / Gas Heat  
 Standard Efficiency  
 R-410A  
 25 Ton  
 460/60/3  
 Symbio 700  
 Stainless Steel Gas Heat  
 Low Gas Heat  
 Economizer, Reference Enthalpy with Barometric Relief  
 Through the Base Electric and Gas  
 Non-Fused Disconnect Switch  
 Advanced Controls and BACnet BAS  
 3-year parts, coils & controls warranty  
 5-year compressor parts only warranty  
 15-year stainless steel heat exchanger  
 6-10th year whole unit parts  
 4th-5th yr parts less compr warranty

Total Net Price (Excluding Sales Tax) ..... \$ 33,000.00

Tax Status: Taxable <input checked="" type="checkbox"/> Exempt <input checked="" type="checkbox"/>	IF EXEMPT PLEASE SUBMIT COMPLETED TAX EXEMPTION CERTIFICATE WITH YOUR SIGNED PROPOSAL OR WITH YOUR PURCHASING DOCUMENTS, KEEP YOUR ORIGINAL ON FILE IN THE OFFICE. YOU WILL BE CHARGED TAX IF A VALID EXEMPTION CERTIFICATE IS NOT ON FILE BEFORE EQUIPMENT, PARTS OR SERVICES ARE PROVIDED. SEE <a href="http://WWW.TAXSITES.COM/STATE-LINKS.HTML">WWW.TAXSITES.COM/STATE-LINKS.HTML</a> FOR TAX FORMS.
---	--

Sincerely,

**Michael McDowell**  
**Trane U.S. Inc.**  
5220 Middlebrook Pike S.  
Knoxville, TN 37921  
Office Phone: (865) 588-0607  
Fax: (865) 588-0600

**This proposal is subject to your acceptance of the attached Trane terms and conditions.**

CUSTOMER ACCEPTANCE	TRANE ACCEPTANCE
Oak Ridge Schools	Trane U.S. Inc.
_____ Company Name	_____
<u>Allen Thacker</u> Authorized Representative	_____
<u>Allen Thacker</u> Printed Name	Michael McDowell Printed Name
<u>Director of Maintenance</u> Title	_____
Purchase Order <u>CIP25.007</u>	_____
Acceptance Date <u>8/30/2024</u>	Signature Date _____

**TERMS AND CONDITIONS - COMMERCIAL EQUIPMENT**

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

**1. Acceptance.** These terms and conditions 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 sale of the described commercial equipment and any ancillary services (the "Equipment"). **COMPANY'S TERMS AND CONDITIONS AND EQUIPMENT PRICES ARE SUBJECT TO PERIODIC CHANGE OR AMENDMENT.** 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 15 days from the date of the Proposal. Prices in the Proposal are subject to change at any time upon notice to Customer. 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 Company's 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 provide Equipment in accordance with the Proposal and the Company's terms and conditions. If Customer does not reject or object in writing to Company within 10 days, Company's counteroffer will be deemed accepted. Notwithstanding anything to the contrary herein, Customer's acceptance of the Equipment 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.

**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. Title and Risk of Loss.** All Equipment sales with destinations to Canada or the U.S. shall be made as follows: FOB Company's U.S. manufacturing facility or warehouse (full freight allowed). Title and risk of loss or damage to Equipment will pass to Customer upon tender of delivery of such to carrier at Company's U.S. manufacturing facility or warehouse.

**4. Pricing and Taxes.** Within forty-five (45) days following Customer acceptance of the Proposal without addition of any other terms and conditions of sale or any modification, Customer shall provide notification of release for immediate production at Company's factory. Prices for Equipment are subject to change at any time prior to shipment to reflect any cost increases related to the manufacture, supply, and shipping of Equipment. 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. If shipment is delayed due to Customer's actions, Company may also charge Customer with storage fees. If a release is not received within 6 months following order acceptance, Company reserves the right to cancel any order. Company shall be entitled to equitable adjustments in the contract price to reflect any cost increases as set forth above and will provide notice to Customer prior to the date for which the increased price is to be in effect for the applicable customer contract. In no event will prices be decreased. The price of Equipment does not include any present or future foreign, federal, state, or local property, license, privilege, sales, use, excise, value added, gross receipts or other like taxes or assessments. Such amounts will be itemized separately to Customer, who will make prompt payment to Company. Company will accept valid exemption documentation for such taxes and assessments from Customer, if applicable. All prices include packaging in accordance with Company's standard procedures. Charges for special packaging, crating or packing are the responsibility of Customer.

**5. Delivery and Delays.** Delivery dates are approximate and not guaranteed. Company will use commercially reasonable efforts to deliver the Equipment on or before the estimated delivery date, will notify Customer if the estimated delivery dates cannot be honored, and will deliver the Equipment and services as soon as practicable thereafter. In no event will Company be liable for any damages or expenses caused by delays in delivery.

**6. Performance.** Company shall be obligated to furnish only the Equipment described in the Proposal and in submittal data (if such data is issued in connection with the order). Company may rely on the acceptance of the Proposal and submittal data as acceptance of the suitability of the Equipment for the particular project or location. Unless specifically stated in the Proposal, compliance with any local building codes or other laws or regulations relating to specifications or the location, use or operation of the Equipment is the sole responsibility of Customer. If Equipment is tendered that does not fully comply with the provisions of this Agreement and Equipment is rejected by Customer, Company will have the right to cure within a reasonable time after notice thereof by substituting a conforming tender whether or not the time for performance has passed.

**7. Force Majeure.** Company's duty to perform under this Agreement and the Equipment prices are contingent upon the non-occurrence of an Event of Force Majeure. If the Company shall be 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 Work 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; tornado; storm; fire; civil disobedience; pandemic insurrections; riots; labor/labour disputes; labor/labour or material shortages; 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.

**8. Limited Warranty.** Company warrants the Equipment manufactured by Company for a period of the lesser of 12 months from initial start-up or 18 months from date of shipment, whichever is less, against failure due to defects in material and manufacture and that it has the capacities and ratings set forth in Company's catalogs and bulletins ("Warranty"). **Equipment manufactured by Company that includes required start-up and sold in North America will not be warranted by Company unless Company performs the Equipment startup.** Exclusions from this Warranty include damage or failure arising from: wear and tear; corrosion, erosion, deterioration; modifications made by others to the Equipment; repairs or alterations by a party other than Company that adversely affects the stability or reliability of the Equipment; vandalism; neglect; accident; adverse weather or environmental conditions; abuse or improper use; improper installation; commissioning by a party other than Company; unusual physical or electrical or mechanical stress; operation with any accessory, equipment or part not specifically approved by Company; refrigerant not supplied by Company; and/or lack of proper maintenance as recommended by Company. Company shall not be obligated to pay for the cost of lost refrigerant or lost product. Company's obligations and liabilities under this Warranty are limited to furnishing replacement equipment or parts, at its option, FCA (Incoterms 2000) factory or warehouse (f.o.b. factory or warehouse for US domestic purposes) at Company-designated shipping point, freight-allowed to Company's warranty agent's stock location, for all non-conforming Company-manufactured Equipment (which have been returned by Customer to Company). Returns must have prior written approval by Company and are subject to restocking charge where applicable. 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. COMPANY MAKES NO REPRESENTATION OR WARRANTY OF ANY KIND, INCLUDING WARRANTY OF MERCHANTABILITY OR FITNESS FOR PARTICULAR PURPOSE. ADDITIONALLY, COMPANY MAKES NO REPRESENTATION OR WARRANTY OF ANY KIND 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.** No warranty liability whatsoever shall attach to Company until Customer's complete order has been paid for in full and Company's liability under this Warranty shall be limited to the purchase price of the Equipment shown to be defective. Additional warranty protection is available on an extra-cost basis and must be in writing and agreed to by an authorized signatory of the Company. **EXCEPT FOR COMPANY'S WARRANTY EXPRESSLY SET FORTH HEREIN, COMPANY DOES NOT MAKE, AND HEREBY EXPRESSLY DISCLAIMS, ANY WARRANTIES, EXPRESS OR IMPLIED CONCERNING ITS PRODUCTS, EQUIPMENT OR SERVICES, INCLUDING, WITHOUT LIMITATION, ANY WARRANTY OF DESIGN, MERCHANTABILITY OR OF FITNESS FOR A PARTICULAR PURPOSE, OR OTHERS THAT ARE ALLEGED TO ARISE FROM COURSE OF DEALING OR TRADE.**

**9. Indemnity.** To the fullest extent permitted by law, Company and Customer shall indemnify, defend 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 their 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. If the parties are both at fault, the obligation to indemnify shall be proportional to their relative fault. The duty to indemnify will continue in full force and effect, notwithstanding the expiration or early termination hereof, with respect to any claims based on facts or conditions that occurred prior to expiration or termination.

**10. Insurance.** Upon request, Company will furnish evidence of its standard insurance coverage. 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 waive any rights of subrogation.

11. **Customer Breach.** Each of the following events or conditions shall constitute a breach by Customer and shall give Company the right, without an election of remedies, to terminate this Agreement, require payment prior to shipping, or suspend performance by delivery of written notice: (1) Any failure by Customer to pay amounts when due; (2) any general assignment by Customer for the benefit of its creditors, or if Customer becomes bankrupt or insolvent or takes the benefit of any statute for bankrupt or insolvent debtors, or makes or proposes to make any proposal or arrangement with creditors, or if any steps are taken for the winding up or other termination of Customer or the liquidation of its assets, or if a trustee, receiver, or similar person is appointed over any of the assets or interests of Customer; (3) Any representation or warranty furnished by Customer in connection with this Agreement is false or misleading in any material respect when made; or (4) Any failure by Customer to perform or comply with any material provision of this Agreement. Customer shall be liable to the Company for all Equipment furnished and all damages sustained by Company (including lost profit and overhead).

12. **Limitation of Liability.** NOTWITHSTANDING ANYTHING TO THE CONTRARY, IN NO EVENT SHALL COMPANY BE LIABLE FOR ANY SPECIAL, INCIDENTAL, INDIRECT CONSEQUENTIAL, PUNITIVE, EXEMPLARY DAMAGES (INCLUDING WITHOUT LIMITATION REFRIGERANT LOSS, BUSINESS INTERRUPTION, LOST DATA, LOST REVENUE, LOST PROFITS), OR CONTAMINANTS LIABILITIES, EVEN IF A PARTY HAS BEEN ADVISED OF SUCH POSSIBLE DAMAGES OR IF SAME WERE REASONABLY FORESEEABLE AND REGARDLESS OF WHETHER THE CAUSE OF ACTION IS FRAMED IN CONTRACT, NEGLIGENCE, ANY OTHER TORT, WARRANTY, STRICT LIABILITY, OR PRODUCT LIABILITY. In no event will Company's liability in connection with the provision of products or services or otherwise under this Agreement exceed the entire amount paid to Company by Customer under this Agreement.

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, MITIGATION, ELIMINATION, OR CONTAMINATION THEREOF) (COLLECTIVELY, "CONTAMINANTS LIABILITIES") AND CUSTOMER HEREBY EXPRESSLY RELEASES COMPANY FROM ANY SUCH CONTAMINANTS LIABILITIES.

14. **Nuclear Liability.** In the event that the Equipment sold hereunder is to be used in a nuclear facility, Customer will, prior to such use, arrange for insurance or governmental indemnity protecting Company against all liability and hereby releases and agrees to indemnify Company and its suppliers for any nuclear damage, including loss of use, in any manner arising out of a nuclear incident, whether alleged to be due, in whole or in part to the negligence or otherwise of Company or its suppliers.

15. **Intellectual Property; Patent Indemnity.** Company retains all ownership, license and other rights to all patents, trademarks, copyrights, trade secrets and other intellectual property rights related to the Equipment, and, except for the right to use the Equipment sold, Customer obtains no rights to use any such intellectual property. Company agrees to defend any suit or proceeding brought against Customer so far as such suit or proceeding is solely based upon a claim that the use of the Equipment provided by Company constitutes infringement of any patent of the United States of America, provided Company is promptly notified in writing and given authority, information and assistance for defense of same. Company will, at its option, procure for Customer the right to continue to use said Equipment, or modify it so that it becomes non-infringing, or replace same with non-infringing Equipment, or to remove said Equipment and to refund the purchase price. The foregoing will not be construed to include any Agreement by Company to accept any liability whatsoever in respect to patents for inventions including more than the Equipment furnished hereunder, or in respect of patents for methods and processes to be carried out with the aid of said Equipment. The provision of Equipment by Company does not convey any license, by implication, estoppel, or otherwise, under patent claims covering combinations of said Equipment with other devices or elements. The foregoing states the entire liability of Company with regard to patent infringement. Notwithstanding the provisions of this paragraph, Customer will hold Company harmless against any expense or loss resulting from infringement of patents or trademarks arising from compliance with Customer's designs or specifications or instructions.

16. **Cancellation.** Equipment is specially manufactured in response to orders. An order placed with and accepted by Company cannot be delayed, canceled, suspended, or extended except with Company's written consent and upon written terms accepted by Company that will reimburse Company for and indemnify Company against loss and provide Company with a reasonable profit for its materials, time, labor, services, use of facilities and otherwise. Customer will be obligated to accept any Equipment shipped, tendered for delivery or delivered by Company pursuant to the order prior to any agreed delay, cancellation, suspension or extension of the order. Any attempt by Customer to unilaterally revoke, delay or suspend acceptance for any reason whatever after it has agreed to delivery of or accepted any shipment shall constitute a breach of this Agreement. For purposes of this paragraph, acceptance occurs by any waiver of inspection, use or possession of Equipment, payment of the invoice, or any indication of exclusive control exercised by Customer.

17. **Invoicing and Payment.** Unless otherwise agreed to in writing by Company, equipment shall be invoiced to Customer upon tender of delivery thereof to the carrier. Customer shall pay Company's invoices within net 30 days of shipment date. 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. Customer shall pay all costs (including attorneys' fees) incurred by Company in attempting to collect amounts due and otherwise enforcing these terms and conditions. If requested, Company will provide appropriate lien waivers upon receipt of payment. Company may at any time decline to ship, make delivery or perform work except upon receipt of cash payment, letter of credit, or security, or upon other terms and conditions satisfactory to Company. Customer agrees that, unless Customer makes payment in advance, Company will have a purchase money security interest in all Equipment to secure payment in full of all amounts due Company and its order for the Equipment, together with these terms and conditions, form a security agreement (as defined by the UCC in the United States and as defined in the Personal Property Security Act in Canada). Customer shall keep the Equipment free of all taxes and encumbrances, shall not remove the Equipment from its original installation point and shall not assign or transfer any interest in the Equipment until all payments due Company have been made. The purchase money security interest granted herein attaches upon Company's acceptance of Customer's order and on receipt of the Equipment described in the accepted Proposal but prior to its installation. The parties have no agreement to postpone the time for attachment unless specifically noted in writing on the accepted order. Customer will have no rights of set off against any amounts, which become payable to Company under this Agreement or otherwise.

18. **Claims.** Company will consider claims for concealed shortages in shipments or rejections due to failure to conform to an order only if such claims or rejections are made in writing within 15 days of delivery and are accompanied by the packing list and, if applicable, the reasons in detail why the Equipment does not conform to Customer's order. Upon receiving authorization and shipping instructions from authorized personnel of Company, Customer may return rejected Equipment, transportation charges prepaid, for replacement. Company may charge Customer any costs resulting from the testing, handling, and disposition of any Equipment returned by Customer which are not found by Company to be nonconforming. All Equipment damaged during shipment and all claims relating thereto must be made with the freight carrier in accordance with such carrier's policies and procedures. Claims for Equipment damaged during shipment are not covered under the warranty provision stated herein.

19. **Export Laws.** The obligation of Company to supply Equipment 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 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 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.

20. **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 of New York for Equipment shipped to a U.S. location and the laws of the province to which Equipment is shipped within Canada, without regard to its conflict of law principles that might otherwise call for the application of a different state's or province's law, and not including the United Nations Convention on Contracts for the International Sale of Goods. Any action or suit arising out of or related to this Agreement must be commenced within one year after the cause of action has accrued. To the extent the Equipment is being used at a site owned and/or operated by any agency of the Federal Government, determination of any substantive issue of law shall be according to the Federal common law of Government contracts as enunciated and applied by Federal judicial bodies and boards of contract appeals of the 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 subject matter hereof. This Agreement may not be amended, modified or terminated except by a writing signed by the parties hereto. No documents shall be incorporated herein by reference except to the extent Company is a signatory thereon. If any term or condition of this Agreement is invalid, illegal or incapable of being enforced by any rule of law, all other terms and conditions 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, or its right, title or interest herein, without the written consent of the Company. Subject to the foregoing, this Agreement shall be binding upon and inure to the benefit of Customer's 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.

21. **Equal Employment Opportunity/Affirmative Action Clause.** Company is a federal contractor that complies fully with Executive Order 11246, as amended, and the applicable regulations contained in 41 C.F.R. Parts 60-1 through 60-60, 29 U.S.C. Section 793 and the applicable regulations contained in 41 C.F.R. Part 60-741; and 38

U.S.C. Section 4212 and the applicable regulations contained in 41 C.F.R. Part 60-250 Executive Order 13496 and Section 29 CFR 471, appendix A to subpart A, regarding the notice of employee rights in the United States and with Canadian Charter of Rights and Freedoms Schedule B to the Canada Act 1982 (U.K.) 1982, c. 11 and applicable Provincial Human Rights Codes and employment law in Canada.

**22. U.S. Government Work.**

The following provision applies only to direct sales by Company to the US Government. The Parties acknowledge that Equipment 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).

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; 52.222-28; 52.222-35; 52.222-36; 52.222-39; 52.247-64. If the sale of the Equipment is 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 work that is the subject of the Proposal or this Agreement, other than the Proposal or this Agreement.

**23. 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.

1-26.130-4 (0622)  
Supersedes 1-26.130-4(1221b)

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. 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.

November 2023

Model Number Description		75009901	REV E
Voyager 2 Digits 1-17			
Digit 1 Unit Type Y= Gas/Electric T= Cooling W= Heat pump	Digit 12,13 Service Sequence	Digit 14 Fresh Air Selection 0= No Fresh Air A= Manual damper D= Econ Dry Bulb w/ barometric relief F= Econ Reference Enthaply with barometric relief H= Econ Comparative Enthaply with barometric relief K= Low Leak Econ Dry Bulb with barometric relief M= Low Leak Econ Reference Enthaply with barometric relief P= Low Leak Econ Comparative Enthaply with barometric relief	
Digit 2 Efficiency S= Standard H= High Z= Ultra High	Digit 15 Supply Fan/Drive Type/Motor 0= Standard Drive 1= Oversized Motor 3= High Efficiency Belt Drive 6= Single Zone Variable Air Volume Standard 7= Two Speed Standard 8= Single Zone Variable Air Volume Oversized 9= Two Speed Oversized A= Single Zone Variable Air Volume Standard with Shaft Ground Ring B= Two Speed Standard w/ Shaft Ground Ring C= Single Zone Variable Air Volume Oversized with Shaft Ground Ring D= Two Speed Oversized w/ Shaft Ground Ring E= VAV Supply Air Temperature Control - Standard F= VAV Supply Air Temperature Control - Oversized G= VAV Supply Air Temperature Control - Standard w/ Shaft Ground Ring H= VAV Supply Air Temperature Control - Oversized w/ Shaft Ground Ring		
Digit 3 Airflow D= Downflow H= Horizontal	Digit 7 Major Design Sequence E= R-410a F= Micro-channel G= ASHRAE 90.1		
Digit 4,5,6 Unit Tonnage 150= 12.5 Ton 155= 15 Ton 50 hz 175= 17.5 Ton 50 hz 180= 15 Ton 200= 20 Ton 50 hz 210= 17.5 Ton 240= 20 Ton 250= 25 Ton 50 hz 300= 25 Ton	Digit 8 Voltage Selection 3= 230/60/3 4= 460/60/3 D= 380-415/50/3 K= 380/60/3 T= 200/50/3 W= 575/60/3		
Digit 9 Unit Controls R= Reliatel	Digit 10 Heating Capacity 0= No Heat G= 18 kW electric heat K= 27 kW electric heat N= 36 kW electric heat P= 54 kW electric heat R= 72 kW electric heat H= Gas Heat - High L= Gas Heat - Low V= Gas Heat - Modulating X= Gas Heat - SS Ht Ex - Low Z= Gas Heat - SS Ht Ex - High	Digit 16 Hinged Service Access / Filters 0= Standard panels/standard filters A= Hinged access/standard filters B= Standard panels/2" inch pleated filters C= Hinged access/2" inch pleated filters D= Standard panels/MERV 13 filters E= Hinged access/MERV 13 filters	
Digit 11 Minor Design Sequence A= Minor Des. Seq.	Digit 17 Condenser Coil Protection 0= Standard coil 1= Standard coil with hail guard 2= Epoxy Coated Condenser Coil 3= Epoxy Coated Condenser Coil and Hail Guard 4= ECoated Coil 5= ECoated Coil with Hail Guard		

MODEL NUMBER DESCRIPTION DIGIT 1-17 PARTS LIST

Parts List Number :VOY1000#VOY2UP1

Model Number :YSD300F4RLA030000C10000000000000000000000



# Trane Precedent Packaged Rooftop

## Unit Overview - YSJ300A4SAL\*\*F000C101000000000000000000

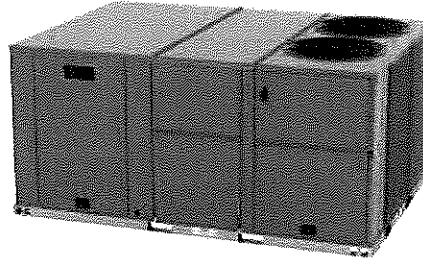
Application	Unit Size	Supply Fan		External Dimensions (in.)			Operating Weight	EER	IEER/SEER	Elevation
		Airflow	Total Static Pressure	Height	Width	Length				
DX Cooling / Gas Heat	25 Ton	10000 cfm	0.965 In H2O	4.92 ft	7.25 ft	10.25 ft	2213.0 lb	9.80	13.00	0.00 ft

### Unit Features

Unit Efficacy	Standard Efficiency
Refrigerant	R-410A
Through the Base Provisions	Electric and Gas
Disconnect / Circuit Breaker	Non-Fused Disconnect Switch
Fresh Air Selection	Economizer, Reference Enthalpy with BR

### Unit Electrical

Voltage/phase/hertz	460/60/3
MCA	59.00 A
MOP	80.00 A
Condenser Fan FLA	2.20 A
Evaporator Fan FLA	4.60 A
Compressor 1 RLA	23.90 A
Compressor 2 RLA	14.40 A
Compressor Power	20.22 kW
System Power	27.84 kW



### Controls

Unit Controls	Symblo 700
Communications Option	Advanced Controls and BACnet BAS

### Cooling Section

Entering Dry Bulb	80.00 F	Capacity	
Entering Wet Bulb	67.00 F		
Ambient Temp	95.00 F		
Leaving Coil Dry Bulb	58.98 F		
Leaving Coil Wet Bulb	57.91 F		
Leaving Unit Dry Bulb	60.60 F		
Leaving Unit Wet Bulb	58.56 F		
Saturated Discharge Temperature	121.82 F		
Saturated Suction Temperature	49.68 F		
			Gross Total
		Gross Latent	63.70 MBh
		Gross Sensible	218.48 MBh
		Net Total	270.42 MBh
		Net Sensible	206.72 MBh
		Net Sensible Heat Ratio	76.00 %
		Fan Motor Heat	5.16 MBh
		Refrig Charge-Circuit 1	16.9 lb

### Heating Section

Heat Type	Stainless Steel Gas Heat
Heating Low Gas Heat	
Input Heating Capacity	250.00 MBh
Output Heating Capacity	202.50 MBh
Heating EAT	65.00 F
Heating LAT	83.62 F
Heating Temp Rise	18.62 F

### Fan Section

Indoor Fan Data		Indoor Fan Performance		
Airflow Application	Downflow	Airflow	10000 cfm	
Design ESP	0.500 in H2O	Supply Motor Horsepower	3.000 hp	
Component SP	0.485 in H2O	Indoor Motor Operating Power	4.630 hp	
Heat SP	-0.019 in H2O	Indoor RPM	1547 rpm	
Total SP	0.965 in H2O	Outdoor Fan Data		
Indoor Fan Drive Type	Variable Direct	Outdoor Fan Drive Type	Direct	
Indoor Fan Quantity	2.00 Number	Outdoor Fan Quantity	2	
Indoor Fan Type	BC Plenum	Outdoor Fan Type	Propeller	
		Filters		
		1st Filter Size and Qty		8 - 20 x 24 x 2



**Field Installed Accessories**

Economizer Conversion Kit None  
 Symbio Adv Controls and BACnet Conv Kit None

**Acoustics**

Sound Path	63 Hz	125 Hz	250 Hz	500 Hz	1 kHz	2 kHz	4 kHz	8 kHz
Ducted Discharge	87 dB	95 dB	83 dB	75 dB	71 dB	67 dB	67 dB	65 dB
Ducted Inlet	81 dB	85 dB	78 dB	75 dB	72 dB	68 dB	66 dB	62 dB
Outdoor Noise	94 dB	91 dB	93 dB	91 dB	88 dB	83 dB	81 dB	76 dB

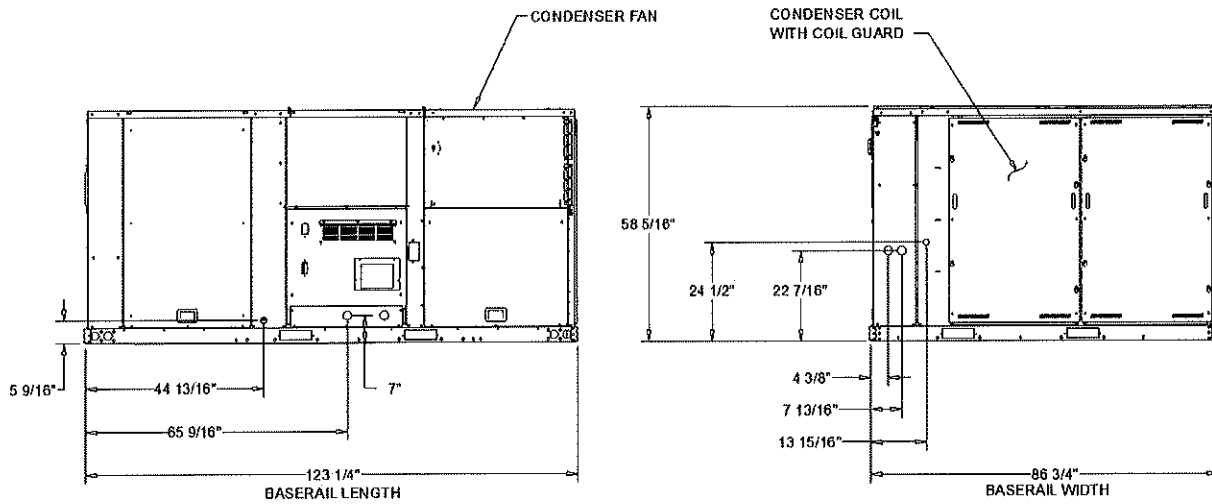
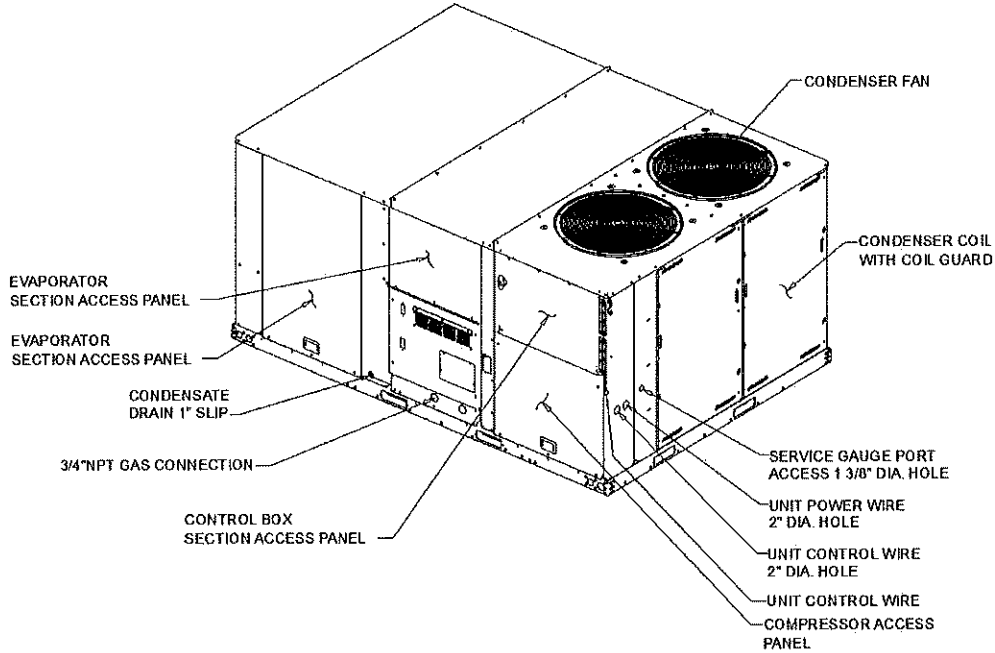
Note: Ducted Discharge/Ducted Inlet prediction data conform to AHR1 260

**Warranty**

Parts less compressor warranty, 4th-5th yr parts less compr warranty

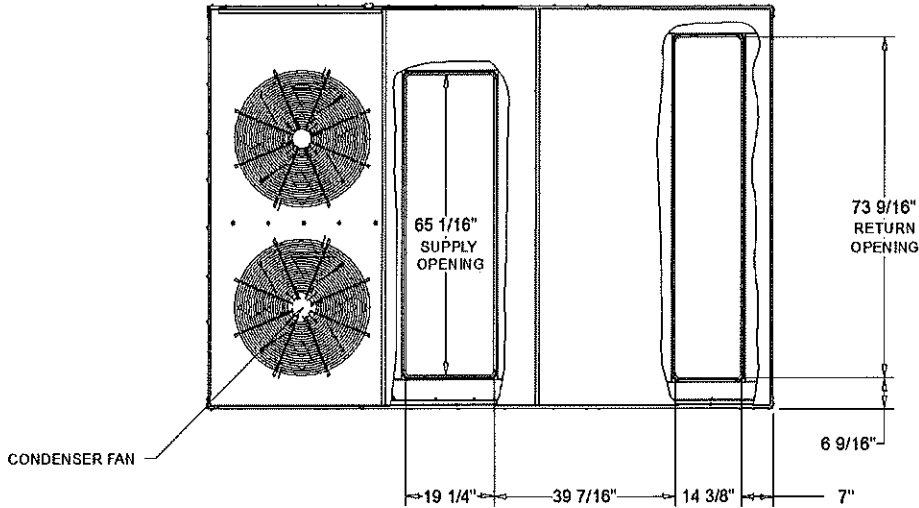


- NOTES:  
 1. THRU-THE-BASE ELECTRICAL IS NOT STANDARD ON ALL UNITS.  
 2. VERIFY WEIGHTS, CONNECTIONS, AND ALL DIMENSIONS WITH INSTALLER DOCUMENTS BEFORE INSTALLATION



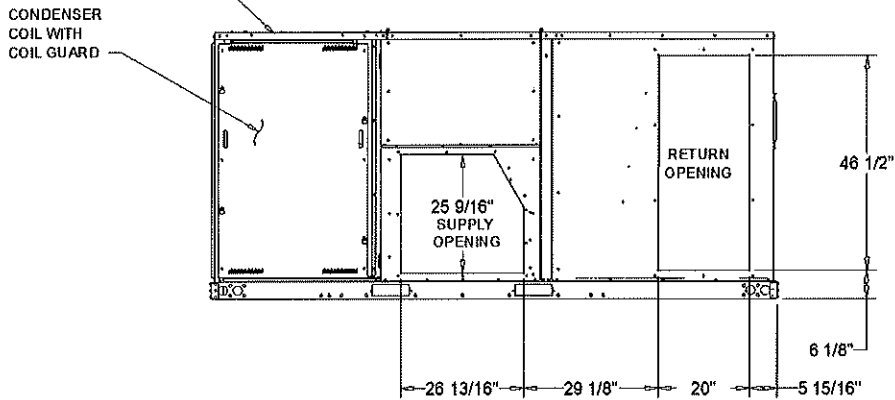
DX COOLING / GAS HEAT STANDARD EFFICIENCY

DIMENSION DRAWING



CONDENSER FAN

PLAN VIEW OF DOWNFLOW OPENINGS



HORIZONTAL AIR FLOW OPENING

DX COOLING / GAS HEAT STANDARD EFFICIENCY

DIMENSION DRAWING



- NOTES:  
1. APPROX. INSTALLED WEIGHT INCLUDES ALL SELECTED OPTIONS AND ACCESSORIES.  
2. CORNER WEIGHTS ARE FOR BASE UNIT ONLY AND DO NOT INCLUDE OPTIONS OR ACCESSORIES.  
3. WEIGHT INCLUDES BOTH FACTORY AND FIELD INSTALLED ACCESSORY.

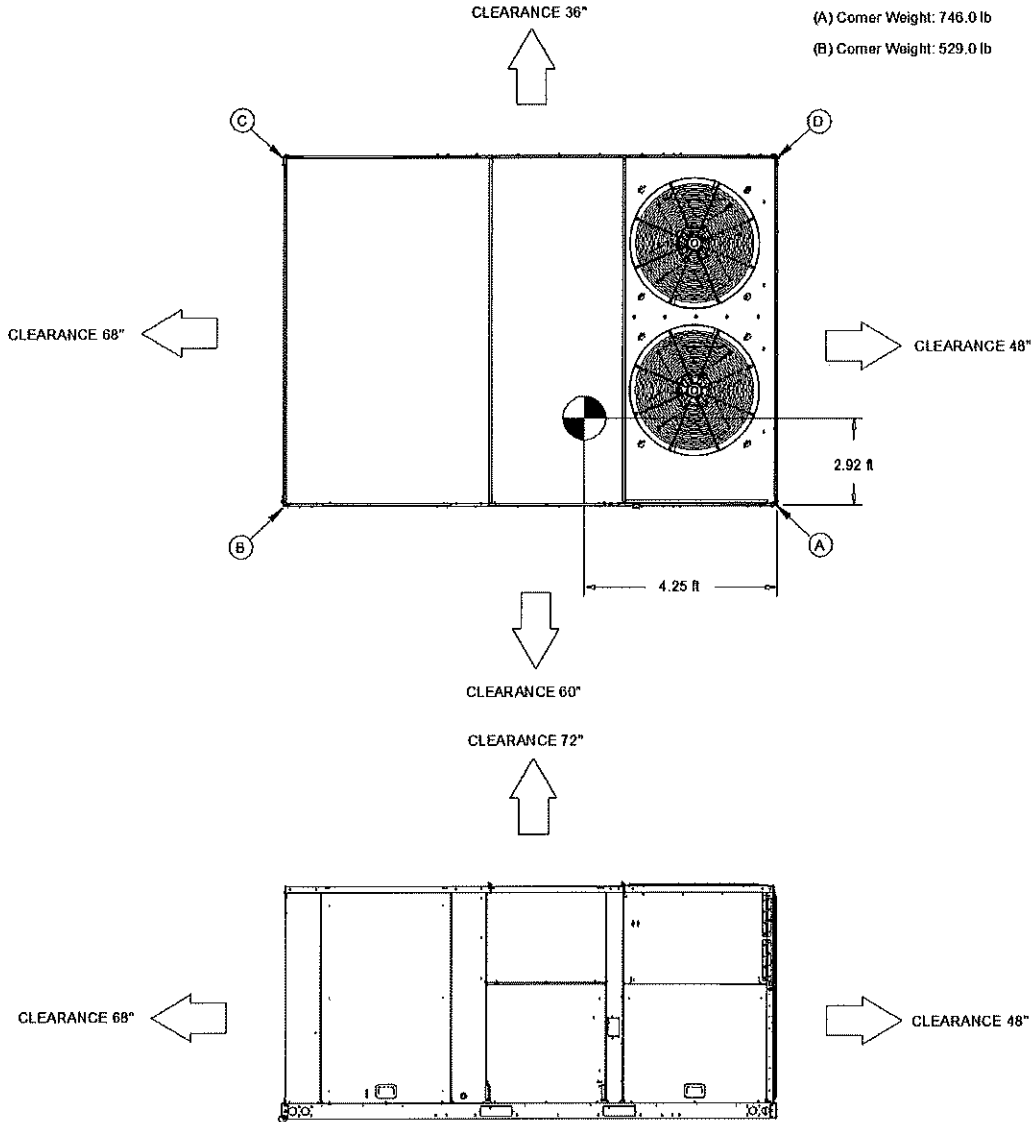
Approximate Installed Weight: 2,213.0 lb

(A) Corner Weight: 746.0 lb

(C) Corner Weight: 363.0 lb

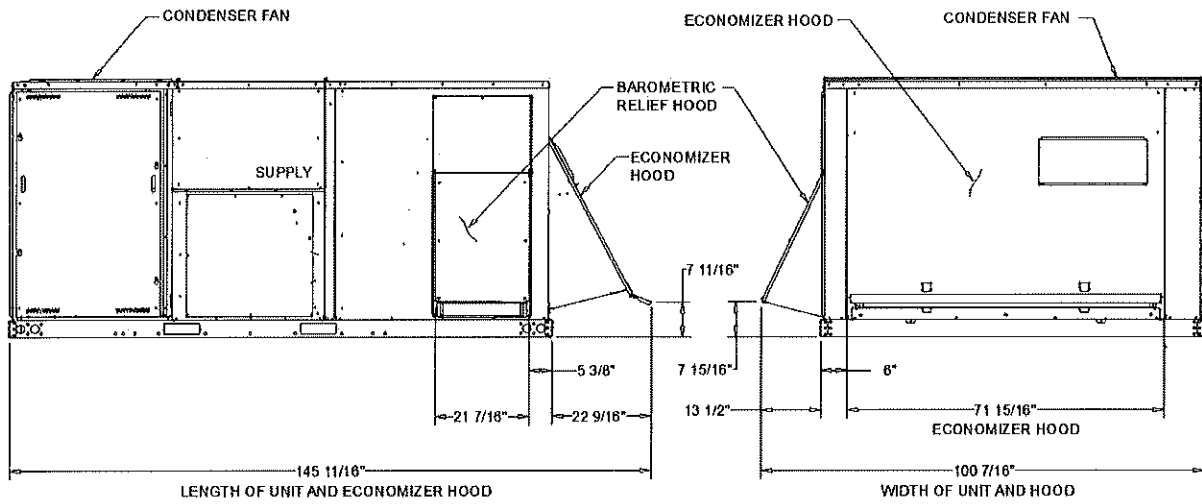
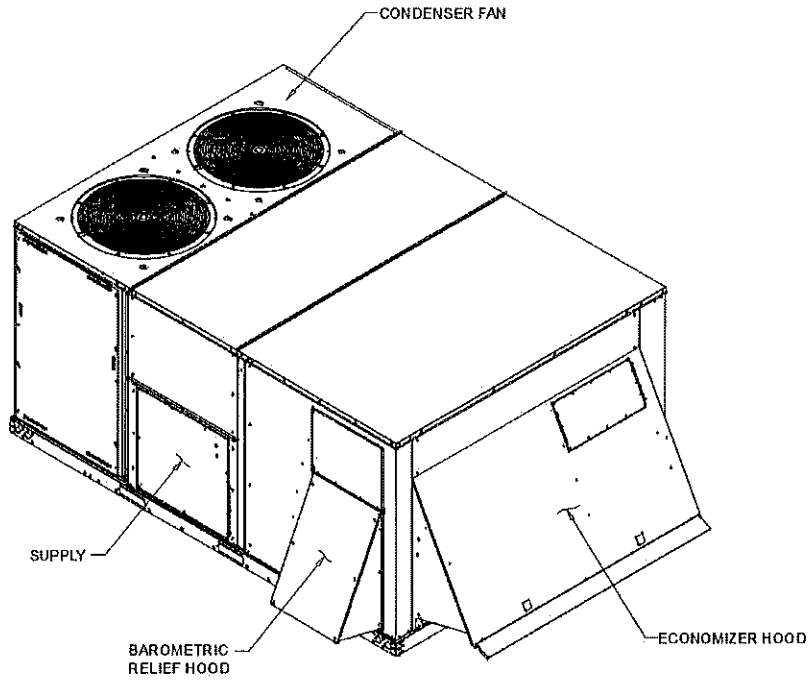
(B) Corner Weight: 529.0 lb

(D) Corner Weight: 512.0 lb



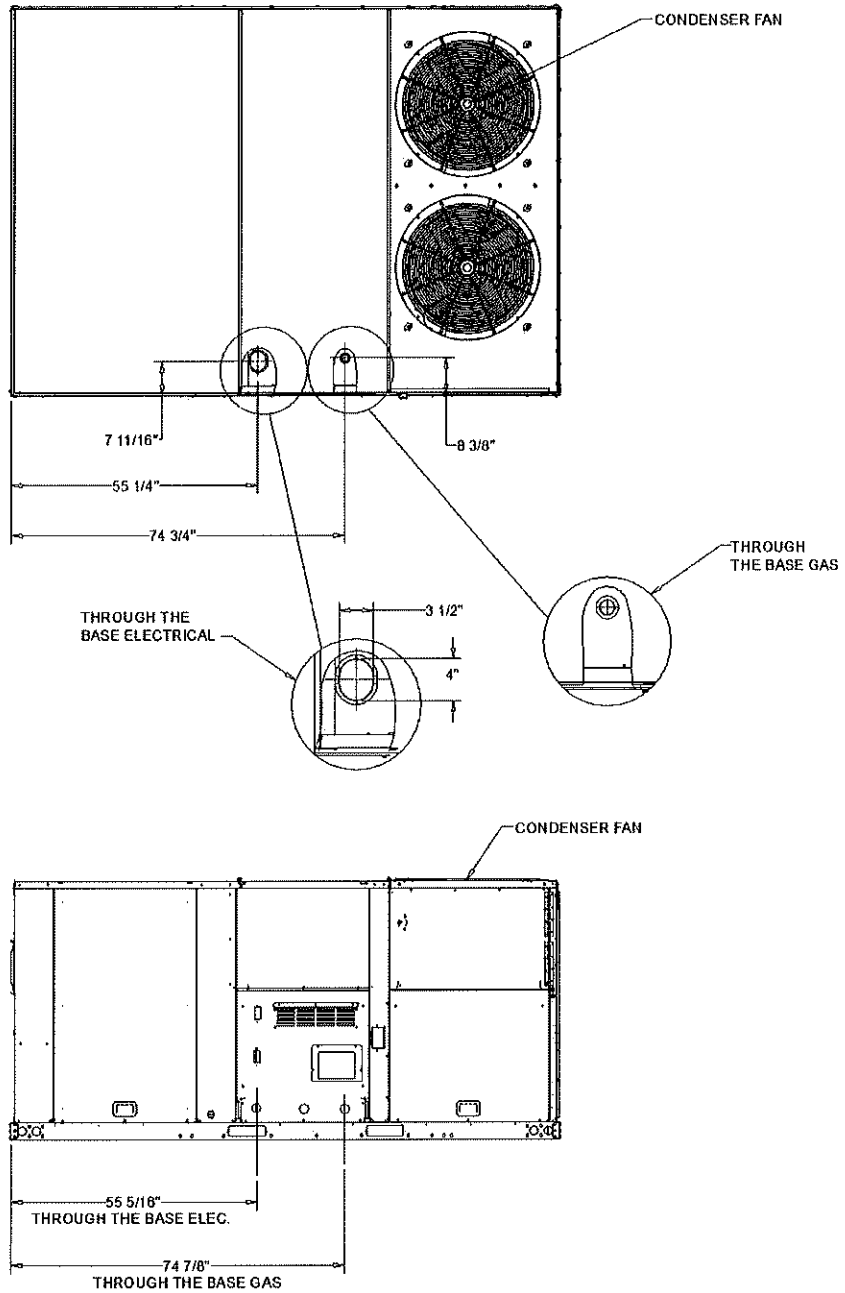
DX COOLING / GAS HEAT STANDARD EFFICIENCY

WEIGHTS AND CLEARANCES



ECONOMIZER AND BAROMETIC AIR DAMPER(S) (OPTION)

DX COOLING / GAS HEAT STANDARD EFFICIENCY

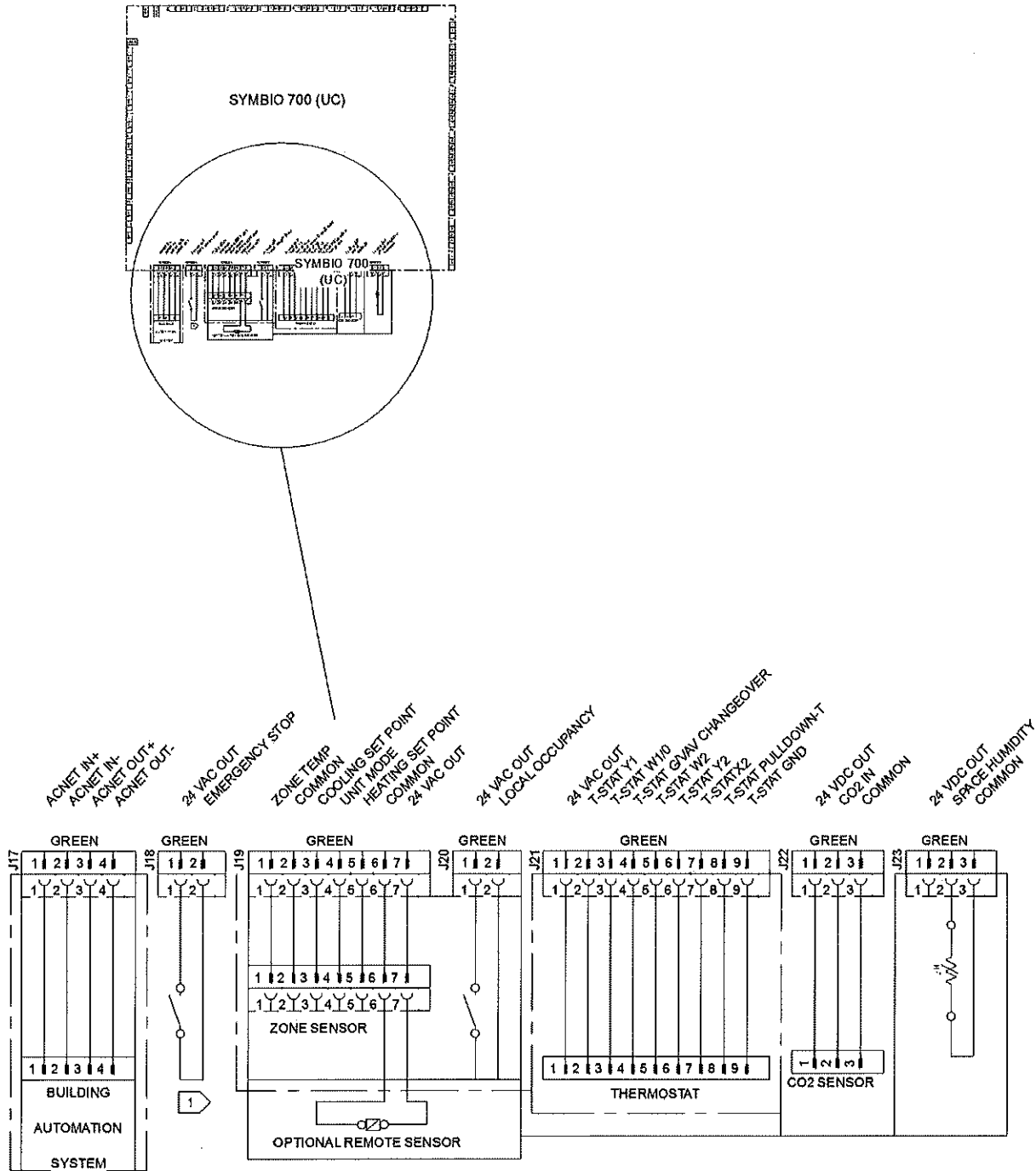


**THROUGH-THE-BASE ELECTRICAL AND GAS (OPTION)**

DX COOLING / GAS HEAT STANDARD EFFICIENCY



NOTES:  
 1. VERIFY WEIGHT, CONNECTION, AND ALL DIMENSION WITH  
 INSTALLER DOCUMENTS BEFORE INSTALLATION



SYMBIO 700 (J17, J18, J19, J20, J21, J22, AND J23)

FIELD WIRING DRAWING



## General

- Packaged rooftop units cooling, heating capacities, and efficiencies are AHRI Certified within scope of AHRI Standard 210-240 for 6 to 25 Tons and ANSIZ21.47 and 10 CFR Part 431 pertaining to Commercial Warm Air Furnaces (all gas heating units).
- Convertible airflow.
- Symbio controls operating range is from 0-125.0 F from factory; if designing for cooling mode operation below 40.0 F ambient temp, add low ambient kit to assure continuous and reliable operation.
- Factory assembled, internally wired, fully charged with R-410A, and 100 percent run tested to check cooling operation, fan and blower rotation, and control sequence before leaving the factory.
- Colored and numbered wiring internal to the unit for simplified identification.
- Units cULus listed and labeled, classified in accordance for Central Cooling Air Conditioners.

## Casing

- Zinc coated, heavy gauge, galvanized steel.
- Weather resistant pre-painted metal with galvanized substrate.
- Meets ASTM B117, 672 hour salt spray test.
- Removable single side maintenance access panels.
- Lifting handles in maintenance access panels (can be removed and reinstalled by removing fasteners while providing a water and air tight seal).
- Exposed vertical panels and top covers in the indoor air section insulated with a cleanable foil-faced, fire-retardant permanent, odorless glass fiber material.
- Base pan shall have no penetrations within the perimeter of the curb other than the raised 1 inch high downflow supply/return openings to provide an added water integrity precaution, if the condensate drain backs up.
- Base of the unit insulated with 1/8 inch, foil-faced, closed-cell insulation.
- Unit base provisions for forklift and/or crane lifting on three sides of unit.

## Hail Guards

- Provides condenser coil protection.

## Microchannel Coils

- Optimal heat transfer performance due to flat, streamlined tubes with small ports, and metallurgical tube-to-fin bond.
- Reduce system refrigerant charge by up to 50% leading to better compressor reliability.
- Compact all-aluminum microchannel coils reduce the unit weight.
- Recyclable all aluminum coils All aluminium construction minimizes galvanic corrosion.
- Strong aluminum brazed structure provides better fin protection.
- Flat streamlined tubes more dust resistant and easy to clean.
- Coils leak tested at the factory to ensure the pressure integrity.

## Compressors

- All units have direct-drive, hermetic, scroll type compressors with centrifugal type oil pumps.
- Suction gas-cooled motor with voltage utilization range of plus or minus 10 percent of unit nameplate voltage.
- Internal overloads standard with scroll compressors.
- All units have dual compressors.
- Three stages of cooling available on 6 to 17.5 tons units and four stages of cooling available on 20 and 25 tons units.

## Filters

- Two inch standard filters shall be factory supplied on all units.

## Frostat

- Utilized as a safety device.
- Opens to prevent freezing temperatures on evaporator coil.
- Temperature will need to rise to 50°F before closing.
- Utilized in low airflow or high outside air applications (cooling only).



### **Gas Heating Section**

- The heating section shall have a progressive tubular heat exchanger with corrosion-resistant aluminized steel tubes and burners as standard on all models.
- Stainless steel heat exchanger with 409 stainless steel tubes and 439 stainless steel burners shall be optional.
- Induced draft combustion blower shall be used to pull the combustion products through the firing tubes.
- Heater shall use a direct spark ignition (DSI) system.
- On initial call for heat, the combustion blower shall purge the heat exchanger for 20 seconds before ignition.
- After three unsuccessful ignition attempts, entire heating system shall be locked out until manually reset at the thermostat/zone sensor.
- Units shall be suitable for use with natural gas or propane (field-installed kit).

### **Indoor Fan**

- Direct drive plenum fan design - 6 to 25 tons units.
- Plenum fan design - backward-curved fan wheel along with an external rotor direct drive variable speed indoor motor.
- Supply fan speed adjustments can be made using the Symbio 700 or Mobile App.
- Motors are thermally protected.
- Variable speed direct drive motors are high efficiency - 6 to 25 tons.

### **Heat Exchanger**

- Compact cabinet features a tubular heat exchanger in low, medium and high heat capacities.
- Corrosion-resistant aluminized steel tubes and burners are standard on all models.
- Induced draft blower to pull the gas mixture through the burner tubes.
- Direct spark ignition and a flame sensor as a safety device to validate the flame.

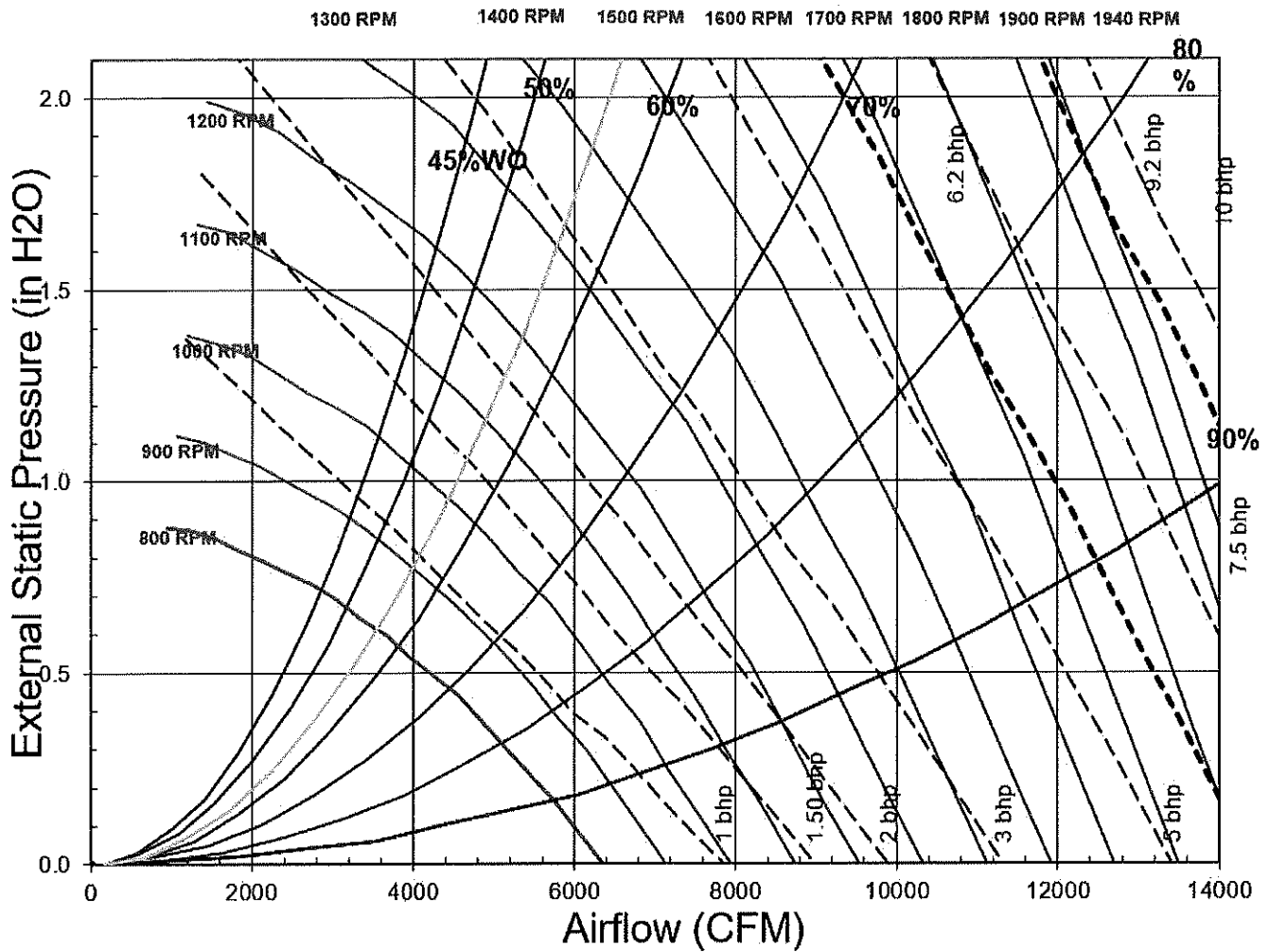
### **Stainless Steel Heat Exchanger**

- Thermal magnetic, molded case, HACR circuit breaker with provisions for through-the-base electrical connections.
- Circuit breaker installed within unit in water tight enclosure.
- Wiring provided from the switch to the unit high voltage terminal block.
- Circuit breaker will provide overcurrent protection, sized per NEC and cULus guidelines, and agency recognized by cULus.

### **Economizer (Standard)**

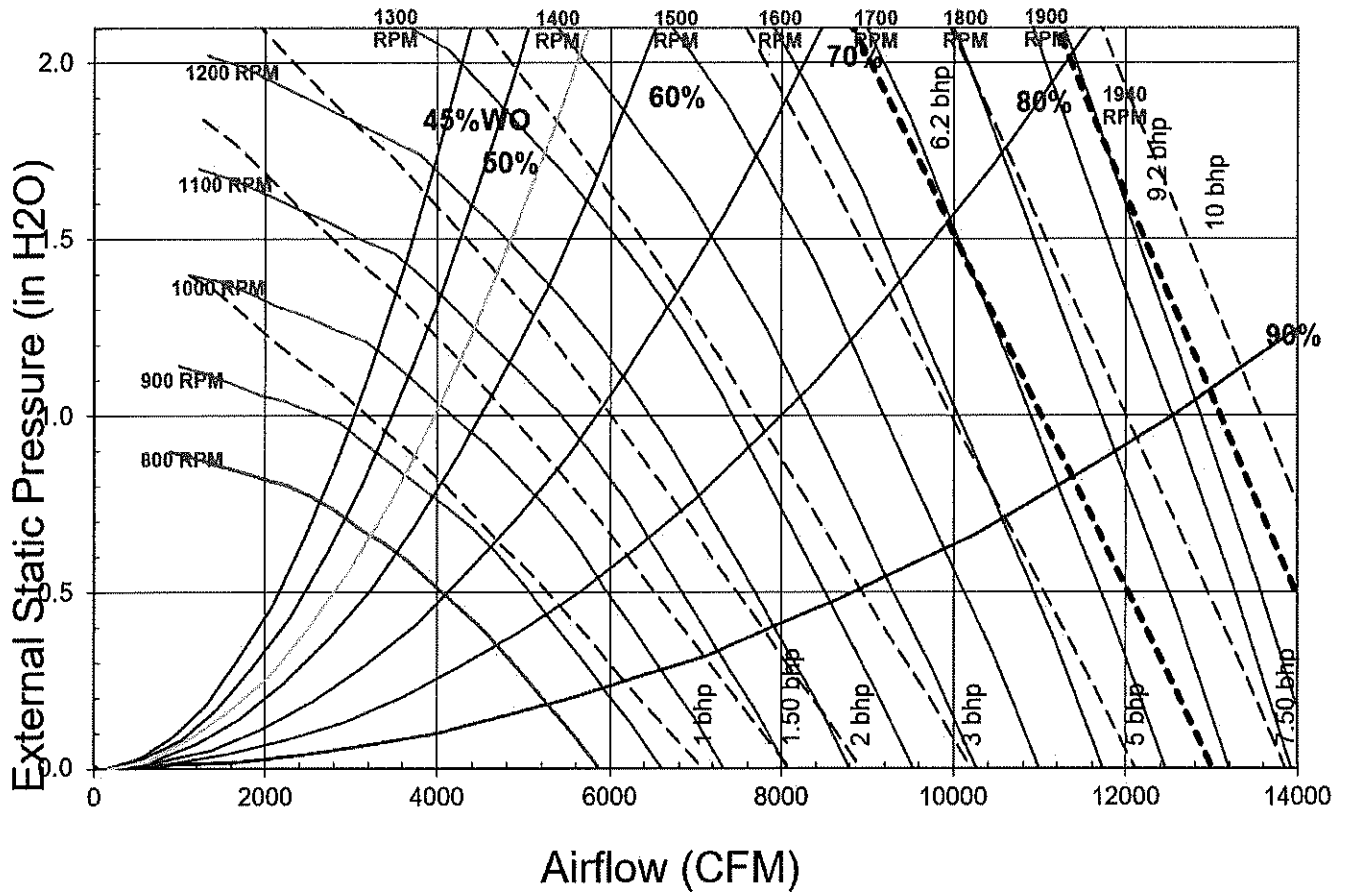
- Available with or without barometric relief.
- Fully modulating 0-100 percent motor and dampers, minimum position setting, preset linkage, wiring harness with plug, spring return actuator and fixed dry bulb control.
- Barometric relief shall provide a pressure operated damper that shall be gravity closing.
- Barometric relief shall prohibit entrance of outside air during the equipment "off" cycle.
- Optional solid state or differential enthalpy control.
- Arrives in shipping position and shall be moved to the operating position by the installing contractor.

# TSJ180-300\*, Downflow, Std Filter, Wet Coil, Cooling Only



Note: Fan Curves are for TSJ/WSJ units. For YSJ units, add additional static pressure for Gas Heat Exchanger (ref. RT-PRC098\*, table 47)

TSJ180-300\*, Horizontal, Std Filter, Wet Coil, Cooling Only



Note: Fan Curves are for TSJ/WSJ units. For YSJ units, add additional static pressure for Gas Heat Exchanger (ref. RT-PRC098\*, table 47)

Model Number Description	75009902 <span style="border: 1px solid black; padding: 2px;">REV E</span>
<p>Voyager 2            Digits 18-31</p>	
<p>Digit 18 Through The Base Provisions            0= No through the base provisions            A= Through the base electric            B= Through the base gas            C= Through the base electric and gas            D= Through the base access</p>	<p>Digit 25 System Monitoring Controls            0= No monitoring controls            1= Clogged filter switch            2= Fan failure switch            3= Discharge air sensing            4= Clogged filter switch and fan failure            5= Clogged switch and discharge air sensing            6= Fan failure switch and discharge air sensing            7= Clogged filter switch, fan failure switch and discharge air sensing            8= NOVAR Return Air Sensor (Novar 2024)            9= NOVAR Zone Temp Sensor (Novar 3051)</p>
<p>Digit 19 Disconnect Switch/ Circuit Breaker            0= No Disconnect, circuit break, phase monitor            1= Unit Mount Non-Fused and Disconnect Switch            2= Unit Mount Circuit Breaker            3= Phase Monitor            4= Phase Monitor and Disconnect            5= Phase Monitor and Circuit Breaker</p>	<p>A= Condensate Overflow Switch            B= Condensate Overflow Switch and Clogged filter switch            C= Condensate Overflow Switch and Fan Fail            D= Condensate Overflow Switch and Discharge Air            E= Condensate Overflow Switch and Clogged filter switch, Fan Fail            F= Condensate Overflow Switch and Clogged filter switch, Discharge Air            G= Condensate Overflow Switch and Fan Fail, Discharge Air            H= Condensate Overflow Switch, Clogged Filter, Fan Fail, Discharge Air</p>
<p>Digit 20 Convenience Outlet Option            0= Without Convenience Outlet            A= Convenience Outlet Unpowered (FIELD)            B= Convenience Outlet Powered (FACTORY)</p>	<p>Digit 26 System Monitoring Controls            0= No monitoring controls            A= Demand Control Ventilation            B= Fault Detection Device            C= Demand Control Ventilation and Fault Detection Device</p>
<p>Digit 21 Communications Options            0= Without Communications Options            1= Trane Communications Interface            2= Lontalk Communications Interface            3= Novar 2024 Controls Interface            4= Novar 3051 Controls Interface            5= Novar 3051 Communications Interface with Demand Control Ventilation            6= Building Automation Control Network Communications Interface            7= Wireless Building Automation Control Network Communications Interface</p>	<p>Digit 27 Stainless Steel Drain pan            0= No stainless Drain pan            1= Stainless Steel Drain pan</p>
<p>Digit 22 Refrigeration System Option            0= Standard refrigeration system            A= Thermal Expansion Valve (TXV)            B= Dehumidification (hot gas reheat)</p>	<p>Digit 28 Short Circuit Current Rating (SCCR)            0= Standard            A= 65kA</p>
<p>Digit 23 Refrigeration Controls            0= Without Refrigeration Controls            1= Froststat            2= Crankcase Heater            3= Froststat and Crankcase Heater            4= High Pressure Control            5= High Pressure Control and Froststat            6= High Pressure and Crankcase Heater            7= High Pressure, Crankcase Heater, Froststat</p>	<p>Digit 29,30 Reserved For Future            0= Standard</p>
<p>Digit 24 Smoke Detector            0= Without Smoke Detector            A= Return Air Smoke Detector            B= Supply Air Smoke Detector            C= Return/Supply Air Smoke Detector</p>	<p>Digit 31 Unit Controls            0= Standard</p>



# Proposal

Proposal is valid for 15 days.

Customer must obtain credit approval and release order to production within 60 days of proposal date.

**PROPRIETARY AND CONFIDENTIAL PROPERTY OF Trane U.S. Inc.  
DISTRIBUTION TO OTHER THAN THE NAMED RECIPIENT IS PROHIBITED**

**Prepared For:** Oak Ridge Schools  
Attn: Allen Thacker

**Date:** August 30, 2024

**Job Name:**  
Oak Ridge Schools SAB Superintendent

**Proposal Number:** J1-73161-11171-1  
**COOP or Federal Contract ID:** OMNIA Racine #3341

**Delivery Terms:**  
Freight Allowed and Prepaid - F.O.B. Factory

**Payment Terms:** Net 30 Days

Trane U.S. Inc. is pleased to provide the following proposal for your review and approval.

**Tag Data - 6- 25 Ton PKGD Precedent Unitary Rooftops (Qty: 1)**

Item	Tag(s)	Qty	Description	Model Number
A1	PREC-1	1	7.5 Ton PKGD Precedent Unitary Rooftop	YSJ090A3SAM**F

**Product Data - 6- 25 Ton PKGD Precedent Unitary Rooftops**

**Item: A1 Qty: 1 Tag(s): PREC-1**

- DX Cooling / Gas Heat
- Standard Efficiency
- R-410A
- 7.5 Ton
- 208-230/60/3
- Symbio 700
- Stainless Steel Gas Heat
- Medium Gas Heat
- Economizer, Reference Enthalpy with Barometric Relief
- 3-year parts, coils & controls warranty
- 5-year compressor parts only warranty
- 15-year stainless steel heat exchanger
- 6-10th year whole unit parts
- 4th-5th yr parts less compr warranty

Total Net Price (Excluding Sales Tax) ..... \$ 12,480.00

Tax Status: Taxable <input checked="" type="checkbox"/> Exempt <input checked="" type="checkbox"/>	IF EXEMPT PLEASE SUBMIT COMPLETED TAX EXEMPTION CERTIFICATE WITH YOUR SIGNED PROPOSAL OR WITH YOUR PURCHASING DOCUMENTS, KEEP YOUR ORIGINAL ON FILE IN THE OFFICE. YOU WILL BE CHARGED TAX IF A VALID EXEMPTION CERTIFICATE IS NOT ON FILE BEFORE EQUIPMENT, PARTS OR SERVICES ARE PROVIDED. SEE <a href="http://WWW.TAXSITES.COM/STATE-LINKS.HTML">WWW.TAXSITES.COM/STATE-LINKS.HTML</a> FOR TAX FORMS.
---	--

Sincerely,

**Michael McDowell**  
**Trane U.S. Inc.**  
5220 Middlebrook Pike S.  
Knoxville, TN 37921  
Office Phone: (865) 588-0607  
Fax: (865) 588-0600

**This proposal is subject to your acceptance of the attached Trane terms and conditions.**

CUSTOMER ACCEPTANCE	TRANE ACCEPTANCE
Oak Ridge Schools _____ Company Name	Trane U.S. Inc. _____
_____ Authorized Representative	_____ Authorized Representative
_____ Printed Name	Michael McDowell _____ Printed Name
_____ Title	_____ Title
Purchase Order _____	
Acceptance Date _____	Signature Date _____

**TERMS AND CONDITIONS - COMMERCIAL EQUIPMENT**

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

1. **Acceptance.** These terms and conditions 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 sale of the described commercial equipment and any ancillary services (the "Equipment"). COMPANY'S TERMS AND CONDITIONS AND EQUIPMENT PRICES ARE SUBJECT TO PERIODIC CHANGE OR AMENDMENT. 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 15 days from the date of the Proposal. Prices in the Proposal are subject to change at any time upon notice to Customer. 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 Company's 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 provide Equipment in accordance with the Proposal and the Company's terms and conditions. If Customer does not reject or object in writing to Company within 10 days, Company's counteroffer will be deemed accepted. Notwithstanding anything to the contrary herein, Customer's acceptance of the Equipment 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.

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. **Title and Risk of Loss.** All Equipment sales with destinations to Canada or the U.S. shall be made as follows: FOB Company's U.S. manufacturing facility or warehouse (full freight allowed). Title and risk of loss or damage to Equipment will pass to Customer upon tender of delivery of such to carrier at Company's U.S. manufacturing facility or warehouse.

4. **Pricing and Taxes.** Within forty-five (45) days following Customer acceptance of the Proposal without addition of any other terms and conditions of sale or any modification, Customer shall provide notification of release for immediate production at Company's factory. Prices for Equipment are subject to change at any time prior to shipment to reflect any cost increases related to the manufacture, supply, and shipping of Equipment. 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. If shipment is delayed due to Customer's actions, Company may also charge Customer with storage fees. If a release is not received within 6 months following order acceptance, Company reserves the right to cancel any order. Company shall be entitled to equitable adjustments in the contract price to reflect any cost increases as set forth above and will provide notice to Customer prior to the date for which the increased price is to be in effect for the applicable customer contract. In no event will prices be decreased. The price of Equipment does not include any present or future foreign, federal, state, or local property, license, privilege, sales, use, excise, value added, gross receipts or other like taxes or assessments. Such amounts will be itemized separately to Customer, who will make prompt payment to Company. Company will accept valid exemption documentation for such taxes and assessments from Customer, if applicable. All prices include packaging in accordance with Company's standard procedures. Charges for special packaging, crating or packing are the responsibility of Customer.

5. **Delivery and Delays.** Delivery dates are approximate and not guaranteed. Company will use commercially reasonable efforts to deliver the Equipment on or before the estimated delivery date, will notify Customer if the estimated delivery dates cannot be honored, and will deliver the Equipment and services as soon as practicable thereafter. In no event will Company be liable for any damages or expenses caused by delays in delivery.

6. **Performance.** Company shall be obligated to furnish only the Equipment described in the Proposal and in submittal data (if such data is issued in connection with the order). Company may rely on the acceptance of the Proposal and submittal data as acceptance of the suitability of the Equipment for the particular project or location. Unless specifically stated in the Proposal, compliance with any local building codes or other laws or regulations relating to specifications or the location, use or operation of the Equipment is the sole responsibility of Customer. If Equipment is tendered that does not fully comply with the provisions of this Agreement and Equipment is rejected by Customer, Company will have the right to cure within a reasonable time after notice thereof by substituting a conforming tender whether or not the time for performance has passed.

7. **Force Majeure.** Company's duty to perform under this Agreement and the Equipment prices are contingent upon the non-occurrence of an Event of Force Majeure. If the Company shall be 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 Work 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; tornado; storm; fire; civil disobedience; pandemic insurrections; riots; labor/labour disputes; labor/labour or material shortages; 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.

8. **Limited Warranty.** Company warrants the Equipment manufactured by Company for a period of the lesser of 12 months from initial start-up or 18 months from date of shipment, whichever is less, against failure due to defects in material and manufacture and that it has the capacities and ratings set forth in Company's catalogs and bulletins ("Warranty"). **Equipment manufactured by Company that includes required start-up and sold in North America will not be warranted by Company unless Company performs the Equipment startup.** Exclusions from this Warranty include damage or failure arising from: wear and tear; corrosion, erosion, deterioration; modifications made by others to the Equipment; repairs or alterations by a party other than Company that adversely affects the stability or reliability of the Equipment; vandalism; neglect; accident; adverse weather or environmental conditions; abuse or improper use; improper installation; commissioning by a party other than Company; unusual physical or electrical or mechanical stress; operation with any accessory, equipment or part not specifically approved by Company; refrigerant not supplied by Company; and/or lack of proper maintenance as recommended by Company. Company shall not be obligated to pay for the cost of lost refrigerant or lost product. Company's obligations and liabilities under this Warranty are limited to furnishing replacement equipment or parts, at its option, FCA (Incoterms 2000) factory or warehouse (f.o.b. factory or warehouse for US domestic purposes) at Company-designated shipping point, freight-allowed to Company's warranty agent's stock location, for all non-conforming Company-manufactured Equipment (which have been returned by Customer to Company). Returns must have prior written approval by Company and are subject to restocking charge where applicable. 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. COMPANY MAKES NO REPRESENTATION OR WARRANTY OF ANY KIND, INCLUDING WARRANTY OF MERCHANTABILITY OR FITNESS FOR PARTICULAR PURPOSE. ADDITIONALLY, COMPANY MAKES NO REPRESENTATION OR WARRANTY OF ANY KIND 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.** No warranty liability whatsoever shall attach to Company until Customer's complete order has been paid for in full and Company's liability under this Warranty shall be limited to the purchase price of the Equipment shown to be defective. Additional warranty protection is available on an extra-cost basis and must be in writing and agreed to by an authorized signatory of the Company. **EXCEPT FOR COMPANY'S WARRANTY EXPRESSLY SET FORTH HEREIN, COMPANY DOES NOT MAKE, AND HEREBY EXPRESSLY DISCLAIMS, ANY WARRANTIES, EXPRESS OR IMPLIED CONCERNING ITS PRODUCTS, EQUIPMENT OR SERVICES, INCLUDING, WITHOUT LIMITATION, ANY WARRANTY OF DESIGN, MERCHANTABILITY OR OF FITNESS FOR A PARTICULAR PURPOSE, OR OTHERS THAT ARE ALLEGED TO ARISE FROM COURSE OF DEALING OR TRADE.**

9. **Indemnity.** To the fullest extent permitted by law, Company and Customer shall indemnify, defend 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 their 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. If the parties are both at fault, the obligation to indemnify shall be proportional to their relative fault. The duty to indemnify will continue in full force and effect, notwithstanding the expiration or early termination hereof, with respect to any claims based on facts or conditions that occurred prior to expiration or termination.

10. **Insurance.** Upon request, Company will furnish evidence of its standard insurance coverage. 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 waive any rights of subrogation.

**11. Customer Breach.** Each of the following events or conditions shall constitute a breach by Customer and shall give Company the right, without an election of remedies, to terminate this Agreement, require payment prior to shipping, or suspend performance by delivery of written notice: (1) Any failure by Customer to pay amounts when due; (2) any general assignment by Customer for the benefit of its creditors, or if Customer becomes bankrupt or insolvent or takes the benefit of any statute for bankrupt or insolvent debtors, or makes or proposes to make any proposal or arrangement with creditors, or if any steps are taken for the winding up or other termination of Customer or the liquidation of its assets, or if a trustee, receiver, or similar person is appointed over any of the assets or interests of Customer; (3) Any representation or warranty furnished by Customer in connection with this Agreement is false or misleading in any material respect when made; or (4) Any failure by Customer to perform or comply with any material provision of this Agreement. Customer shall be liable to the Company for all Equipment furnished and all damages sustained by Company (including lost profit and overhead).

**12. Limitation of Liability.** NOTWITHSTANDING ANYTHING TO THE CONTRARY, IN NO EVENT SHALL COMPANY BE LIABLE FOR ANY SPECIAL, INCIDENTAL, INDIRECT CONSEQUENTIAL, PUNITIVE, EXEMPLARY DAMAGES (INCLUDING WITHOUT LIMITATION REFRIGERANT LOSS, BUSINESS INTERRUPTION, LOST DATA, LOST REVENUE, LOST PROFITS), OR CONTAMINANTS LIABILITIES, EVEN IF A PARTY HAS BEEN ADVISED OF SUCH POSSIBLE DAMAGES OR IF SAME WERE REASONABLY FORESEEABLE AND REGARDLESS OF WHETHER THE CAUSE OF ACTION IS FRAMED IN CONTRACT, NEGLIGENCE, ANY OTHER TORT, WARRANTY, STRICT LIABILITY, OR PRODUCT LIABILITY. In no event will Company's liability in connection with the provision of products or services or otherwise under this Agreement exceed the entire amount paid to Company by Customer under this Agreement.

**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, MITIGATION, ELIMINATION, OR CONTAMINATION THEREOF) (COLLECTIVELY, "CONTAMINANTS LIABILITIES") AND CUSTOMER HEREBY EXPRESSLY RELEASES COMPANY FROM ANY SUCH CONTAMINANTS LIABILITIES.

**14. Nuclear Liability.** In the event that the Equipment sold hereunder is to be used in a nuclear facility, Customer will, prior to such use, arrange for insurance or governmental indemnity protecting Company against all liability and hereby releases and agrees to indemnify Company and its suppliers for any nuclear damage, including loss of use, in any manner arising out of a nuclear incident, whether alleged to be due, in whole or in part to the negligence or otherwise of Company or its suppliers.

**15. Intellectual Property; Patent Indemnity.** Company retains all ownership, license and other rights to all patents, trademarks, copyrights, trade secrets and other intellectual property rights related to the Equipment, and, except for the right to use the Equipment sold, Customer obtains no rights to use any such intellectual property. Company agrees to defend any suit or proceeding brought against Customer so far as such suit or proceeding is solely based upon a claim that the use of the Equipment provided by Company constitutes infringement of any patent of the United States of America, provided Company is promptly notified in writing and given authority, information and assistance for defense of same. Company will, at its option, procure for Customer the right to continue to use said Equipment, or modify it so that it becomes non-infringing, or replace same with non-infringing Equipment, or to remove said Equipment and to refund the purchase price. The foregoing will not be construed to include any Agreement by Company to accept any liability whatsoever in respect to patents for inventions including more than the Equipment furnished hereunder, or in respect of patents for methods and processes to be carried out with the aid of said Equipment. The provision of Equipment by Company does not convey any license, by implication, estoppel, or otherwise, under patent claims covering combinations of said Equipment with other devices or elements. The foregoing states the entire liability of Company with regard to patent infringement. Notwithstanding the provisions of this paragraph, Customer will hold Company harmless against any expense or loss resulting from infringement of patents or trademarks arising from compliance with Customer's designs or specifications or instructions.

**16. Cancellation.** Equipment is specially manufactured in response to orders. An order placed with and accepted by Company cannot be delayed, canceled, suspended, or extended except with Company's written consent and upon written terms accepted by Company that will reimburse Company for and indemnify Company against loss and provide Company with a reasonable profit for its materials, time, labor, services, use of facilities and otherwise. Customer will be obligated to accept any Equipment shipped, tendered for delivery or delivered by Company pursuant to the order prior to any agreed delay, cancellation, suspension or extension of the order. Any attempt by Customer to unilaterally revoke, delay or suspend acceptance for any reason whatever after it has agreed to delivery of or accepted any shipment shall constitute a breach of this Agreement. For purposes of this paragraph, acceptance occurs by any waiver of inspection, use or possession of Equipment, payment of the invoice, or any indication of exclusive control exercised by Customer.

**17. Invoicing and Payment.** Unless otherwise agreed to in writing by Company, equipment shall be invoiced to Customer upon tender of delivery thereof to the carrier. Customer shall pay Company's invoices within net 30 days of shipment date. 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. Customer shall pay all costs (including attorneys' fees) incurred by Company in attempting to collect amounts due and otherwise enforcing these terms and conditions. If requested, Company will provide appropriate lien waivers upon receipt of payment. Company may at any time decline to ship, make delivery or perform work except upon receipt of cash payment, letter of credit, or security, or upon other terms and conditions satisfactory to Company. Customer agrees that, unless Customer makes payment in advance, Company will have a purchase money security interest in all Equipment to secure payment in full of all amounts due Company and its order for the Equipment, together with these terms and conditions, form a security agreement (as defined by the UCC in the United States and as defined in the Personal Property Security Act in Canada). Customer shall keep the Equipment free of all taxes and encumbrances, shall not remove the Equipment from its original installation point and shall not assign or transfer any interest in the Equipment until all payments due Company have been made. The purchase money security interest granted herein attaches upon Company's acceptance of Customer's order and on receipt of the Equipment described in the accepted Proposal but prior to its installation. The parties have no agreement to postpone the time for attachment unless specifically noted in writing on the accepted order. Customer will have no rights of set off against any amounts, which become payable to Company under this Agreement or otherwise.

**18. Claims.** Company will consider claims for concealed shortages in shipments or rejections due to failure to conform to an order only if such claims or rejections are made in writing within 15 days of delivery and are accompanied by the packing list and, if applicable, the reasons in detail why the Equipment does not conform to Customer's order. Upon receiving authorization and shipping instructions from authorized personnel of Company, Customer may return rejected Equipment, transportation charges prepaid, for replacement. Company may charge Customer any costs resulting from the testing, handling, and disposition of any Equipment returned by Customer which are not found by Company to be nonconforming. All Equipment damaged during shipment and all claims relating thereto must be made with the freight carrier in accordance with such carrier's policies and procedures. Claims for Equipment damaged during shipment are not covered under the warranty provision stated herein.

**19. Export Laws.** The obligation of Company to supply Equipment 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 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 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.

**20. 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 of New York for Equipment shipped to a U.S. location and the laws of the province to which Equipment is shipped within Canada, without regard to its conflict of law principles that might otherwise call for the application of a different state's or province's law, and not including the United Nations Convention on Contracts for the International Sale of Goods. Any action or suit arising out of or related to this Agreement must be commenced within one year after the cause of action has accrued. To the extent the Equipment is being used at a site owned and/or operated by any agency of the Federal Government, determination of any substantive issue of law shall be according to the Federal common law of Government contracts as enunciated and applied by Federal judicial bodies and boards of contract appeals of the 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 subject matter hereof. This Agreement may not be amended, modified or terminated except by a writing signed by the parties hereto. No documents shall be incorporated herein by reference except to the extent Company is a signatory thereon. If any term or condition of this Agreement is invalid, illegal or incapable of being enforced by any rule of law, all other terms and conditions 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, or its right, title or interest herein, without the written consent of the Company. Subject to the foregoing, this Agreement shall be binding upon and inure to the benefit of Customer's 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.

**21. Equal Employment Opportunity/Affirmative Action Clause.** Company is a federal contractor that complies fully with Executive Order 11246, as amended, and the applicable regulations contained in 41 C.F.R. Parts 60-1 through 60-60, 29 U.S.C. Section 793 and the applicable regulations contained in 41 C.F.R. Part 60-741; and 38

U.S.C. Section 4212 and the applicable regulations contained in 41 C.F.R. Part 60-250 Executive Order 13496 and Section 29 CFR 471, appendix A to subpart A, regarding the notice of employee rights in the United States and with Canadian Charter of Rights and Freedoms Schedule B to the Canada Act 1982 (U.K.) 1982, c. 11 and applicable Provincial Human Rights Codes and employment law in Canada.

**22. U.S. Government Work.**

**The following provision applies only to direct sales by Company to the US Government.** The Parties acknowledge that Equipment 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).

**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 sale of the Equipment is 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 work that is the subject of the Proposal or this Agreement, other than the Proposal or this Agreement.

**23. 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.

1-26.130-4 (0622)  
Supersedes 1-26.130-4(1221b)

---

**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. 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.

November 2023



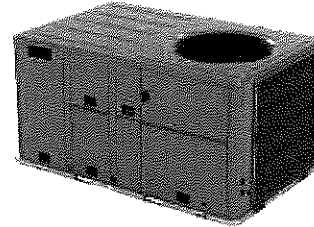
# Trane Precedent Packaged Rooftop

## Unit Overview - YSJ090A3SAM\*\*F0000000000000000000000000

Application	Unit Size	Supply Fan		External Dimensions (in.)			Operating Weight	EER	IEER/SEER	Elevation
		Airflow	Total Static Pressure	Height	Width	Length				
DX Cooling / Gas Heat	7.5 Ton	2475 cfm	0.737 in H2O	4.24 ft	4.44 ft	7.34 ft	1026.0 lb	11.00	14.60	0.00 ft

### Unit Features

Unit Efficiency: Standard Efficiency  
 Refrigerant: R-410A  
 Fresh Air Selection: Economizer, Reference Enthalpy with BR



### Unit Electrical

Voltage/phase/hertz: 208-230/60/3  
 MCA: 42.00 A  
 MOP: 50.00 A  
 Condenser Fan FLA: 3.30 A  
 Evaporator Fan FLA: 8.80 A  
 Compressor 1 RLA: 16.40 A  
 Compressor 2 RLA: 9.20 A  
 Compressor Power: 6.10 kW  
 System Power: 8.32 kW

### Controls

Unit Controls: Symblo 700

### Cooling Section

Entering Dry Bulb: 80.00 F	Capacity
Entering Wet Bulb: 67.00 F	Gross Total: 91.51 MBh
Ambient Temp: 95.00 F	Gross Latent: 25.50 MBh
Leaving Coil Dry Bulb: 55.32 F	Gross Sensible: 66.01 MBh
Leaving Coil Wet Bulb: 54.83 F	Net Total: 89.70 MBh
Leaving Unit Dry Bulb: 56.74 F	Net Sensible: 64.20 MBh
Leaving Unit Wet Bulb: 55.41 F	Net Sensible Heat Ratio: 71.57 %
Saturated Discharge Temperature: 116.14 F	Fan Motor Heat: 0.94 MBh
Saturated Suction Temperature: 49.58 F	Refrig Charge-Circuit 1: 9.0 lb

### Heating Section

Heat Type: Stainless Steel Gas Heat  
 Heating: Medium Gas Heat  
 Input Heating Capacity: 150.00 MBh  
 Output Heating Capacity: 121.50 MBh  
 Heating EAT: 68.00 F  
 Heating LAT: 112.79 F  
 Heating Temp Rise: 44.79 F  
 Heating Stages: 2

### Fan Section

Indoor Fan Data	Indoor Fan Performance
Airflow Application: Downflow	Airflow: 2475 cfm
Design ESP: 0.500 in H2O	Supply Motor Horsepower: 3.000 hp
Component SP: 0.109 in H2O	Indoor Motor Operating Power: 0.683 hp
Heat SP: 0.129 in H2O	Indoor RPM: 999 rpm
Total SP: 0.737 in H2O	Outdoor Fan Data
Indoor Fan Drive Type: Variable Direct	Outdoor Fan Drive Type: Direct
Indoor Fan Quantity: 1.00 Number	Outdoor Fan Quantity: 1
Indoor Fan Type: BC Plenum	Outdoor Fan Type: Propeller
	Filters
	1st Filter Size and Qty: 2 - 18 x 24 x 2
	2nd Filter Size and Qty: 3 - 24 x 16 x 2



**TRANE**

Job Name: Oak Ridge Schools SAB Superintendent  
Prepared For:  
Unit Tag: PREC-1  
Quantity: 1

**Field Installed Accessories**

Economizer Conversion Kit None  
Symbio Adv Controls and BACnet Conv Kit None

**Acoustics**

Sound Path	63 Hz	125 Hz	250 Hz	500 Hz	1 kHz	2 kHz	4 kHz	8 kHz
Ducted Discharge	80 dB	74 dB	72 dB	65 dB	60 dB	58 dB	57 dB	58 dB
Ducted Inlet	76 dB	68 dB	65 dB	55 dB	51 dB	49 dB	49 dB	49 dB
Outdoor Noise	85 dB	84 dB	84 dB	85 dB	82 dB	76 dB	73 dB	67 dB

Note:Ducted Discharge/Ducted Inlet prediction data conform to AHRI 260

**Warranty**

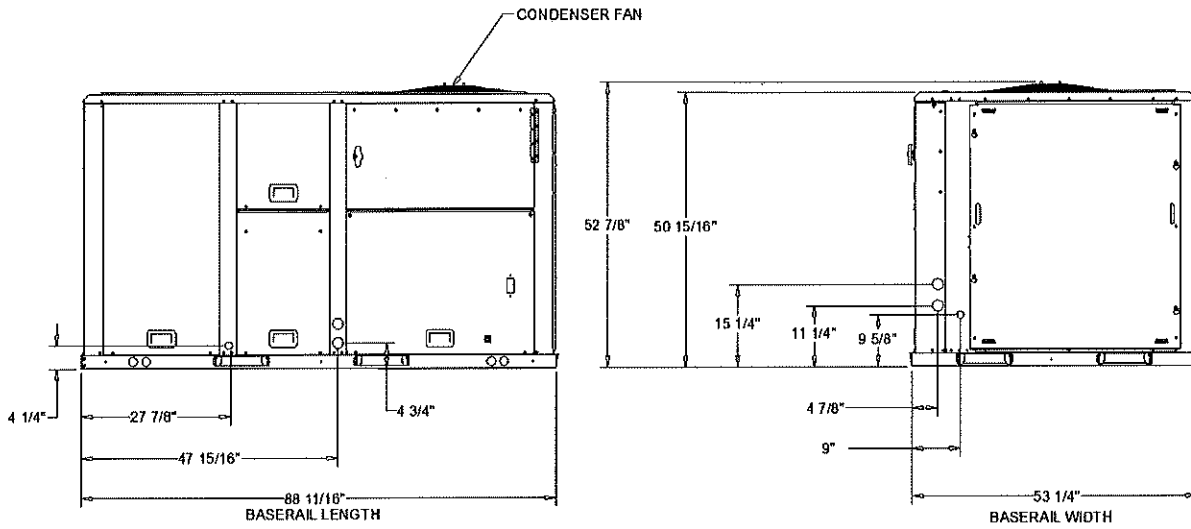
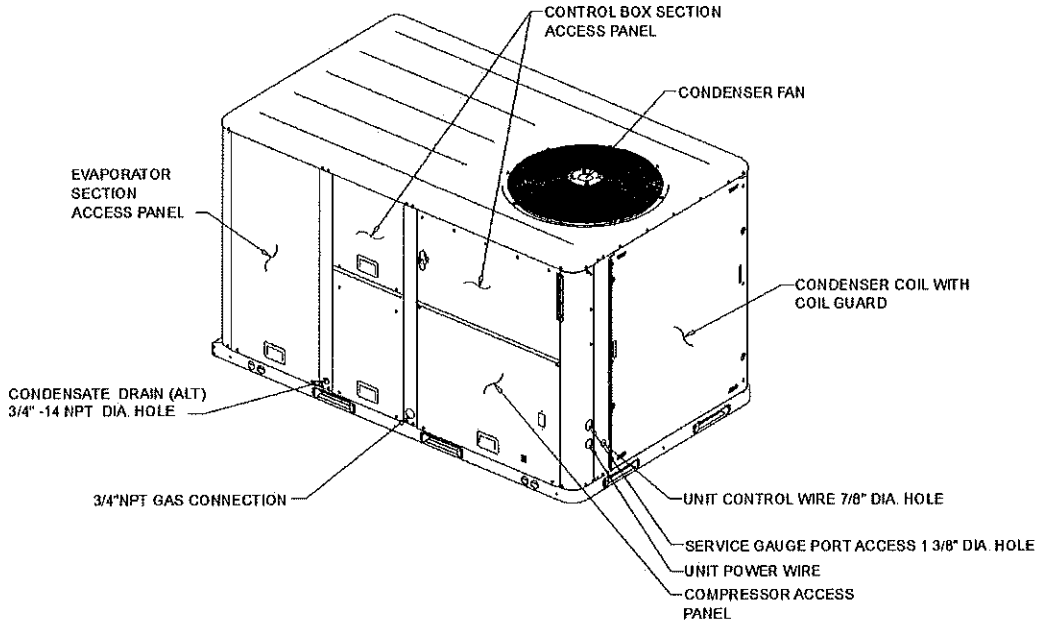
Parts less compressor warranty 4th-5th yr parts less compr warranty



**TRANE**

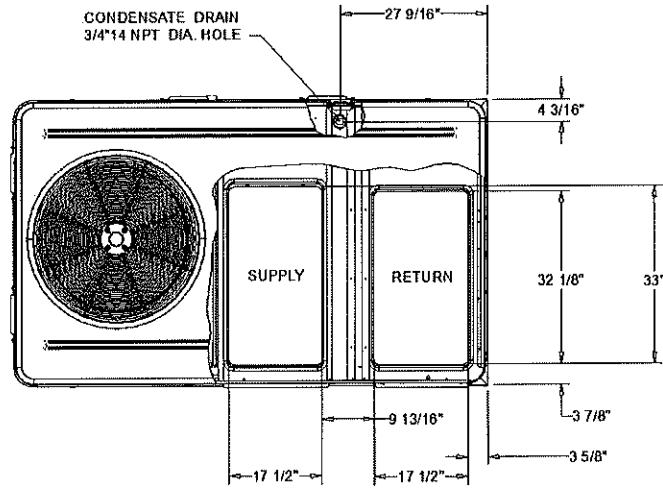
Job Name: Oak Ridge Schools SAB Superintendent  
Prepared For:  
Unit Tag: PREC-1  
Quantity: 1

NOTES:  
1. VERIFY WEIGHTS, CONNECTIONS, AND ALL DIMENSIONS WITH  
INSTALLER DOCUMENTS BEFORE INSTALLATION

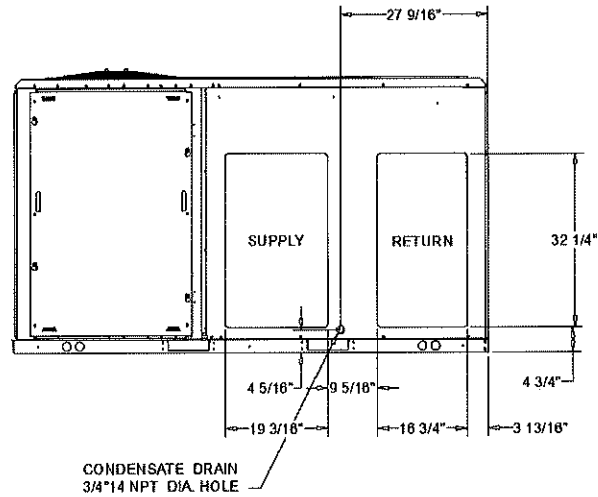


DX COOLING / GAS HEAT STANDARD EFFICIENCY

DIMENSION DRAWING



PLAN VIEW OF DOWNFLOW OPENINGS



HORIZONTAL AIR FLOW OPENING

DX COOLING / GAS HEAT STANDARD EFFICIENCY

DIMENSION DRAWING

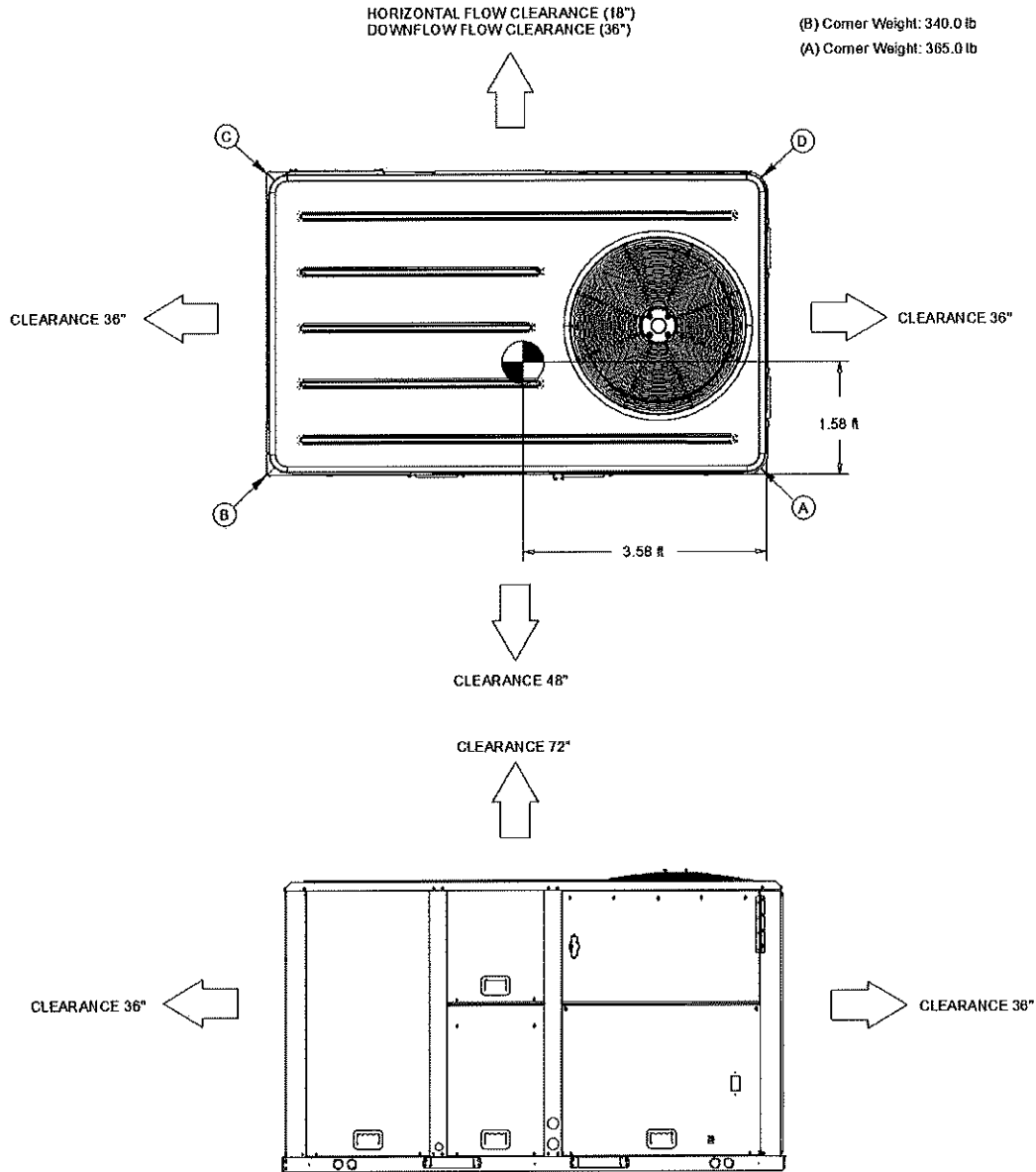


- NOTES:  
1. APPROX. INSTALLED WEIGHT INCLUDES ALL SELECTED OPTIONS AND ACCESSORIES.  
2. CORNER WEIGHTS ARE FOR BASE UNIT ONLY AND DO NOT INCLUDE OPTIONS OR ACCESSORIES.  
3. WEIGHT INCLUDES BOTH FACTORY AND FIELD INSTALLED ACCESSORY.

Approximate Installed Weight: 1,026.0 lb

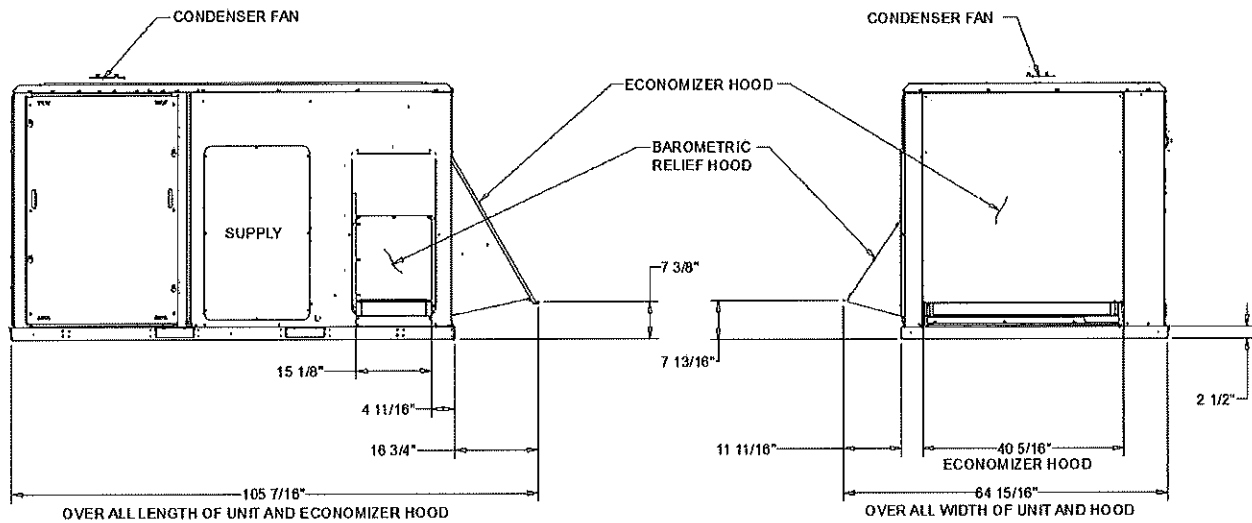
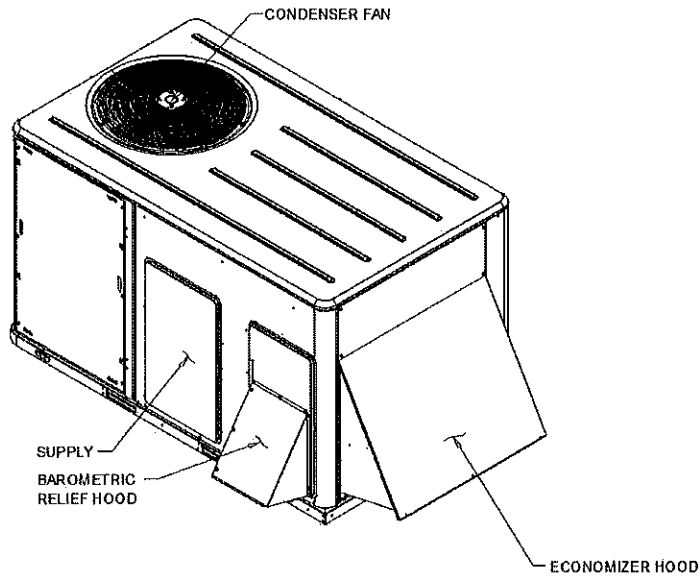
(B) Corner Weight: 340.0 lb  
(A) Corner Weight: 365.0 lb

(C) Corner Weight: 196.0 lb  
(D) Corner Weight: 210.0 lb



DX COOLING / GAS HEAT STANDARD EFFICIENCY

WEIGHTS AND CLEARANCES

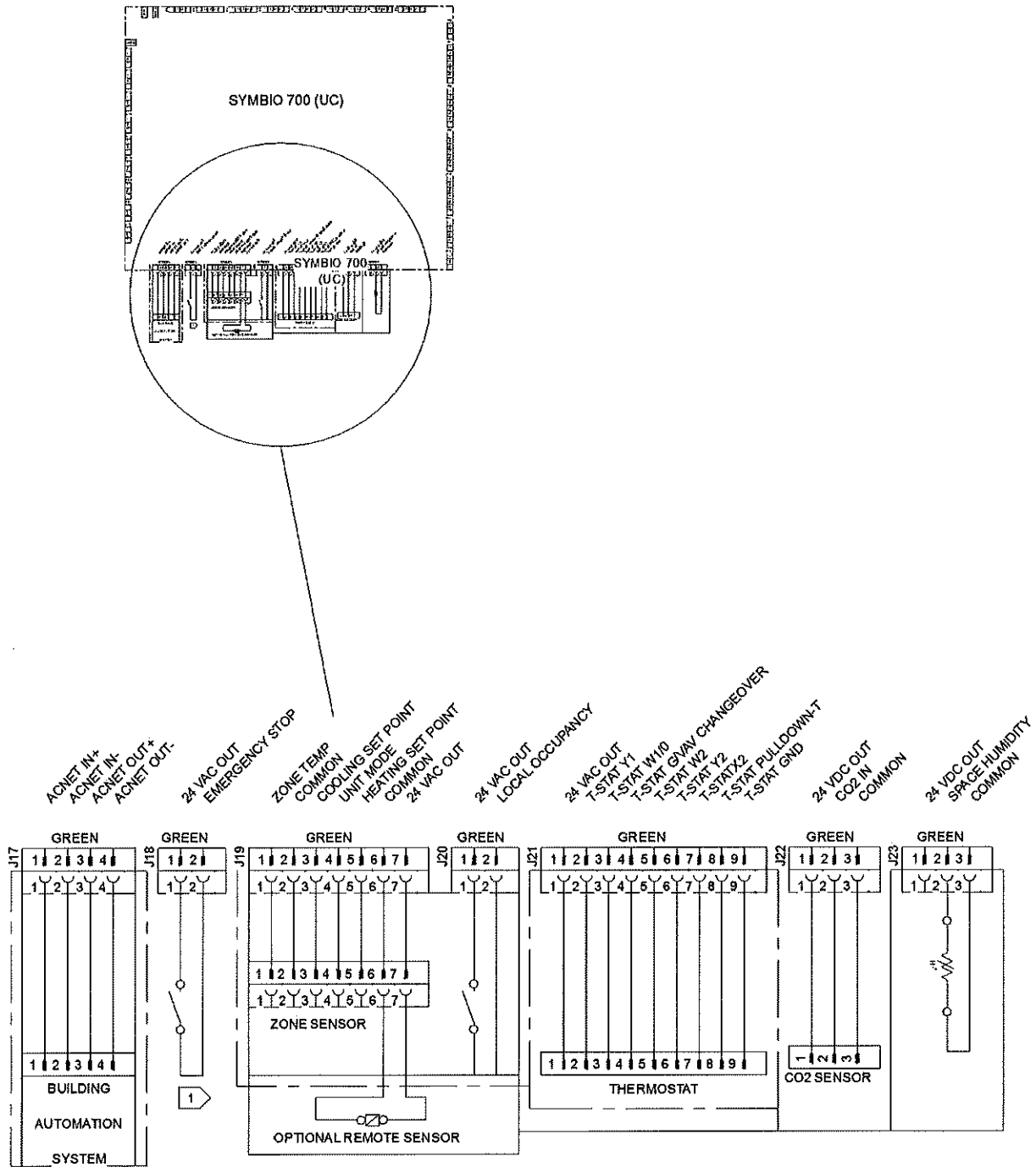


**ECONOMIZER AND BAROMETIC AIR DAMPER(S) (OPTION)**

DX COOLING / GAS HEAT STANDARD EFFICIENCY



NOTES:  
 1. VERIFY WEIGHT, CONNECTION, AND ALL DIMENSION WITH  
 INSTALLER DOCUMENTS BEFORE INSTALLATION



SYMBIO 700 (J17, J18, J19, J20, J21, J22, AND J23)

FIELD WIRING DRAWING



## General

- Packaged rooftop units cooling, heating capacities, and efficiencies are AHRI Certified within scope of AHRI Standard 210-240 for 6 to 25 Tons and ANSIZ21.47 and 10 CFR Part 431 pertaining to Commercial Warm Air Furnaces (all gas heating units).
- Convertible airflow.
- Symbio controls operating range is from 0-125.0 F from factory; if designing for cooling mode operation below 40.0 F ambient temp, add low ambient kit to assure continuous and reliable operation.
- Factory assembled, internally wired, fully charged with R-410A, and 100 percent run tested to check cooling operation, fan and blower rotation, and control sequence before leaving the factory.
- Colored and numbered wiring internal to the unit for simplified identification.
- Units cULus listed and labeled, classified in accordance for Central Cooling Air Conditioners.

## Casing

- Zinc coated, heavy gauge, galvanized steel.
- Weather resistant pre-painted metal with galvanized substrate.
- Meets ASTM B117, 672 hour salt spray test.
- Removable single side maintenance access panels.
- Lifting handles in maintenance access panels (can be removed and reinstalled by removing fasteners while providing a water and air tight seal).
- Exposed vertical panels and top covers in the indoor air section insulated with a cleanable foil-faced, fire-retardant permanent, odorless glass fiber material.
- Base pan shall have no penetrations within the perimeter of the curb other than the raised 1 inch high downflow supply/return openings to provide an added water integrity precaution, if the condensate drain backs up.
- Base of the unit insulated with 1/8 inch, foil-faced, closed-cell insulation.
- Unit base provisions for forklift and/or crane lifting on three sides of unit.

## Hail Guards

- Provides condenser coil protection.

## Microchannel Coils

- Optimal heat transfer performance due to flat, streamlined tubes with small ports, and metallurgical tube-to-fin bond.
- Reduce system refrigerant charge by up to 50% leading to better compressor reliability.
- Compact all-aluminum microchannel coils reduce the unit weight.
- Recyclable all aluminum coils All aluminium construction minimizes galvanic corrosion.
- Strong aluminum brazed structure provides better fin protection.
- Flat streamlined tubes more dust resistant and easy to clean.
- Coils leak tested at the factory to ensure the pressure integrity.

## Compressors

- All units have direct-drive, hermetic, scroll type compressors with centrifugal type oil pumps.
- Suction gas-cooled motor with voltage utilization range of plus or minus 10 percent of unit nameplate voltage.
- Internal overloads standard with scroll compressors.
- All units have dual compressors.
- Three stages of cooling available on 6 to 17.5 tons units and four stages of cooling available on 20 and 25 tons units.

## Filters

- Two inch standard filters shall be factory supplied on all units.

## Frostat

- Utilized as a safety device.
- Opens to prevent freezing temperatures on evaporator coil.
- Temperature will need to rise to 50°F before closing.
- Utilized in low airflow or high outside air applications (cooling only).



### **Gas Heating Section**

- The heating section shall have a progressive tubular heat exchanger with corrosion-resistant aluminized steel tubes and burners as standard on all models.
- Stainless steel heat exchanger with 409 stainless steel tubes and 439 stainless steel burners shall be optional.
- Induced draft combustion blower shall be used to pull the combustion products through the firing tubes.
- Heater shall use a direct spark ignition (DSI) system.
- On initial call for heat, the combustion blower shall purge the heat exchanger for 20 seconds before ignition.
- After three unsuccessful ignition attempts, entire heating system shall be locked out until manually reset at the thermostat/zone sensor.
- Units shall be suitable for use with natural gas or propane (field-installed kit).

### **Indoor Fan**

- Direct drive plenum fan design - 6 to 25 tons units.
- Plenum fan design - backward-curved fan wheel along with an external rotor direct drive variable speed indoor motor.
- Supply fan speed adjustments can be made using the Symbio 700 or Mobile App.
- Motors are thermally protected.
- Variable speed direct drive motors are high efficiency - 6 to 25 tons.

### **Heat Exchanger**

- Compact cabinet features a tubular heat exchanger in low, medium and high heat capacities.
- Corrosion-resistant aluminized steel tubes and burners are standard on all models.
- Induced draft blower to pull the gas mixture through the burner tubes.
- Direct spark ignition and a flame sensor as a safety device to validate the flame.

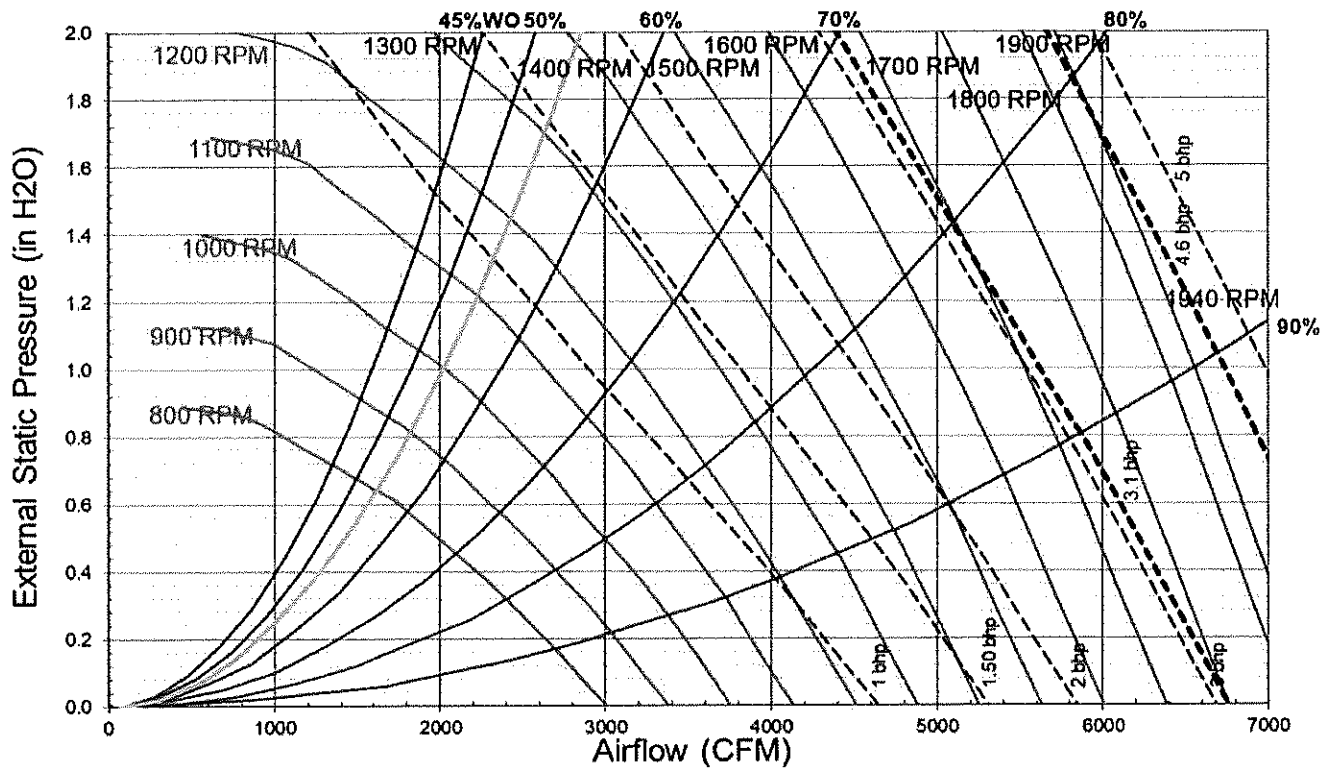
### **Stainless Steel Heat Exchanger**

- Thermal magnetic, molded case, HACR circuit breaker with provisions for through-the-base electrical connections.
- Circuit breaker installed within unit in water tight enclosure.
- Wiring provided from the switch to the unit high voltage terminal block.
- Circuit breaker will provide overcurrent protection, sized per NEC and cULus guidelines, and agency recognized by cULus.

### **Economizer (Standard)**

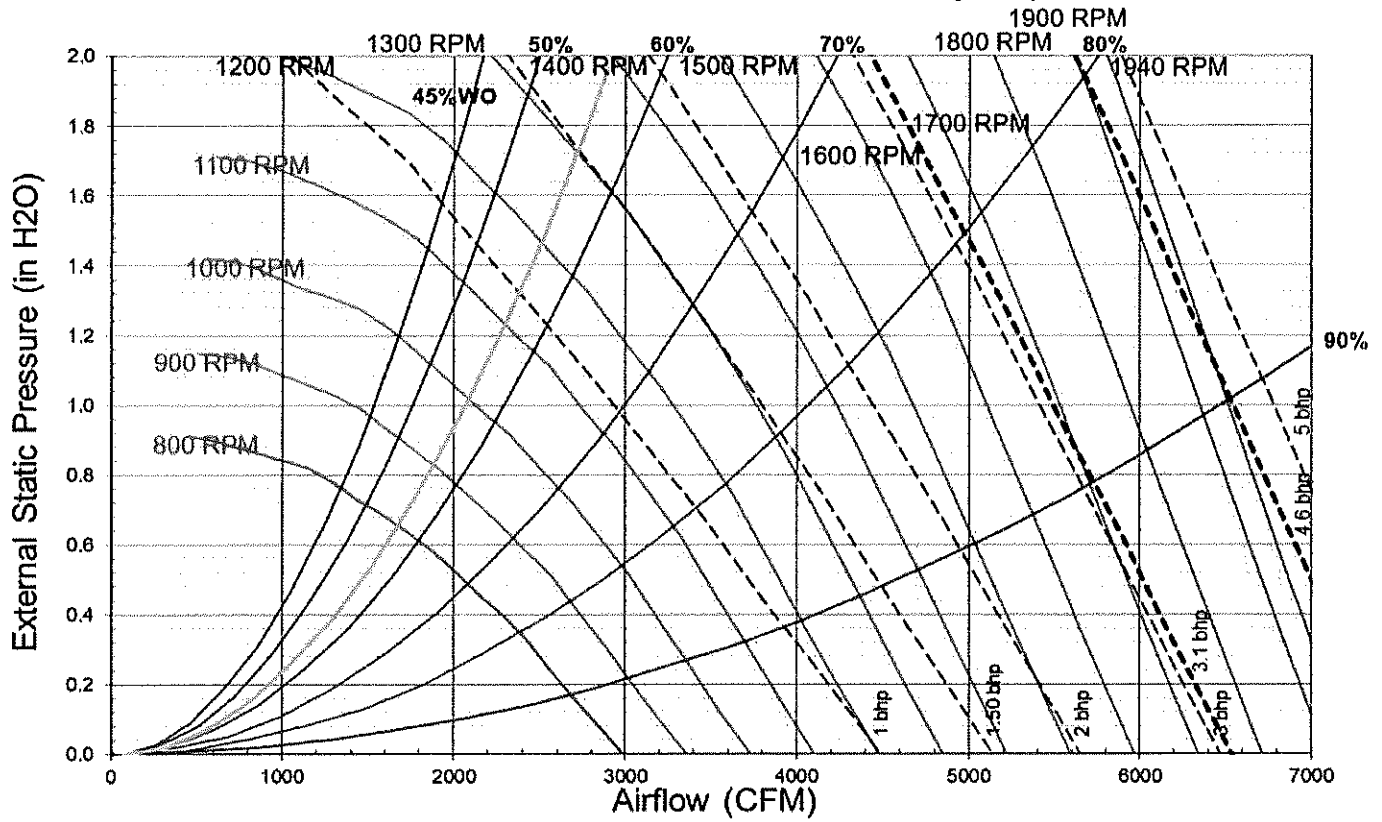
- Available with or without barometric relief.
- Fully modulating 0-100 percent motor and dampers, minimum position setting, preset linkage, wiring harness with plug, spring return actuator and fixed dry bulb control.
- Barometric relief shall provide a pressure operated damper that shall be gravity closing.
- Barometric relief shall prohibit entrance of outside air during the equipment "off" cycle.
- Optional solid state or differential enthalpy control.
- Arrives in shipping position and shall be moved to the operating position by the installing contractor.

TSJ072-120\*, Downflow, Std Filter, Wet Coil, Cooling Only



Note: Fan Curves are for TSJ/WSJ units. For YSJ units, add additional static pressure for Gas Heat Exchanger (ref. RT-PRC098\*, table 47)

### TSJ072-120\*, Horizontal, Std Filter, Wet Coil, Cooling Only



Note: Fan Curves are for TSJ/WSJ units. For YSJ units, add additional static pressure for Gas Heat Exchanger (ref. RT-PRC098\*, table 47)



# Proposal

Proposal is valid for 15 days.

Customer must obtain credit approval and release order to production within 60 days of proposal date.

**PROPRIETARY AND CONFIDENTIAL PROPERTY OF Trane U.S. Inc.  
DISTRIBUTION TO OTHER THAN THE NAMED RECIPIENT IS PROHIBITED**

**Prepared For:** All Bidders

**Date:** August 30, 2024

**Job Name:**  
Oak Ridge Schools Teaching and Learning

**Proposal Number:** J1-73162-11173-1  
**COOP or Federal Contract ID:** OMNIA Racine #3341

**Delivery Terms:**  
Freight Allowed and Prepaid - F.O.B. Factory

**Payment Terms:** Net 30 Days

Trane U.S. Inc. is pleased to provide the following proposal for your review and approval.

**Tag Data - Y4C (Qty: 1)**

Item	Tag(s)	Qty	Description	Model Number
A1	Y4C-2	1	5 Ton R-410A PKGD Unitary Gas/Electric R	YSC060G3RZB**F001

**Product Data - Y4C**

**Item: A1 Qty: 1 Tag(s): Y4C-2**

- DX cooling, gas heat
- Standard efficiency
- Convertible configuration
- 5 Ton
- 208-230/60/3
- Microprocessor controls
- High gas heat stainless steel heat exchanger
- Economizer Reference Enthalpy 0-100% with Barometric Relief
- Standard condenser coil w/hail guard
- 2-5 Year parts warranty
- Year 6-10 compressor warranty
- 10 year heat exchanger warranty

Total Net Price (Excluding Sales Tax) ..... \$ 8,550.00

Tax Status: Taxable <input checked="" type="checkbox"/> Exempt <input checked="" type="checkbox"/>	IF EXEMPT PLEASE SUBMIT COMPLETED TAX EXEMPTION CERTIFICATE WITH YOUR SIGNED PROPOSAL OR WITH YOUR PURCHASING DOCUMENTS, KEEP YOUR ORIGINAL ON FILE IN THE OFFICE. YOU WILL BE CHARGED TAX IF A VALID EXEMPTION CERTIFICATE IS NOT ON FILE BEFORE EQUIPMENT, PARTS OR SERVICES ARE PROVIDED. SEE <a href="http://WWW.TAXSITES.COM/STATE-LINKS.HTML">WWW.TAXSITES.COM/STATE-LINKS.HTML</a> FOR TAX FORMS.
---	--

Sincerely,

**Michael McDowell**

**Trane U.S. Inc.**

5220 Middlebrook Pike S.

Knoxville, TN 37921

Office Phone: (865) 588-0607

**This proposal is subject to your acceptance of the attached Trane terms and conditions.**

**TERMS AND CONDITIONS - COMMERCIAL EQUIPMENT**

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

1. **Acceptance.** These terms and conditions 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 sale of the described commercial equipment and any ancillary services (the "Equipment"). COMPANY'S TERMS AND CONDITIONS AND EQUIPMENT PRICES ARE SUBJECT TO PERIODIC CHANGE OR AMENDMENT. 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 15 days from the date of the Proposal. Prices in the Proposal are subject to change at any time upon notice to Customer. 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 Company's 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 provide Equipment in accordance with the Proposal and the Company's terms and conditions. If Customer does not reject or object in writing to Company within 10 days, Company's counteroffer will be deemed accepted. Notwithstanding anything to the contrary herein, Customer's acceptance of the Equipment 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.
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. **Title and Risk of Loss.** All Equipment sales with destinations to Canada or the U.S. shall be made as follows: FOB Company's U.S. manufacturing facility or warehouse (full freight allowed). Title and risk of loss or damage to Equipment will pass to Customer upon tender of delivery of such to carrier at Company's U.S. manufacturing facility or warehouse.
4. **Pricing and Taxes.** Within forty-five (45) days following Customer acceptance of the Proposal without addition of any other terms and conditions of sale or any modification, Customer shall provide notification of release for immediate production at Company's factory. Prices for Equipment are subject to change at any time prior to shipment to reflect any cost increases related to the manufacture, supply, and shipping of Equipment. 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. If shipment is delayed due to Customer's actions, Company may also charge Customer with storage fees. If a release is not received within 6 months following order acceptance, Company reserves the right to cancel any order. Company shall be entitled to equitable adjustments in the contract price to reflect any cost increases as set forth above and will provide notice to Customer prior to the date for which the increased price is to be in effect for the applicable customer contract. In no event will prices be decreased. The price of Equipment does not include any present or future foreign, federal, state, or local property, license, privilege, sales, use, excise, value added, gross receipts or other like taxes or assessments. Such amounts will be itemized separately to Customer, who will make prompt payment to Company. Company will accept valid exemption documentation for such taxes and assessments from Customer, if applicable. All prices include packaging in accordance with Company's standard procedures. Charges for special packaging, crating or packing are the responsibility of Customer.
5. **Delivery and Delays.** Delivery dates are approximate and not guaranteed. Company will use commercially reasonable efforts to deliver the Equipment on or before the estimated delivery date, will notify Customer if the estimated delivery dates cannot be honored, and will deliver the Equipment and services as soon as practicable thereafter. In no event will Company be liable for any damages or expenses caused by delays in delivery.
6. **Performance.** Company shall be obligated to furnish only the Equipment described in the Proposal and in submittal data (if such data is issued in connection with the order). Company may rely on the acceptance of the Proposal and submittal data as acceptance of the suitability of the Equipment for the particular project or location. Unless specifically stated in the Proposal, compliance with any local building codes or other laws or regulations relating to specifications or the location, use or operation of the Equipment is the sole responsibility of Customer. If Equipment is tendered that does not fully comply with the provisions of this Agreement and Equipment is rejected by Customer, Company will have the right to cure within a reasonable time after notice thereof by substituting a conforming tender whether or not the time for performance has passed.
7. **Force Majeure.** Company's duty to perform under this Agreement and the Equipment prices are contingent upon the non-occurrence of an Event of Force Majeure. If the Company shall be 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 Work 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; tornado; storm; fire; civil disobedience; pandemic insurrections; riots; labor/labour disputes; labor/labour or material shortages; 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.
8. **Limited Warranty.** Company warrants the Equipment manufactured by Company for a period of the lesser of 12 months from initial start-up or 18 months from date of shipment, whichever is less, against failure due to defects in material and manufacture and that it has the capacities and ratings set forth in Company's catalogs and bulletins ("Warranty"). Equipment manufactured by Company that includes required start-up and sold in North America will not be warranted by Company unless Company performs the Equipment startup. Exclusions from this Warranty include damage or failure arising from: wear and tear; corrosion, erosion, deterioration; modifications made by others to the Equipment; repairs or alterations by a party other than Company that adversely affects the stability or reliability of the Equipment; vandalism; neglect; accident; adverse weather or environmental conditions; abuse or improper use; improper installation; commissioning by a party other than Company; unusual physical or electrical or mechanical stress; operation with any accessory, equipment or part not specifically approved by Company; refrigerant not supplied by Company; and/or lack of proper maintenance as recommended by Company. Company shall not be obligated to pay for the cost of lost refrigerant or lost product. Company's obligations and liabilities under this Warranty are limited to furnishing replacement equipment or parts, at its option, FCA (Incoterms 2000) factory or warehouse (f.o.b. factory or warehouse for US domestic purposes) at Company-designated shipping point, freight-allowed to Company's warranty agent's stock location, for all non-conforming Company-manufactured Equipment (which have been returned by Customer to Company). Returns must have prior written approval by Company and are subject to restocking charge where applicable. 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. COMPANY MAKES NO REPRESENTATION OR WARRANTY OF ANY KIND, INCLUDING WARRANTY OF MERCHANTABILITY OR FITNESS FOR PARTICULAR PURPOSE. ADDITIONALLY, COMPANY MAKES NO REPRESENTATION OR WARRANTY OF ANY KIND 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.** No warranty liability whatsoever shall attach to Company until Customer's complete order has been paid for in full and Company's liability under this Warranty shall be limited to the purchase price of the Equipment shown to be defective. Additional warranty protection is available on an extra-cost basis and must be in writing and agreed to by an authorized signatory of the Company. **EXCEPT FOR COMPANY'S WARRANTY EXPRESSLY SET FORTH HEREIN, COMPANY DOES NOT MAKE, AND HEREBY EXPRESSLY DISCLAIMS, ANY WARRANTIES, EXPRESS OR IMPLIED CONCERNING ITS PRODUCTS, EQUIPMENT OR SERVICES, INCLUDING, WITHOUT LIMITATION, ANY WARRANTY OF DESIGN, MERCHANTABILITY OR OF FITNESS FOR A PARTICULAR PURPOSE, OR OTHERS THAT ARE ALLEGED TO ARISE FROM COURSE OF DEALING OR TRADE.**
9. **Indemnity.** To the fullest extent permitted by law, Company and Customer shall indemnify, defend 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 their 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. If the parties are both at fault, the obligation to indemnify shall be proportional to their relative fault. The duty to indemnify will continue in full force and effect, notwithstanding the expiration or early termination hereof, with respect to any claims based on facts or conditions that occurred prior to expiration or termination.
10. **Insurance.** Upon request, Company will furnish evidence of its standard insurance coverage. 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 waive any rights of subrogation.

**11. Customer Breach.** Each of the following events or conditions shall constitute a breach by Customer and shall give Company the right, without an election of remedies, to terminate this Agreement, require payment prior to shipping, or suspend performance by delivery of written notice: (1) Any failure by Customer to pay amounts when due; (2) any general assignment by Customer for the benefit of its creditors, or if Customer becomes bankrupt or insolvent or takes the benefit of any statute for bankrupt or insolvent debtors, or makes or proposes to make any proposal or arrangement with creditors, or if any steps are taken for the winding up or other termination of Customer or the liquidation of its assets, or if a trustee, receiver, or similar person is appointed over any of the assets or interests of Customer; (3) Any representation or warranty furnished by Customer in connection with this Agreement is false or misleading in any material respect when made; or (4) Any failure by Customer to perform or comply with any material provision of this Agreement. Customer shall be liable to the Company for all Equipment furnished and all damages sustained by Company (including lost profit and overhead).

**12. Limitation of Liability.** NOTWITHSTANDING ANYTHING TO THE CONTRARY, IN NO EVENT SHALL COMPANY BE LIABLE FOR ANY SPECIAL, INCIDENTAL, INDIRECT CONSEQUENTIAL, PUNITIVE, EXEMPLARY DAMAGES (INCLUDING WITHOUT LIMITATION REFRIGERANT LOSS, BUSINESS INTERRUPTION, LOST DATA, LOST REVENUE, LOST PROFITS), OR CONTAMINANTS LIABILITIES, EVEN IF A PARTY HAS BEEN ADVISED OF SUCH POSSIBLE DAMAGES OR IF SAME WERE REASONABLY FORESEEABLE AND REGARDLESS OF WHETHER THE CAUSE OF ACTION IS FRAMED IN CONTRACT, NEGLIGENCE, ANY OTHER TORT, WARRANTY, STRICT LIABILITY, OR PRODUCT LIABILITY. In no event will Company's liability in connection with the provision of products or services or otherwise under this Agreement exceed the entire amount paid to Company by Customer under this Agreement.

**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, MITIGATION, ELIMINATION, OR CONTAMINATION THEREOF) (COLLECTIVELY, "CONTAMINANTS LIABILITIES") AND CUSTOMER HEREBY EXPRESSLY RELEASES COMPANY FROM ANY SUCH CONTAMINANTS LIABILITIES.

**14. Nuclear Liability.** In the event that the Equipment sold hereunder is to be used in a nuclear facility, Customer will, prior to such use, arrange for insurance or governmental indemnity protecting Company against all liability and hereby releases and agrees to indemnify Company and its suppliers for any nuclear damage, including loss of use, in any manner arising out of a nuclear incident, whether alleged to be due, in whole or in part to the negligence or otherwise of Company or its suppliers.

**15. Intellectual Property; Patent Indemnity.** Company retains all ownership, license and other rights to all patents, trademarks, copyrights, trade secrets and other intellectual property rights related to the Equipment, and, except for the right to use the Equipment sold, Customer obtains no rights to use any such intellectual property. Company agrees to defend any suit or proceeding brought against Customer so far as such suit or proceeding is solely based upon a claim that the use of the Equipment provided by Company constitutes infringement of any patent of the United States of America, provided Company is promptly notified in writing and given authority, information and assistance for defense of same. Company will, at its option, procure for Customer the right to continue to use said Equipment, or modify it so that it becomes non-infringing, or replace same with non-infringing Equipment, or to remove said Equipment and to refund the purchase price. The foregoing will not be construed to include any Agreement by Company to accept any liability whatsoever in respect to patents for inventions including more than the Equipment furnished hereunder, or in respect of patents for methods and processes to be carried out with the aid of said Equipment. The provision of Equipment by Company does not convey any license, by implication, estoppel, or otherwise, under patent claims covering combinations of said Equipment with other devices or elements. The foregoing states the entire liability of Company with regard to patent infringement. Notwithstanding the provisions of this paragraph, Customer will hold Company harmless against any expense or loss resulting from infringement of patents or trademarks arising from compliance with Customer's designs or specifications or instructions.

**16. Cancellation.** Equipment is specially manufactured in response to orders. An order placed with and accepted by Company cannot be delayed, canceled, suspended, or extended except with Company's written consent and upon written terms accepted by Company that will reimburse Company for and indemnify Company against loss and provide Company with a reasonable profit for its materials, time, labor, services, use of facilities and otherwise. Customer will be obligated to accept any Equipment shipped, tendered for delivery or delivered by Company pursuant to the order prior to any agreed delay, cancellation, suspension or extension of the order. Any attempt by Customer to unilaterally revoke, delay or suspend acceptance for any reason whatever after it has agreed to delivery of or accepted any shipment shall constitute a breach of this Agreement. For purposes of this paragraph, acceptance occurs by any waiver of inspection, use or possession of Equipment, payment of the invoice, or any indication of exclusive control exercised by Customer.

**17. Invoicing and Payment.** Unless otherwise agreed to in writing by Company, equipment shall be invoiced to Customer upon tender of delivery thereof to the carrier. Customer shall pay Company's invoices within net 30 days of shipment date. 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. Customer shall pay all costs (including attorneys' fees) incurred by Company in attempting to collect amounts due and otherwise enforcing these terms and conditions. If requested, Company will provide appropriate lien waivers upon receipt of payment. Company may at any time decline to ship, make delivery or perform work except upon receipt of cash payment, letter of credit, or security, or upon other terms and conditions satisfactory to Company. Customer agrees that, unless Customer makes payment in advance, Company will have a purchase money security interest in all Equipment to secure payment in full of all amounts due Company and its order for the Equipment, together with these terms and conditions, form a security agreement (as defined by the UCC in the United States and as defined in the Personal Property Security Act in Canada). Customer shall keep the Equipment free of all taxes and encumbrances, shall not remove the Equipment from its original installation point and shall not assign or transfer any interest in the Equipment until all payments due Company have been made. The purchase money security interest granted herein attaches upon Company's acceptance of Customer's order and on receipt of the Equipment described in the accepted Proposal but prior to its installation. The parties have no agreement to postpone the time for attachment unless specifically noted in writing on the accepted order. Customer will have no rights of set off against any amounts, which become payable to Company under this Agreement or otherwise.

**18. Claims.** Company will consider claims for concealed shortages in shipments or rejections due to failure to conform to an order only if such claims or rejections are made in writing within 15 days of delivery and are accompanied by the packing list and, if applicable, the reasons in detail why the Equipment does not conform to Customer's order. Upon receiving authorization and shipping instructions from authorized personnel of Company, Customer may return rejected Equipment, transportation charges prepaid, for replacement. Company may charge Customer any costs resulting from the testing, handling, and disposition of any Equipment returned by Customer which are not found by Company to be nonconforming. All Equipment damaged during shipment and all claims relating thereto must be made with the freight carrier in accordance with such carrier's policies and procedures. Claims for Equipment damaged during shipment are not covered under the warranty provision stated herein.

**19. Export Laws.** The obligation of Company to supply Equipment 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 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 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.

**20. 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 of New York for Equipment shipped to a U.S. location and the laws of the province to which Equipment is shipped within Canada, without regard to its conflict of law principles that might otherwise call for the application of a different state's or province's law, and not including the United Nations Convention on Contracts for the International Sale of Goods. Any action or suit arising out of or related to this Agreement must be commenced within one year after the cause of action has accrued. To the extent the Equipment is being used at a site owned and/or operated by any agency of the Federal Government, determination of any substantive issue of law shall be according to the Federal common law of Government contracts as enunciated and applied by Federal judicial bodies and boards of contract appeals of the 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 subject matter hereof. This Agreement may not be amended, modified or terminated except by a writing signed by the parties hereto. No documents shall be incorporated herein by reference except to the extent Company is a signatory thereon. If any term or condition of this Agreement is invalid, illegal or incapable of being enforced by any rule of law, all other terms and conditions 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, or its right, title or interest herein, without the written consent of the Company. Subject to the foregoing, this Agreement shall be binding upon and inure to the benefit of Customer's 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.

**21. Equal Employment Opportunity/Affirmative Action Clause.** Company is a federal contractor that complies fully with Executive Order 11246, as amended, and the applicable regulations contained in 41 C.F.R. Parts 60-1 through 60-60, 29 U.S.C. Section 793 and the applicable regulations contained in 41 C.F.R. Part 60-741; and 38

U.S.C. Section 4212 and the applicable regulations contained in 41 C.F.R. Part 60-250 Executive Order 13496 and Section 29 CFR 471, appendix A to subpart A, regarding the notice of employee rights in the United States and with Canadian Charter of Rights and Freedoms Schedule B to the Canada Act 1982 (U.K.) 1982, c. 11 and applicable Provincial Human Rights Codes and employment law in Canada.

**22. U.S. Government Work.**

The following provision applies only to direct sales by Company to the US Government. The Parties acknowledge that Equipment 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).

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 sale of the Equipment is 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 work that is the subject of the Proposal or this Agreement, other than the Proposal or this Agreement.

**23. 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.

1-26.130-4 (0622)  
Supersedes 1-26.130-4(1221b)

---

**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:
- 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.
  - 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.
  - 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.
  - 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).
  - 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. 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.

November 2023



# Trane Precedent Gas/Electric Packaged Rooftop

## Unit Overview - YSC060G3RZB\*\*F0010000000000000000000000

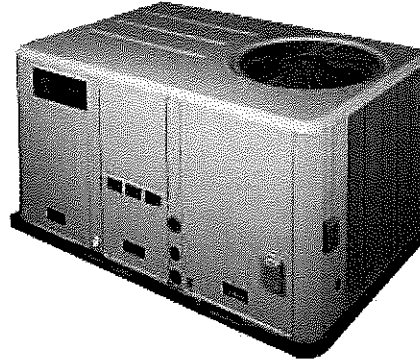
Application	Unit Size	Supply Fan		External Dimensions (in.)			Operating Weight		EER	IEER/SEER	Elevation
		Airflow	External Static Pressure	Height	Width	Length	Minimum	Maximum			
DX cooling, gas heat	5 Ton (060)	2000 cfm	0.500 in H2O	3.41 ft	3.69 ft	5.82 ft	522.0 lb	797.0 lb	12.00	14.00	

### Unit Features

- Fresh Air Selection** Econ-ref enthalpy 0-100% w/ bar rel 3ph
- Condenser coil protection** Std condenser coil w/hail guard

### Unit Electrical

- Voltage/phase/hertz** 208-230/60/3
- MCA** 29.00 A
- MOP** 40.00 A



### Controls

Unit Controls: Microprocessor controls

### Cooling Section

- Entering Dry Bulb** 80.00 F
- Entering Wet Bulb** 67.00 F
- Ambient Temp** 95.00 F
- Leaving Coil Dry Bulb** 57.55 F
- Leaving Coil Wet Bulb** 57.55 F
- Leaving Unit Dry Bulb** 59.47 F
- Leaving Unit Wet Bulb** 58.29 F

- Capacity**
- Gross Total** 59.96 MBh
- Gross Sensible** 49.29 MBh
- Net Total** 57.44 MBh
- Net Sensible** 46.77 MBh
- Fan Motor Heat** 1.85 MBh
- Refrig Charge-circuit 1** 4.8 lb

#### Refrigeration System Options

- Leaving Dew Point** 57.56 F

### Heating Section

- Heat Type** Gas Heat
- Heating Stages** 2
- Output Heating Capacity** 121.50 MBh
- Output Heating Capacity with Fan** 123.97 MBh
- Heating EAT** 70.00 F
- Heating LAT** 126.40 F
- Heating Temp Rise** 56.40 F

### Fan Section

#### Indoor Fan Data

- Type** FC Centrifugal
- Drive Type** Direct
- Evap Fan FLA** 6.90 A
- Indoor Fan Performance**
- Airflow** 2000 cfm
- Design ESP** 0.500 in H2O
- Component SP** 0.180 in H2O
- Total SP** 0.680 in H2O
- Supply Motor Horsepower** 1.000 hp
- Indoor Motor Operating Power** 0.81 bhp
- Indoor Motor Power** 0.60 kW
- Indoor RPM** 1039 rpm

#### Outdoor Fan Data

- Type** Propeller
- Fan Quantity** 1
- Drive Type** Direct
- Outdoor Fan Performance**
- Condenser Fan FLA** 1.40 A

### Compressor Section

- Power** 3.94 kW
- Circuit 1 RLA** 15.90 A
- Circuit 2 RLA** 0.00 A



**Acoustics**

Sound Path	63 Hz	125 Hz	250 Hz	500 Hz	1 kHz	2 kHz	4 kHz	8 kHz
Ducted Discharge	90 dB	76 dB	75 dB	63 dB	61 dB	57 dB	54 dB	47 dB
Ducted Inlet	91 dB	75 dB	67 dB	57 dB	53 dB	51 dB	50 dB	45 dB
Outdoor Noise	85 dB	82 dB	81 dB	81 dB	77 dB	72 dB	67 dB	61 dB

Note: Ducted Inlet and Ducted Discharge Sound Power Levels are in accordance with AHRI 260.  
 Note: Outdoor Sound Power Levels are in accordance with AHRI 270.

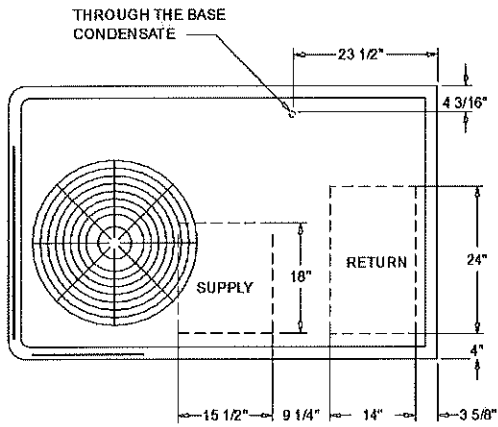
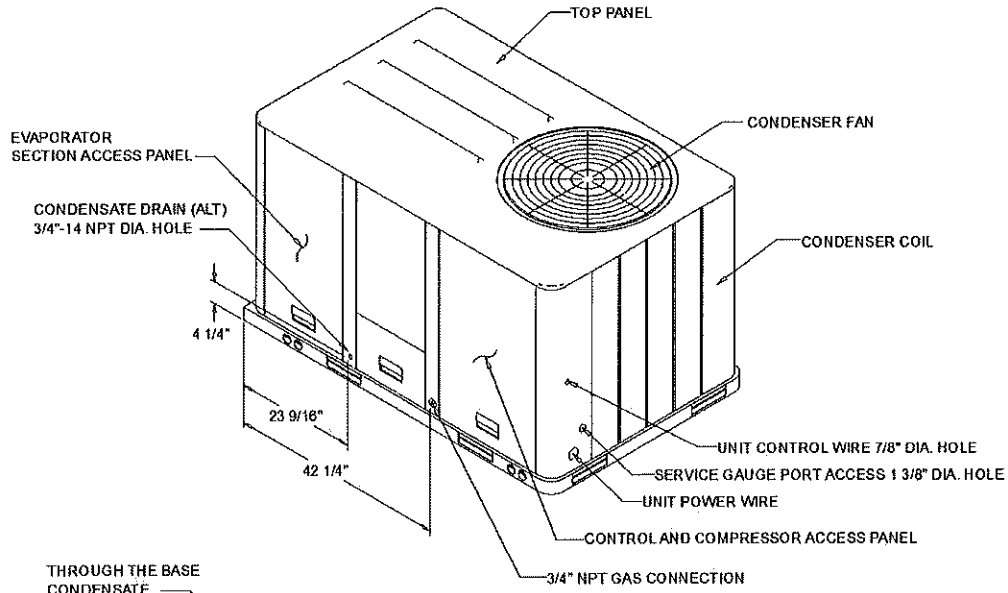
**Warranty**

<b>Compressor parts</b>	Year 6-10 compressor warranty
<b>Parts less compressor warranty</b>	2nd-5th yr parts less compr. warranty



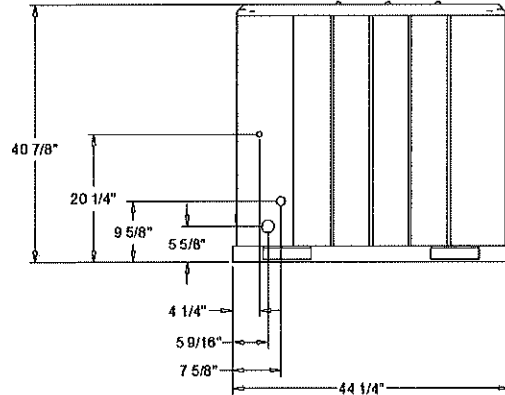
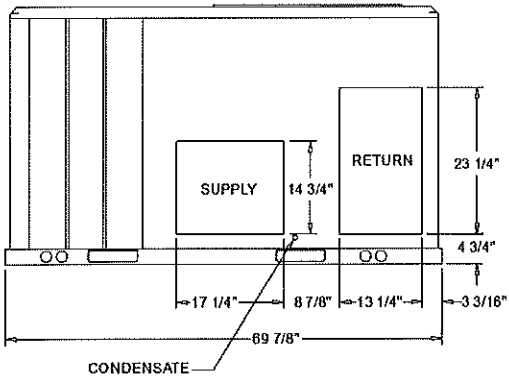
**TRANE**

Job Name: Oak Ridge Schools Teaching and Learning  
Prepared For:  
Unit Tag: Y4C-2  
Quantity: 1



NOTES:  
 1. THRU -THE -BASE GAS AND ELECTRICAL IS NOT STANDARD ON ALL UNITS.  
 2. VERIFY WEIGHT, CONNECTION, AND ALL DIMENSION WITH INSTALLER DOCUMENTS BEFORE INSTALLATION

PLAN VIEW UNIT  
 DIMENSION DRAWING



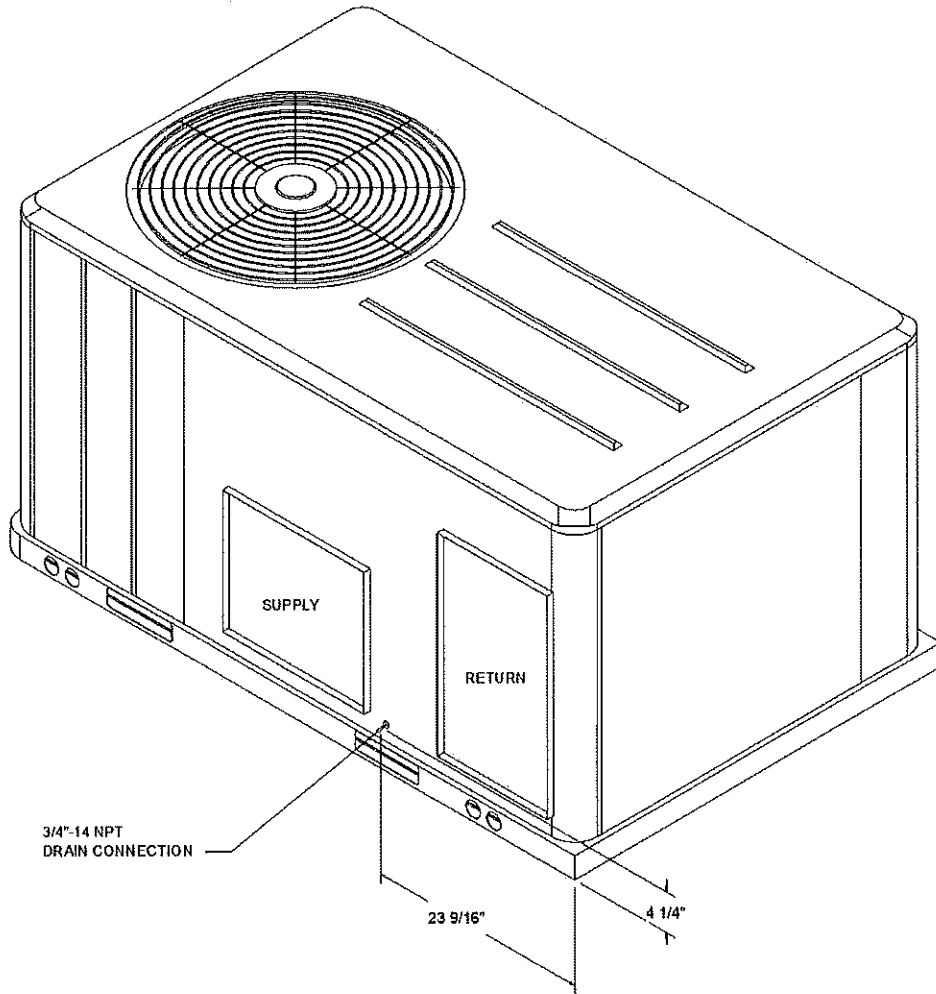
→  
 HORIZONTAL  
 AIR FLOW

PACKAGED GAS / ELECTRICAL  
 DIMENSION DRAWING



**TRANE**

Job Name: Oak Ridge Schools Teaching and Learning  
Prepared For:  
Unit Tag: Y4C-2  
Quantity: 1



ISOMETRIC-PACKAGED COOLING



### ELECTRICAL / GENERAL DATA

<b>GENERAL (2)(4)(6)</b> Model: YSC060G Oversized Motor Unit Operating Voltage: 187-253 MCA: N/A Unit Primary Voltage: 208 MFS: N/A Unit Secondary Voltage: 230 MCB: N/A Unit Hertz: 60 Unit Phase: 3  Standard Motor MCA: 29.0 MCA: N/A MFS: 40.0 MFS: N/A MCB: 40.0 MCB: N/A		<b>HEATING PERFORMANCE</b> <b>HEATING - GENERAL DATA</b> Heating Model: High Heating Input (BTU): 150,000/105,000 Heating Output (BTU): 121,500/85,050 No. Burners: 4 No. Stages: 2  Gas Inlet Pressure Natural Gas (Min/Mix): LP (Min/Max) Gas Pipe Connection Size:																						
<b>INDOOR MOTOR</b> <table border="0"> <tr> <td>Standard Motor</td> <td>Oversized Motor</td> <td>Field Installed Oversized Motor</td> </tr> <tr> <td>Number: 1</td> <td>Number: N/A</td> <td>Number: N/A</td> </tr> <tr> <td>Horsepower: 1.0</td> <td>Horsepower: N/A</td> <td>Horsepower: N/A</td> </tr> <tr> <td>Motor Speed (RPM): --</td> <td>Motor Speed (RPM): N/A</td> <td>Motor Speed (RPM): N/A</td> </tr> <tr> <td>Phase: 1</td> <td>Phase: N/A</td> <td>Phase: N/A</td> </tr> <tr> <td>Full Load Amps: 8.2</td> <td>Full Load Amps: N/A</td> <td>Full Load Amps: N/A</td> </tr> <tr> <td>Locked Rotor Amps: --</td> <td>Locked Rotor Amps: N/A</td> <td>Locked Rotor Amps: N/A</td> </tr> </table>				Standard Motor	Oversized Motor	Field Installed Oversized Motor	Number: 1	Number: N/A	Number: N/A	Horsepower: 1.0	Horsepower: N/A	Horsepower: N/A	Motor Speed (RPM): --	Motor Speed (RPM): N/A	Motor Speed (RPM): N/A	Phase: 1	Phase: N/A	Phase: N/A	Full Load Amps: 8.2	Full Load Amps: N/A	Full Load Amps: N/A	Locked Rotor Amps: --	Locked Rotor Amps: N/A	Locked Rotor Amps: N/A
Standard Motor	Oversized Motor	Field Installed Oversized Motor																						
Number: 1	Number: N/A	Number: N/A																						
Horsepower: 1.0	Horsepower: N/A	Horsepower: N/A																						
Motor Speed (RPM): --	Motor Speed (RPM): N/A	Motor Speed (RPM): N/A																						
Phase: 1	Phase: N/A	Phase: N/A																						
Full Load Amps: 8.2	Full Load Amps: N/A	Full Load Amps: N/A																						
Locked Rotor Amps: --	Locked Rotor Amps: N/A	Locked Rotor Amps: N/A																						
<b>COMPRESSOR Circuit 1/2</b> Number: 1 Horsepower: 4.3 Phase: 3 Rated Load Amps: 15.9 Locked Rotor Amps: 100.0		<b>OUTDOOR MOTOR</b> Number: 1 Horsepower: 0.40 Motor Speed (RPM): 1100 Phase: 1 Full Load Amps: 1.4 Locked Rotor Amps: 5.2																						
<b>POWER EXHAUST ACCESSORY (3,7)</b> (Field Installed Power Exhaust) Phase: N/A Horsepower: N/A Motor Speed (RPM): N/A Full Load Amps: N/A Locked Rotor Amps: N/A	<b>FILTERS</b> Type: Throwaway Furnished: Yes Number: 2 Recommended: 20"x35"x2"	<b>REFRIGERANT (2)</b> Type Factory Charge Circuit #1: 4.8 lb Circuit #2: N/A																						

**NOTES:**

1. Maximum (HACR) Circuit Breaker sizing is for installations in the United States only.
2. Refrigerant charge is an approximate value. For a more precise value, see unit nameplate and service instructions.
3. Value does not include Power Exhaust Accessory.
4. Value includes oversized motor.
5. Value does not include Power Exhaust Accessory.
6. EER is rated at AHRI conditions and in accordance with DOE test procedures.
7. Installation of this power exhaust kit will affect unit level MCA and could affect MOP sizing having a direct impact on existing field wiring and unit protection devices. The change in MCAMOP is the sole responsibility of the field installing party. Trane will not issue new nameplates as a result of this power exhaust accessory installation. FLA of the power exhaust kit option must be added to the MCA of the unit for building supply conductor sizing determination.

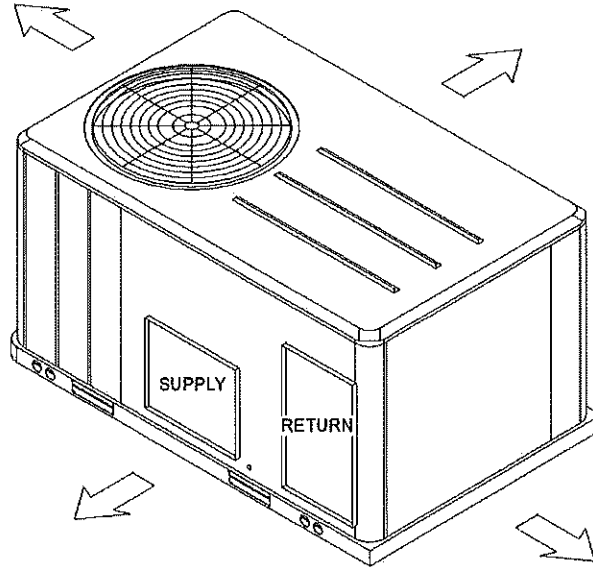




CLEARANCE FROM TOP OF UNIT 72"

CLEARANCE 36"

CLEARANCE 48"

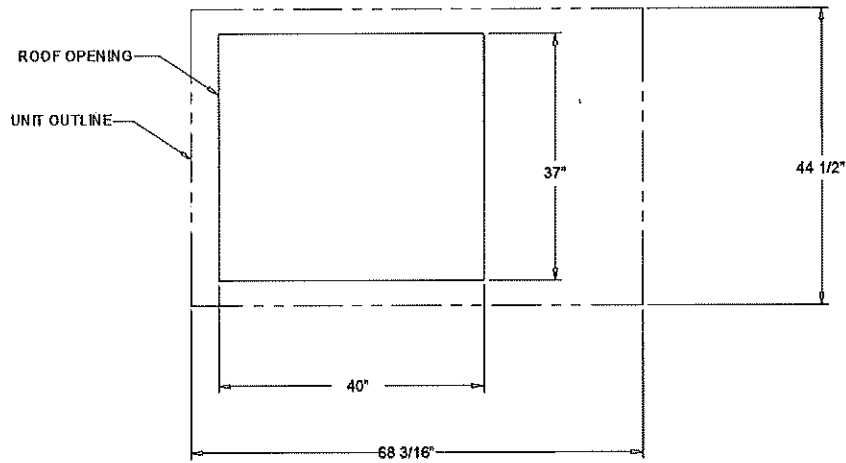


DOWNFLOW CLEARANCE 36"  
HORIZONTAL CLEARANCE 18"

CLEARANCE 36"

PACKAGED GAS / ELECTRIC

CLEARANCE



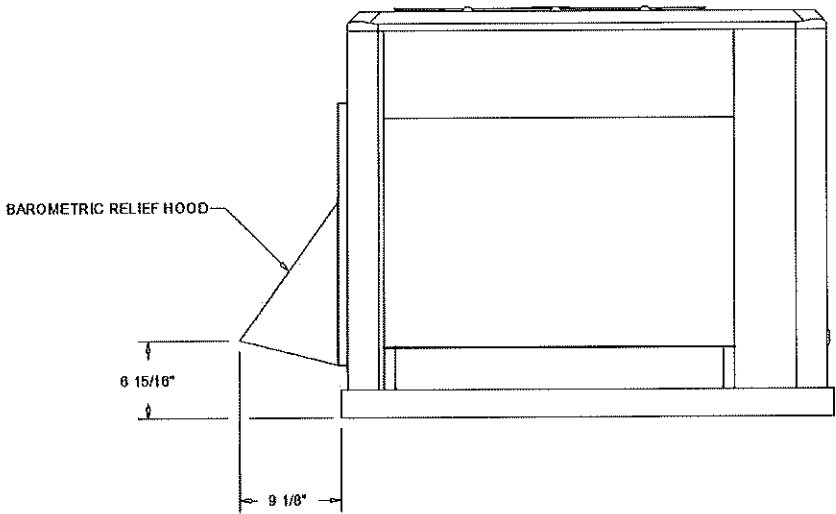
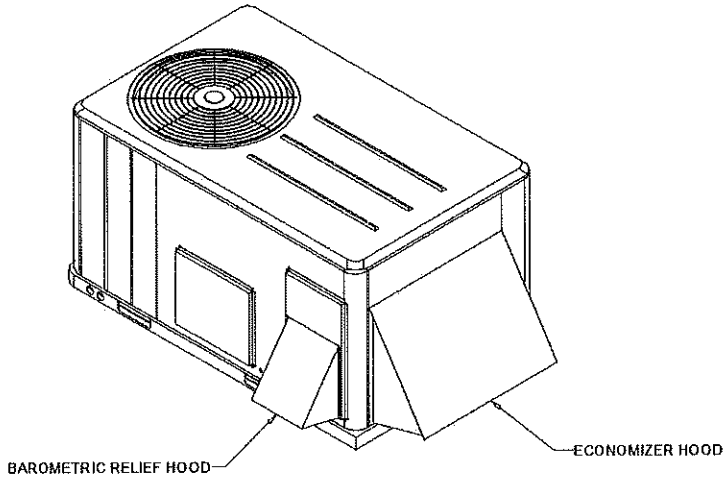
PACKAGED GAS / ELECTRIC

DOWNFLOW TYPICAL ROOF OPENING



**TRANE**

Job Name: Oak Ridge Schools Teaching and Learning  
Prepared For:  
Unit Tag: Y4C-2  
Quantity: 1

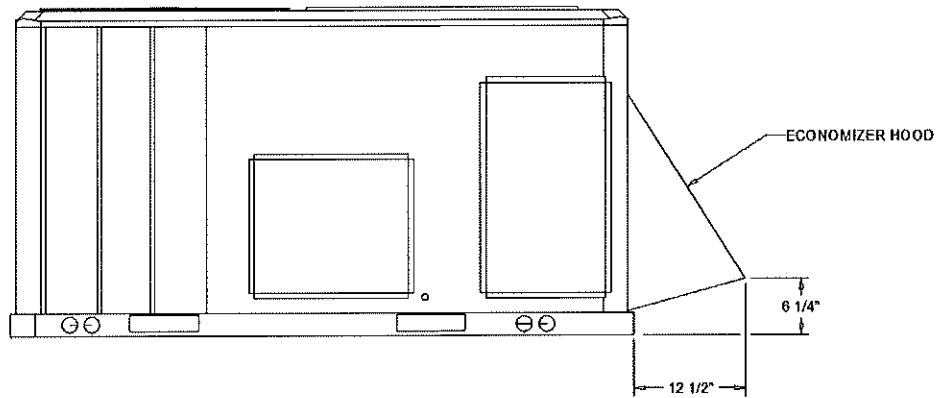
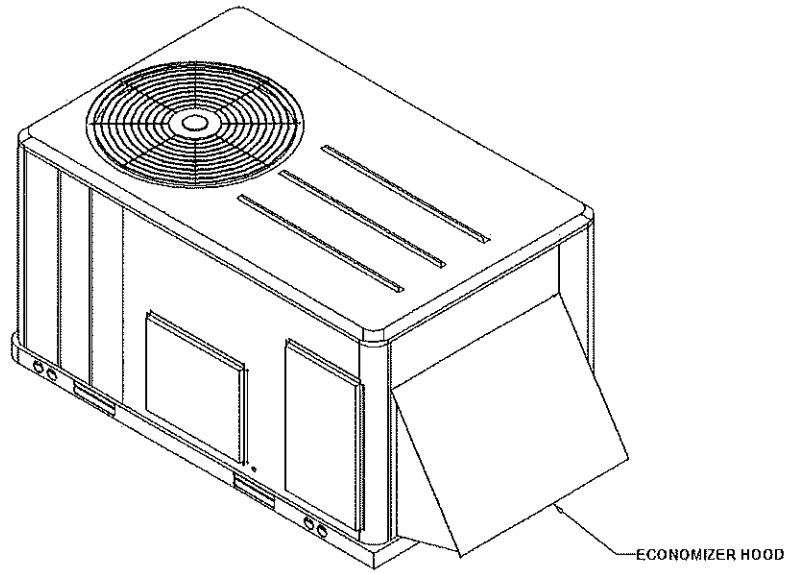


ACCESSORY - BAROMETRIC RELIEF DAMPER HOOD



**TRANE**

Job Name: Oak Ridge Schools Teaching and Learning  
Prepared For:  
Unit Tag: Y4C-2  
Quantity: 1



ACCESSORY - ECONOMIZER HOOD



## General

The units shall be convertible airflow. The operating range shall be between 115°F and 0°F in cooling as standard from the factory for units with microprocessor controls. Operating range for units with electromechanical controls shall be between 115°F and 40°F. Cooling performance shall be rated in accordance with ARI testing procedures. All units shall be factory assembled, internally wired, fully charged with R-410A, and 100 percent run tested to check cooling operation, fan and blower rotation, and control sequence before leaving the factory. Wiring internal to the unit shall be colored and numbered for simplified identification. Units shall be cULus listed and labeled, classified in accordance for Central Cooling Air Conditioners.

## Casing

Unit casing shall be constructed of zinc coated, heavy gauge, galvanized steel. Exterior surfaces shall be cleaned, phosphatized, and finished with a weather-resistant baked enamel finish. Unit's surface shall be tested 672 hours in a salt spray test in compliance with ASTM B117. Cabinet construction shall allow for all maintenance on one side of the unit. Service panels shall have lifting handles and be removed and reinstalled by removing two fasteners while providing a water and air tight seal. All exposed vertical panels and top covers in the indoor air section shall be insulated with a cleanable foil-faced, fire-retardant permanent, odorless glass fiber material. The base of the unit shall be insulated with 1/8", foil-faced, closed-cell insulation. All insulation edges shall be either captured or sealed. The unit's base pan shall have no penetrations within the perimeter of the curb other than the raised 1 1/8" high downflow supply/return openings to provide an added water integrity precaution, if the condensate drain backs up. The base of the unit shall have provisions for forklift and crane lifting, with forklift capabilities on three sides of the unit.

## Unit Top

The top cover shall be one piece construction or, where seams exist, it shall be double-hemmed and gasket-sealed. The ribbed top adds extra strength and enhances water removal from unit top.

## Filters

Throwaway filters shall be standard on all units. Optional 2-inch MERV 8 and MERV 13 filters shall also be available.

## Compressors

All units shall have direct-drive, hermetic, scroll type compressors with centrifugal type oil pumps. Motor shall be suction gas-cooled and shall have a voltage utilization range of plus or minus 10 percent of unit nameplate voltage. Internal overloads shall be provided with the scroll compressors.

Dual compressors are outstanding for humidity control, light load cooling conditions and system back-up applications. Dual compressors are available on 7½-10 ton models and allow for efficient cooling utilizing 3-stages of compressor operation for all high efficiency models.

## Indoor Fan

The following units shall be equipped with a direct drive plenum fan design (T/YSC120F, T/YHC074F, T/YHC092F, T/YHC102F, 120F). Plenum fan design shall include a backward-curved fan wheel along with an external rotor direct drive variable speed indoor motor. All plenum fan designs will have a variable speed adjustment potentiometer located in the control box.

3 to 5 ton units (high efficiency 3-phase with optional motor) are belt driven, FC centrifugal fans with adjustable motor sheaves. 3 to 5 ton units (standard and high efficiency 3-phase) have multispeed, direct drive motors. All 6 to 8½ ton units (standard efficiency) shall have belt drive motors with an adjustable idler-arm assembly for quick-adjustment to fan belts and motor sheaves. All motors shall be thermally protected. All 10 tons, 6 ton (074), 7½ to 8½ (high efficiency) units have variable speed direct drive motors. All indoor fan motors meet the U.S. Energy Policy Act of 1992 (EPACT).

## Outdoor Fans

The outdoor fan shall be direct-drive, statically and dynamically balanced, draw-through in the vertical discharge position. The fan motor shall be permanently lubricated and shall have built-in thermal overload protection.



### **Evaporator and Condenser Coils**

Internally finned, 5/16" copper tubes mechanically bonded to a configured aluminum plate fin shall be standard. Evaporator coils are standard for all 3 to 10 ton standard efficiency models. Microchannel condenser coils are standard for all 3 to 10 ton standard efficiency models and 4, 5, 6, 7.5, 8.5 ton high efficiency models. The microchannel type condenser coil is not offered on the 4 and 5 ton dehumidification model. Due to flat streamlined tubes with small ports, and metallurgical tube-to-fin bond, microchannel coil has better heat transfer performance. Microchannel condenser coil can reduce system refrigerant charge by up to 50% because of smaller internal volume, which leads to better compressor reliability. Compact all-aluminum microchannel coils also help to reduce the unit weight. These all aluminum coils are recyclable. Galvanic corrosion is also minimized due to all aluminum construction. Strong aluminum brazed structure provides better fin protection. In addition, flat streamlined tubes also make microchannel coils more dust resistant and easier to clean. Coils shall be leak tested at the factory to ensure the pressure integrity. The evaporator coil and condenser coil shall be leak tested to 600 psig. The assembled unit shall be leak tested to 465 psig. The condenser coil shall have a patent pending 1+1+1 hybrid coil designed with slight gaps for ease of cleaning. A plastic, dual-sloped, removable and reversible condensate drain pan with through-the-base condensate drain is standard.

### **Tool-less Hail Guards**

Tool-less, hail protection quality coil guards are available for condenser coil protection.

### **Controls**

Unit shall be completely factory-wired with necessary controls and contactor pressure lugs or terminal block for power wiring. Unit shall provide an external location for mounting a fused disconnect device. A choice of microprocessor or electromechanical controls shall be available. Microprocessor controls provide for all 24V control functions. The resident control algorithms shall make all heating, cooling, and/or ventilating decisions in response to electronic signals from sensors measuring indoor and outdoor temperatures. The control algorithm maintains accurate temperature control, minimizes drift from set point, and provides better building comfort. A centralized microprocessor shall provide anti-short cycle timing and time delay between compressors to provide a higher level of machine protection. 24-volt electromechanical control circuit shall include control transformer and contactor

### **High Pressure Control**

All units include High Pressure Cutout as standard.

### **Phase monitor**

Phase monitor shall provide 100% protection for motors and compressors against problems caused by phase loss, phase imbalance, and phase reversal. Phase monitor is equipped with an LED that provides an ON or FAULT indicator. There are no field adjustments. The module will automatically reset from a fault condition.

### **Refrigerant Circuits**

Each refrigerant circuit offer thermal expansion valve as standard. Service pressure ports, and refrigerant line filter driers are factory-installed as standard. An area shall be provided for replacement suction line driers.

### **Gas Heating Section**

The heating section shall have a progressive tubular heat exchanger design using stainless steel burners and corrosion resistant steel throughout. An induced draft combustion blower shall be used to pull the combustion products through the firing tubes. The heater shall use a direct spark ignition (DSI) system. On initial call for heat, the combustion blower shall purge the heat exchanger for 20 seconds before ignition. After three unsuccessful ignition attempts, the entire heating system shall be locked out until manually reset at the thermostat/zone sensor. Units shall be suitable for use with natural gas or propane (field-installed kit) and also comply with the California requirement for low NOx emissions (Gas/Electric Only).



## **Economizer**

This accessory shall be available with or without barometric relief. The assembly includes fully modulating 0-100 percent motor and dampers, minimum position setting, preset linkage, wiring harness with plug, spring return actuator and fixed dry bulb control. The barometric relief shall provide a pressure operated damper that shall be gravity closing and shall prohibit entrance of outside air during the equipment off cycle. Optional solid state or differential enthalpy control shall be available for either factory or field installation. The economizer arrives in the shipping position and shall be moved to the operating position by the installing contractor.

### **\*\*\*ATTENTION\*\*\***

For installation in SCAQMD only: This furnace does not meet the SCAQMD Rule 1111 14 ng/J NOx emission limit, and thus is subject to a mitigation fee of up to \$450. This furnace is not eligible for the Clean Air Furnace Rebate Program: [www.CleanAirFurnaceRebate.com](http://www.CleanAirFurnaceRebate.com).

## **Sequence of Operation (if applied in a SINGLE-ZONE CONSTANT-VOLUME SYSTEM or a CHANGEOVER BYPASS SYSTEM)**

### **B. SINGLE-ZONE CONSTANT-VOLUME SYSTEM**

#### **1. OCCUPIED HEAT/COOL:**

The RTU shall operate the supply fan continuously and modulate (or cycle) compressors, modulate (or stage) heat, and/or enable airside economizing to maintain zone temperature at setpoint. The OA damper shall open to bring in the required amount of ventilation.

#### **2. MORNING WARM-UP/PRE-COOL:**

The RTU shall operate the supply fan and modulate (or cycle) compressors or modulate (or stage) heat to raise/lower zone temperature to its occupied setpoint. The OA damper shall remain closed, unless economizing.

### **D. CHANGEOVER BYPASS SYSTEM**

#### **1. OCCUPIED HEAT/COOL:**

Each VAV terminal shall use pressure-independent control, with airflow measurement, to vary primary airflow to maintain zone temperature at its occupied setpoint. The RTU shall modulate the bypass damper to maintain duct static pressure at setpoint and modulate (or cycle) compressors, modulate (or stage) heat, and/or enable airside economizing based on current zone cooling/heating demands. The OA damper shall open to bring in the required amount of ventilation.

#### **2. MORNING WARM-UP/PRE-COOL:**

Each VAV terminal unit shall vary primary airflow to raise/lower zone temperature to its occupied setpoint. The RTU shall modulate the bypass damper to maintain duct static pressure at setpoint and modulate (or cycle) compressors or modulate (or stage) heat based on current zone cooling/heating demands. The OA damper shall remain closed, unless economizing.

#### **3. COOLING/HEATING CHANGEOVER LOGIC:**

The System Controller shall determine the overall system cooling/heating mode based on "voting" from each zone. When the majority of zones require cooling, the RTU shall operate in cooling mode and any zone that requires heating shall reduce primary airflow to minimum. When the majority of zones require heating, the RTU shall operate in heating mode and any zone that requires cooling shall reduce primary airflow to minimum.



**Oak Ridge**  
SCHOOLS

**Transportation Certifications 8/26/2024**

Rae Beasley  
Evan Beshures  
Jeffrey Burgess  
Anteja Cannon  
Walter Erbaugh  
Marla Ferguson  
Edward Ferreira  
Carol Fike  
Joy Gilmore  
Amber Gingery  
Dewanna Henderson  
Robin Ivey  
Matthew Kaminski  
Helen Kerr  
John Kopczynski  
Kimberley Medina-Lakin  
Jacqueline Moreno  
Lisa Nelson  
Debra Polisky  
Robert Powell  
Lewis Preston  
Heather Saccardi  
Joseph Salcido  
Darlene Schenck  
Jacob Sedgwick  
Joshua Sellers  
Clarence Threat  
Isaac Walton  
Michael Whitaker

**Transportation Certifications 9/11/24**

Albert Parker

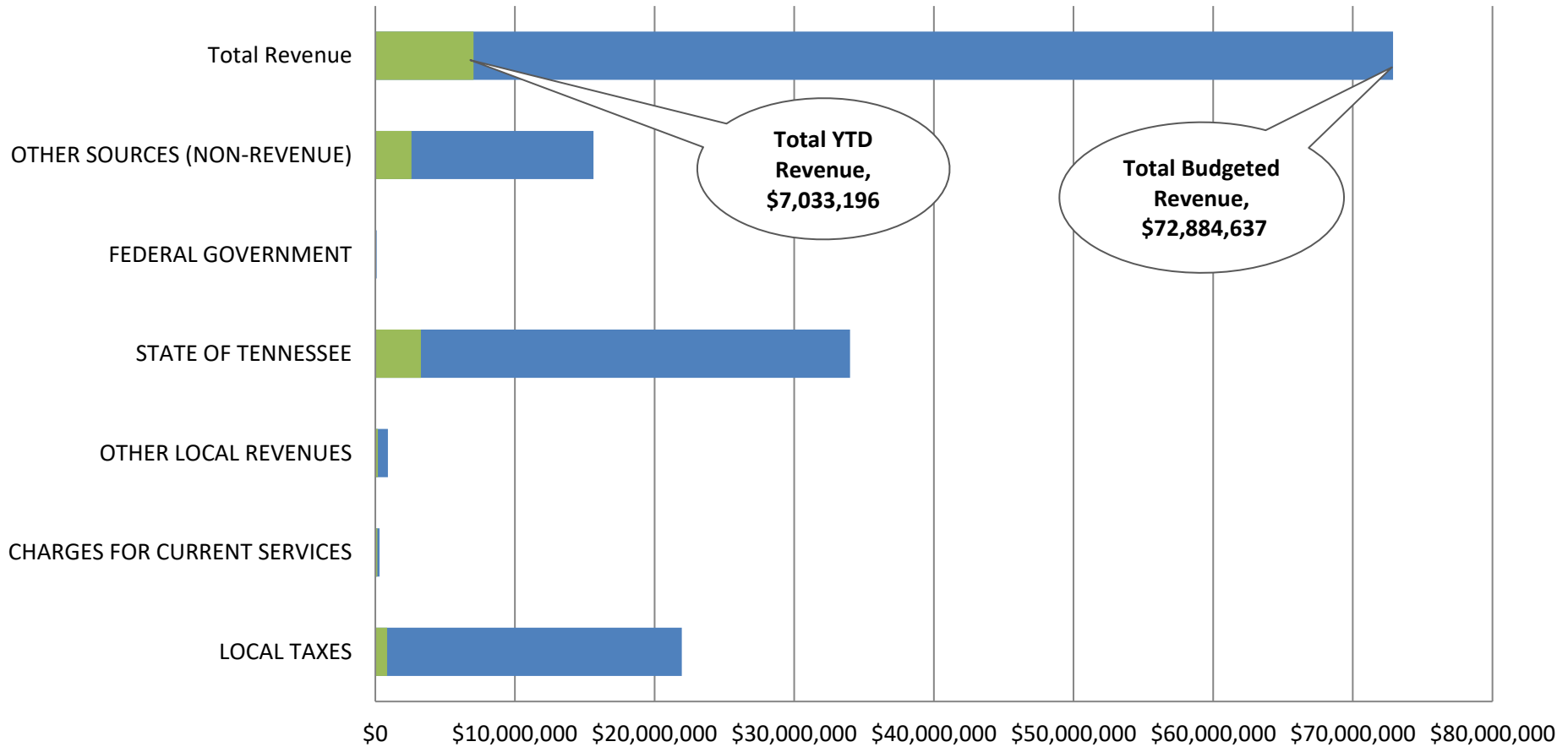
Acct	Acct	2024-25 FYTD Budget	August 2024-25 Monthly Activity	2024-25 Year-To-Date	2024-25 Percent of Budget	2024-25 Variance from Bud	Encumbered Amount	Unencumbered Budget Remaining
40110	Current Property Tax	13,189,000.00	822.22	822.22	0.01%	13,188,177.78		13,188,177.78
40210	Local Option Sales Tax	8,765,000.00	843,047.24	843,047.24	9.62%	7,921,952.76		7,921,952.76
40275	Mixed Drink Tax	350.00	75.72	75.72	21.63%	274.28		274.28
43511	Tuition - Regular Day Students	300,000.00	53,218.37	147,791.27	49.26%	152,208.73		152,208.73
43533	Transportation Fees	3,000.00		30.00	1.00%	2,970.00		2,970.00
44110	Interest Earned	600,000.00	76,338.53	158,022.56	26.34%	441,977.44		441,977.44
44120	Lease/Rentals	12,000.00	90.00	180.00	1.50%	11,820.00		11,820.00
44170	Miscellaneous Refunds	5,500.00	1,177.00	1,177.00	21.40%	4,323.00		4,323.00
44530	Sale of Equipment	25,000.00	3,944.99	4,000.19	16.00%	20,999.81		20,999.81
44570	Contributions & Gifts	223,992.94	5,433.94	7,433.94	3.32%	216,559.00		216,559.00
44990	Other Local Revenues	40,000.00	13,250.99	15,285.99	38.21%	24,714.01		24,714.01
46510	TN Investment in Student Achv	32,700,000.00	3,260,761.67	3,260,761.47	9.97%	29,439,238.53		29,439,238.53
46515	Early Childhood Education	545,414.00				545,414.00		545,414.00
46596	Paid Parental Leave	100,000.00				100,000.00		100,000.00
46610	Career Ladder Program	76,000.00				76,000.00		76,000.00
46790	Other Vocational	225,622.41	6,300.00	6,300.00	2.79%	219,322.41		219,322.41
46980	Other State Grants	348,043.65				348,043.65		348,043.65
47630	Public Law 874 - Maint/Operat.	20,000.00				20,000.00		20,000.00
47640	ROTC Reimbursement	78,310.00				78,310.00		78,310.00
49700	Insurance Recovery	8,441.00		5,941.00	70.38%	2,500.00		2,500.00
49800	Transfers In	125,000.00				125,000.00		125,000.00
49810	City General Fund Transfer	15,493,963.00	1,291,163.58	2,582,327.16	16.67%	12,911,635.84		12,911,635.84
-----	Revenue	72,884,637.00	5,555,624.25	7,033,195.76	9.65%	65,851,441.24		65,851,441.24
=====								
71100	Regular Instruction Prgm	32,108,176.00	2,728,989.49	3,172,737.40	9.88%	28,935,438.60	26,616,617.92	2,318,820.68
71150	Alternative Instruction Prgm	937,527.00	70,930.35	74,946.40	7.99%	862,580.60	824,881.64	37,698.96
71200	Special Education Prgm	5,951,831.41	449,245.22	457,915.12	7.69%	5,493,916.29	5,086,702.97	407,213.32
71300	Career/Technical Education Prg	2,399,352.41	160,917.81	185,497.96	7.73%	2,213,854.45	1,844,518.36	369,336.09
71900	Contingency	773,232.63				773,232.63		773,232.63
72120	Health Services	832,180.00	62,320.59	70,992.60	8.53%	761,187.40	516,714.93	244,472.47
72130	Other Student Support	2,073,981.00	164,934.02	271,648.84	13.10%	1,802,332.16	1,473,068.15	329,264.01
72210	Regular Inst. Support	5,147,189.00	306,248.39	462,251.72	8.98%	4,684,937.28	2,730,749.86	1,954,187.42
72220	Special Education Support	976,906.00	60,093.30	97,181.24	9.95%	879,724.76	732,740.82	146,983.94
72230	Career & Technical Prg Support	280,705.77	16,771.79	39,740.01	14.16%	240,965.76	181,314.31	59,651.45
72250	Technology Services	3,004,493.90	282,471.64	582,988.62	19.40%	2,421,505.28	1,815,240.57	606,264.71
72260	Adult Programs	30,221.00	2,892.40	2,892.40	9.57%	27,328.60	38,690.37	-11,361.77
72290	Communications	232,729.75	11,914.11	39,591.24	17.01%	193,138.51	105,675.70	87,462.81
72310	Board of Education	1,308,649.00	41,596.04	419,665.93	32.07%	888,983.07	11,829.13	877,153.94

Acct	Acct	2024-25 FYTD Budget	August 2024-25 Monthly Activity	2024-25 Year-To-Date	2024-25 Percent of Budget	2024-25 Variance from Bud	2024-25 Encumbered Amount	Unencumbered Budget Remaining
72320	Director of Schools	409,022.00	31,171.01	74,805.47	18.29%	334,216.53	322,342.99	11,873.54
72410	Office of the Principal	4,506,336.50	353,943.96	710,178.09	15.76%	3,796,158.41	3,830,753.77	-34,595.36
72510	Fiscal Services	1,078,828.00	71,928.50	181,477.84	16.82%	897,350.16	769,650.02	127,700.14
72520	Human Resources/ Personnel	511,168.00	74,708.39	114,077.37	22.32%	397,090.63	348,179.30	48,911.33
72610	Operation of Plant	5,273,655.28	431,795.92	902,408.14	17.11%	4,371,247.14	2,045,864.53	2,325,382.61
72620	Maintenance of Plant	2,250,852.71	204,003.12	375,289.37	16.67%	1,875,563.34	1,269,583.57	605,979.77
72710	Transportation	2,038,005.00	10,699.98	89,077.05	4.37%	1,948,927.95		1,948,927.95
73400	Early Childhood Education	455,414.00	31,628.60	31,628.60	6.95%	423,785.40	379,789.75	43,995.65
73401	Pre-K General Fund	921,939.00	56,923.31	91,510.60	9.93%	830,428.40	618,502.97	211,925.43
76100	Regular Capital Outlay	2,073,549.47	19,342.80	402,087.23	19.39%	1,671,462.24	170,465.94	1,500,996.30
82130	Education Principal on Debt	6,877.00				6,877.00		6,877.00
82230	Education Interest on Debt	123.00				123.00		123.00
99100	Transfers Out	126,015.17				126,015.17		126,015.17
-----	Expense	75,708,960.00	5,645,470.74	8,850,589.24	11.69%	66,858,370.76	51,733,877.57	15,124,493.19
-----	General Purpose School Fund	-2,824,323.00	-89,846.49	-1,817,393.48	10.69%	-1,006,929.52	-51,733,877.57	50,726,948.05
	Grand Revenue Totals	72,884,637.00	5,555,624.25	7,033,195.76	9.65%	65,851,441.24		65,851,441.24
	Grand Expense Totals	75,708,960.00	5,645,470.74	8,850,589.24	11.69%	66,858,370.76	51,733,877.57	15,124,493.19
	Grand Totals	2,824,323.00	89,846.49	1,817,393.48	64.35%	1,006,929.52	51,733,877.57	50,726,948.05
		Loss	Loss	Loss		Loss	Loss	Profit

Number of Accounts: 1256

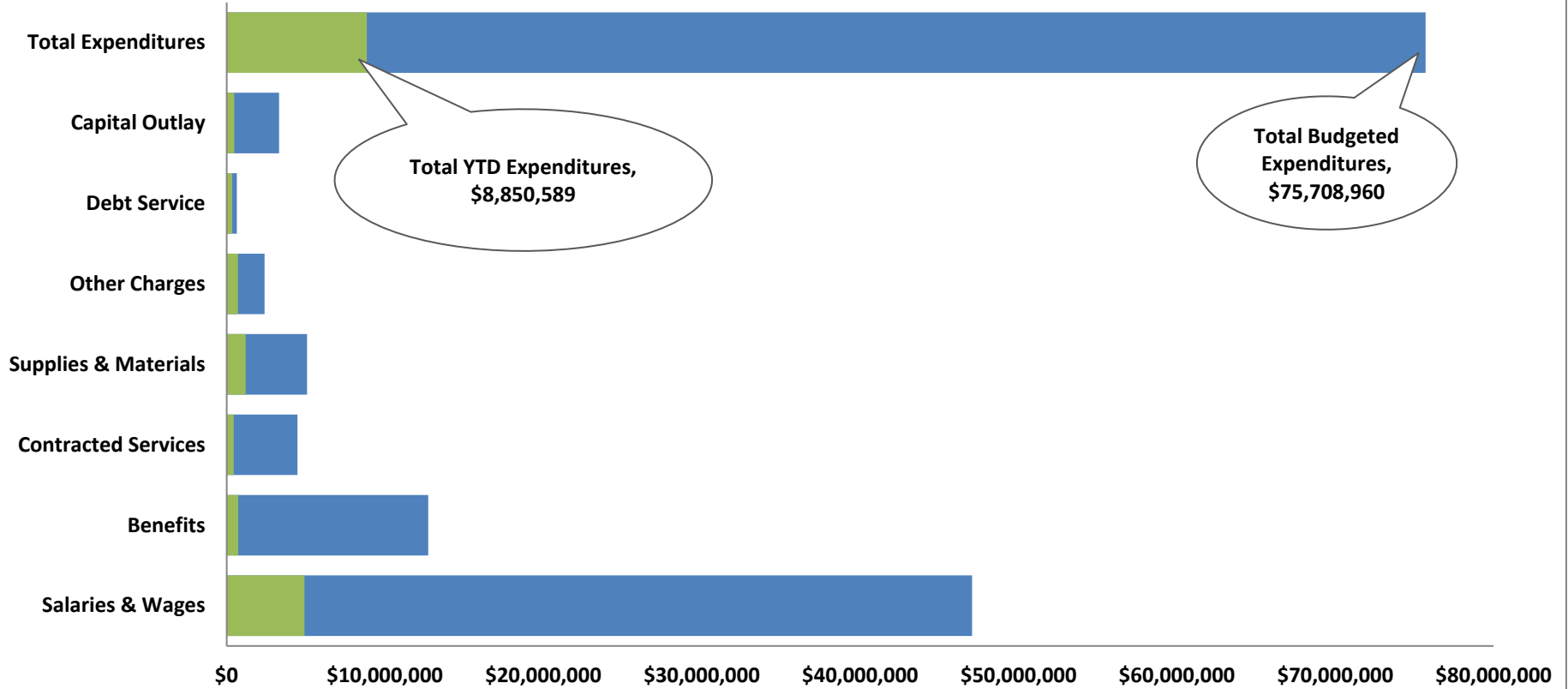
\*\*\*\*\* End of report \*\*\*\*\*

## General Fund Revenue Budget to Actual Summary - August, 2024



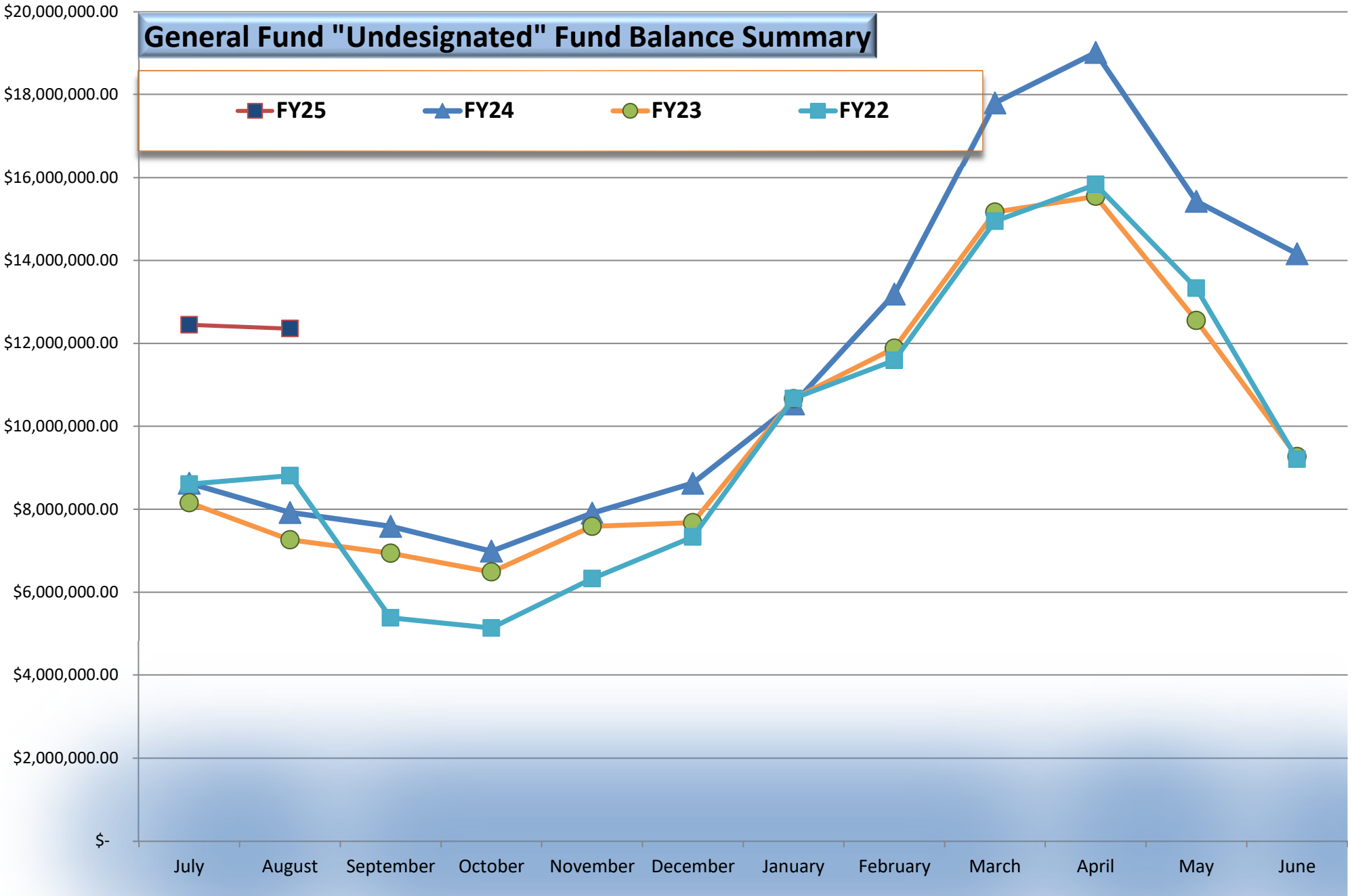
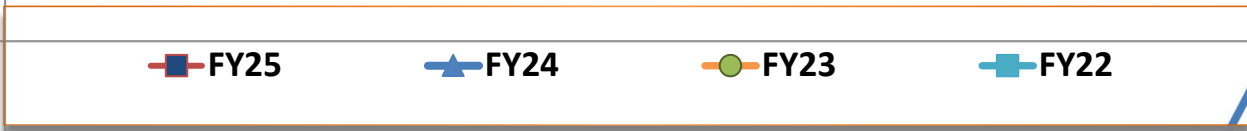
	LOCAL TAXES	CHARGES FOR CURRENT SERVICES	OTHER LOCAL REVENUES	STATE OF TENNESSEE	FEDERAL GOVERNMENT	OTHER SOURCES (NON-REVENUE)	Total Revenue
■ Percent of Budget	3.84%	48.79%	20.53%	9.61%	0%	16.56%	9.65%
■ Year-To-Date	843,945.18	147,821.27	186,099.68	3,267,061.47	0	2,588,268.16	\$7,033,196
■ FYTD Budget	21,954,350.00	303,000.00	906,492.94	33,995,080.06	98,310.00	15,627,404.00	\$72,884,637

## General Fund Expenditure Budget to Actual Summary by Object August, 2024



	Salaries & Wages	Benefits	Contracted Services	Supplies & Materials	Other Charges	Debt Service	Capital Outlay	Total Expenditures
<b>FYTD %</b>	10.43%	5.74%	10%	23.74%	30.04%	54.33%	14.67%	11.69%
<b>FYTD Activity</b>	4,910,771.82	731,061.77	448,707.22	1,205,370.11	720,731.63	350,000.00	483,946.69	\$8,850,589
<b>FYTD Revised Bdg</b>	47,073,501.00	12,727,844.00	4,473,813.31	5,077,993.90	2,399,443.80	644,205.00	3,312,158.99	\$75,708,960

# General Fund "Undesignated" Fund Balance Summary



Acct	Acct	2024-25 FYTD Budget	August 2024-25 Monthly Activity	2024-25 Year-To-Date	2024-25 Percent of Budget	2024-25 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
142	School Federal Projects							
R	Revenue							
47131	Vocational Program Improvement	130,674.10	11,425.63	11,425.63	8.74%	119,248.47		119,248.47
47141	Title I	900,000.00				900,000.00		900,000.00
47143	Special Education Grants	1,325,000.00				1,325,000.00		1,325,000.00
47145	Special Ed Pre-School Grants	38,000.00				38,000.00		38,000.00
47146	English Lang Acq Grants	24,500.00				24,500.00		24,500.00
47147	Title IV Part B, 21st Century	230,000.00				230,000.00		230,000.00
47189	Title II	167,500.00				167,500.00		167,500.00
47401	ESSER 3.0	92,066.24				92,066.24		92,066.24
47404	ARP Homeless Grant	35,000.00				35,000.00		35,000.00
47590	Other Federal Through State	824,259.66		4,993.65	0.61%	819,266.01		819,266.01
47990	Other Direct Fedral Revenue	1,050,440.00				1,050,440.00		1,050,440.00
-----	Revenue	4,817,440.00	11,425.63	16,419.28	0.34%	4,801,020.72		4,801,020.72
E	Expense							
71100	Regular Instruction Prgm	710,034.00	51,566.32	51,566.32	7.26%	658,467.68	621,969.05	36,498.63
71200	Special Education Prgm	1,048,852.00	67,855.31	67,855.31	6.47%	980,996.69	856,899.52	124,097.17
71300	Career/Technical Education Prg	106,400.00	34,815.58	43,125.58	40.53%	63,274.42	34,827.82	28,446.60
71900	Contingency	750,000.00				750,000.00		750,000.00
72120	Health Services	25,341.00	905.28	1,405.28	5.55%	23,935.72		23,935.72
72130	Other Student Support	219,004.24	16,940.11	80,706.45	36.85%	138,297.79	141,752.16	-3,454.37
72210	Regular Inst. Support	246,995.66	20,905.13	44,153.15	17.88%	202,842.51	236,904.10	-34,061.59
72220	Special Education Support	359,842.00	27,803.34	32,843.22	9.13%	326,998.78	293,842.42	33,156.36
72230	Career & Technical Prg Support	4,641.00	213.79	463.34	9.98%	4,177.66	29.88	4,147.78
72250	Technology Services	11,221.00	1,103.94	1,155.92	10.30%	10,065.08	22,628.56	-12,563.48
73100	Food Service						2,000.00	-2,000.00
73300	Community Services	1,204,920.00	93,072.78	133,467.35	11.08%	1,071,452.65	816,456.70	254,995.95
99100	Transfers Out	130,189.10				130,189.10		130,189.10
-----	Expense	4,817,440.00	315,181.58	456,741.92	9.48%	4,360,698.08	3,027,310.21	1,333,387.87
-----	School Federal Projects		-303,755.95	-440,322.64	4.91%	440,322.64	-3,027,310.21	3,467,632.85

Acct	Acct	2024-25 FYTD Budget	August 2024-25 Monthly Activity	2024-25 Year-To-Date	2024-25 Percent of Budget	2024-25 Variance from Bud	2024-25 Encumbered Amount	Unencumbered Balance Remaining
143	Central Cafeteria							
R	Revenue							
43521	Lunch Payments - Children	270,000.00	28,052.55	37,958.00	14.06%	232,042.00		232,042.00
43522	Lunch Payments - Adults	3,500.00	292.50	337.50	9.64%	3,162.50		3,162.50
43523	Income From Breakfast	40,000.00	4,434.90	5,605.20	14.01%	34,394.80		34,394.80
43525	A la Carte Sales	85,000.00	17,526.80	30,361.17	35.72%	54,638.83		54,638.83
43990	Other Charges for Food Service	50,000.00	13,349.69	15,482.19	30.96%	34,517.81		34,517.81
44110	Interest Earned	35,000.00	2,800.73	5,663.67	16.18%	29,336.33		29,336.33
46520	School Food Service	20,560.00				20,560.00		20,560.00
47111	USDA School Lunch Program	1,225,212.00				1,225,212.00		1,225,212.00
47112	USDA Commodities	155,000.00				155,000.00		155,000.00
47113	Breakfast	340,000.00				340,000.00		340,000.00
47114	USDA - Other	320,000.00	28,974.12	35,820.17	11.19%	284,179.83		284,179.83
-----	Revenue	2,544,272.00	95,431.29	131,227.90	5.16%	2,413,044.10		2,413,044.10
E	Expense							
73100	Food Service	3,326,290.45	5,472.18	63,991.32	1.92%	3,262,299.13	114,363.42	3,147,935.71
-----	Expense	3,326,290.45	5,472.18	63,991.32	1.92%	3,262,299.13	114,363.42	3,147,935.71
-----	Central Cafeteria	-782,018.45	89,959.11	67,236.58	3.33%	-849,255.03	-114,363.42	-734,891.61
		=====	=====	=====	=====	=====	=====	=====
145	Other Education Funds							
R	Revenue							
44990	Other Local Revenues	35,000.00	1,200.00	5,500.00	15.71%	29,500.00		29,500.00
49800	Transfers In	124,434.00				124,434.00		124,434.00
-----	Revenue	159,434.00	1,200.00	5,500.00	3.45%	153,934.00		153,934.00

Acct	Acct	2024-25 FYTD Budget	August 2024-25 Monthly Activity	2024-25 Year-To-Date	2024-25 Percent of Budget	2024-25 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
145	Other Education Funds							
E	Expense							
73300	Community Services	159,434.00	11,851.70	15,939.36	10.00%	143,494.64	2,591.95	140,902.69
-----	Expense	159,434.00	11,851.70	15,939.36	10.00%	143,494.64	2,591.95	140,902.69
-----	Other Education Funds		-10,651.70	-10,439.36	6.72%	10,439.36	-2,591.95	13,031.31
=====								
146	Extended School Program							
R	Revenue							
43581	Community Services Fees Child	497,695.00	55,260.00	100,793.35	20.25%	396,901.65		396,901.65
-----	Revenue	497,695.00	55,260.00	100,793.35	20.25%	396,901.65		396,901.65
E	Expense							
73300	Community Services	495,592.00	34,478.91	63,984.39	12.91%	431,607.61	271,918.43	159,689.18
99100	Transfers Out	10,000.00				10,000.00		10,000.00
-----	Expense	505,592.00	34,478.91	63,984.39	12.66%	441,607.61	271,918.43	169,689.18
-----	Extended School Program	-7,897.00	20,781.09	36,808.96	16.42%	-44,705.96	-271,918.43	227,212.47
=====								
Grand Revenue Totals		8,018,841.00	163,316.92	253,940.53	3.17%	7,764,900.47		7,764,900.47
Grand Expense Totals		8,808,756.45	366,984.37	600,656.99	6.82%	8,208,099.46	3,416,184.01	4,791,915.45
Grand Totals		789,915.45	203,667.45	346,716.46	43.89%	443,198.99	3,416,184.01	2,972,985.02
		Loss	Loss	Loss		Loss	Loss	Profit

Number of Accounts: 330

## Combined Fund Balance and YTD Operating Statement Summary

**August, 2024**

Description	General Fund 141	Federal Fund 142	Food Service Fund 143	Special Fund 145	ECC Fund 146
<b>Beginning Fund Balance July 1, 2024</b>	20,036,067.15	0.00	1,695,609.24	27,731.99	323,595.26
Plus YTD Revenue per books 8/31/24	7,033,195.76	16,419.28	131,227.90	5,500.00	100,793.35
Less YTD Expenditures per books 8/31/24	(8,850,589.24)	(456,741.92)	(63,991.32)	(15,939.36)	(63,984.39)
<b>Revenues Over (Under) Expenditures as of 8/31/24</b>	<b>(1,817,393.48)</b>	<b>(440,322.64)</b>	<b>67,236.58</b>	<b>(10,439.36)</b>	<b>36,808.96</b>
<b>Ending Fund Balance per books as of 8/31/24</b>	<b>18,218,673.67</b>	<b>(440,322.64)</b>	<b>1,762,845.82</b>	<b>17,292.63</b>	<b>360,404.22</b>

### Fund Balance Restricted/Committed/Assigned Status

Encumbrances and Deferred Revenue	\$ -		\$ 64,320.64		
Inventory					
Restricted for Career Ladder Program	277.57				
Restricted for Operation of Non-Instructional Services (CCI)	16,200.00		948,525.18		360,404.22
Committed for Other Purposes (Vehicles- ERR Fund)	0.00				
Committed for Other Purposes (Device Replacement)	3,000,000.00				
Assigned for Instruction- Coordinated School Health	1,285.59				
Assigned for other local grants					
Assigned for Instruction - Education Foundation Grant	10,629.84				
Assigned for Instruction (APSI-ORHS)	7,207.22				
Assigned for Support Services FRC Local Funds (56)				17,292.63	
Nonspendable-Prepaid Expenditures					
<b>Assigned to Balance FY25 Budget</b>	<b>2,824,323.00</b>	<b>0.00</b>	<b>750,000.00</b>		
<b>Unassigned Fund Balance 8/31/24</b>	<b>\$ 12,358,750.45</b>	<b>-440,322.64</b>	<b>0.00</b>	<b>0.00</b>	
<b>Total Fund Balance 8/31/24</b>	<b>\$ 18,218,673.67</b>	<b>\$ (440,322.64)</b>	<b>\$ 1,762,845.82</b>	<b>\$ 17,292.63</b>	<b>\$ 360,404.22</b>

**Oak Ridge Schools**

**1st Attendance Period**

**September 7, 2024**

These numbers reflect the **2024-2025** Skyward Student Management System (Entity) active student enrollment count as of **September 7, 2024**.

The total includes **12** private school and home-schooled students receiving Special Ed services.



# Oak Ridge Schools

## Enrollment Entity Counts 1st RP 2024-25

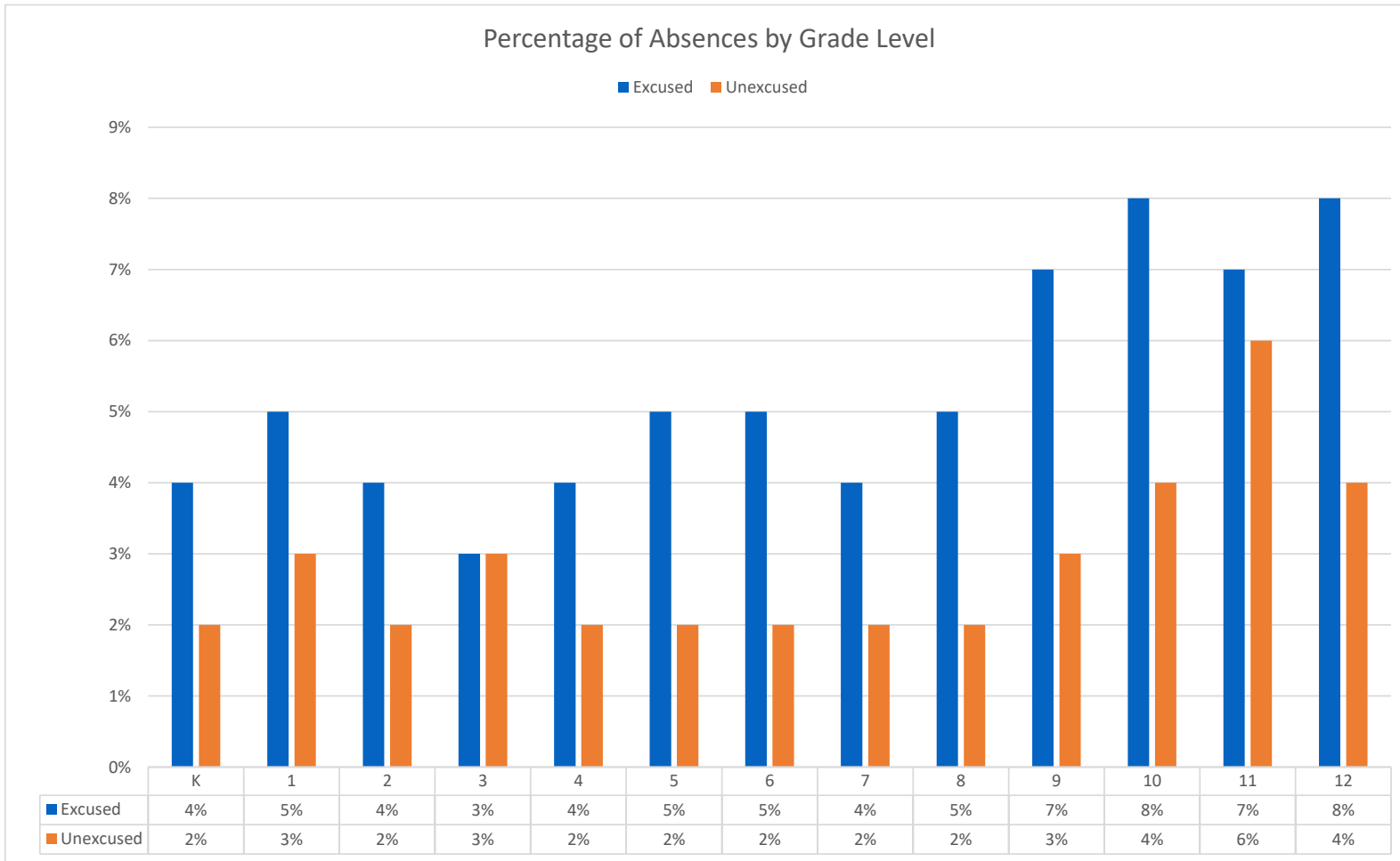
September 7, 2024

School	P3	P4	K	1	2	3	4	5	6	7	8	9	10	11	12	Total PK-12 2024-25	Previous 9th RP 2023-24	Diff	Total PK-12 2023-24
Preschool	81	133														214	249	-35	223
Glenwood			81	68	82	80	67									378	366	12	364
Linden			96	107	106	110	102									521	522	-1	524
Willow Brook			72	94	77	79	91									413	431	-18	419
Woodland			74	75	80	99	97									425	464	-39	444
JMS								183	177	189	172					721	729	-8	702
RMS								203	200	179	187					769	748	21	752
ORHS												447	419	411	370	1647	1550	97	1604
<b>Enrollment 2024-25</b>	<b>81</b>	<b>133</b>	<b>323</b>	<b>344</b>	<b>345</b>	<b>368</b>	<b>357</b>	<b>386</b>	<b>377</b>	<b>368</b>	<b>359</b>	<b>447</b>	<b>419</b>	<b>411</b>	<b>370</b>	<b>5088</b>	<b>5059</b>	<b>29</b>	<b>5032</b>
Prev. 9th RP 2023-24	129	120	353	346	364	348	372	365	361	338	413	407	403	378	362	5059			
Difference	-48	13	-30	-2	-19	20	-15	21	16	30	-54	40	16	33	8	29			

This report compares the 2024-25 1st RP period enrollment with the 2023-24 9th RP period.

# Attendance Graphs

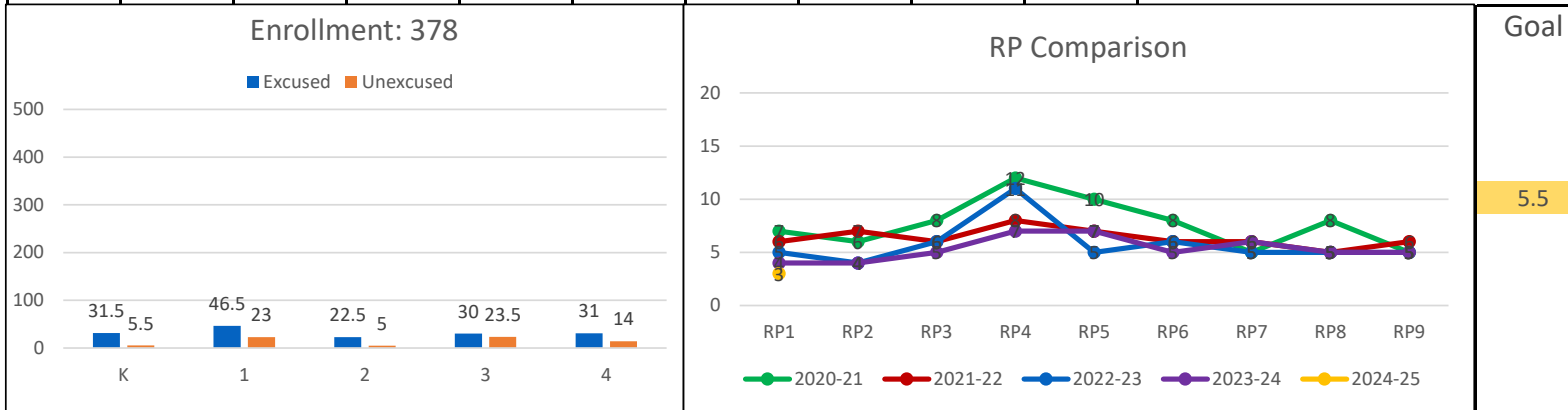
The graphs below display excused and unexcused absence totals, entity counts, and attendance percentages by grade and reporting period.  
 The data was compiled using information from attendance detail and summary reports and entity counts reports.  
 Reporting Period 1: 7/22/2024-8/19/2024



\* Percentages have been rounded to the nearest whole number.

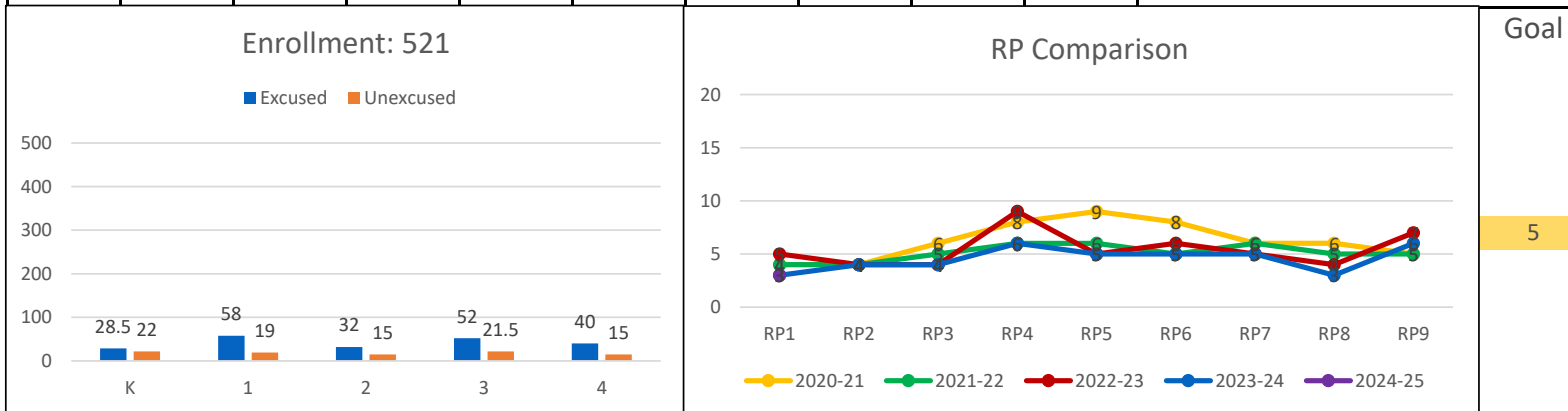
2020-21	RP1: 7.3%	RP2: 5.8%	RP3: 8.1%	RP4: 11.6%	RP5: 9.9%	RP6: 7.5%	RP7: 5.3%	RP8: 8%	RP9: 5.4%
2021-22	RP1: 6.3%	RP2: 6.7%	RP3: 6.3%	RP4: 7.7%	RP5: 6.9%	RP6: 5.8%	RP7: 6.3%	RP8: 8%	RP9: 5.9%
2022-23	RP1: 4.9%	RP2: 4.4%	RP3: 5.5%	RP4: 11%	RP5: 4.7%	RP6: 6.1%	RP7: 4.8%	RP8: 4.9%	RP9: 4.9%
2023-24	RP1: 4.3%	RP2: 4.2%	RP3: 5%	RP4: 7%	RP5: 6.9%	RP6: 5.1%	RP7: 6.2%	RP8: 4.7%	RP9: 4.5%
2024-25	RP1: 3.3%								

# Glenwood



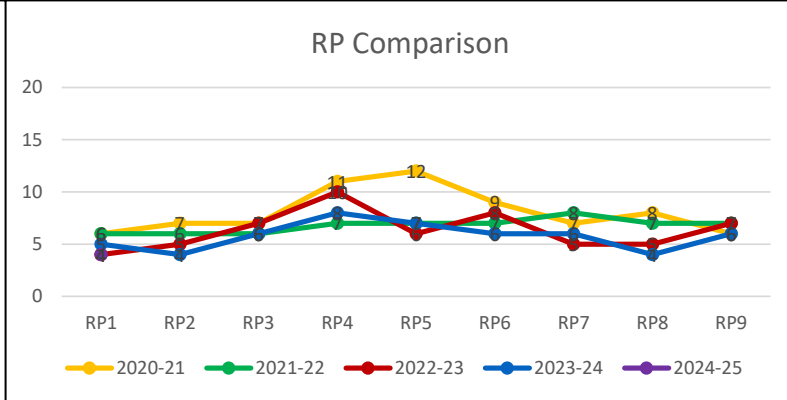
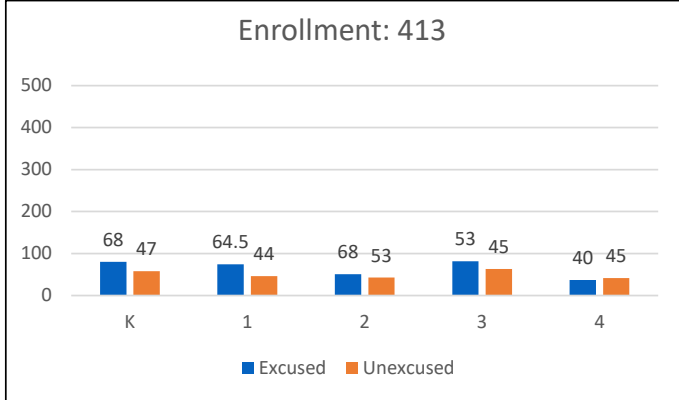
2020-21	RP1: 4.3%	RP2: 4.3%	RP3: 6.1%	RP4: 7.7%	RP5: 9.1%	RP6: 7.9%	RP7: 6.2%	RP8: 5.6%	RP9: 5.3%
2021-22	RP1: 4.4%	RP2: 4.2%	RP3: 4.8%	RP4: 6.4%	RP5: 5.8%	RP6: 4.6%	RP7: 5.5%	RP8: 5.4%	RP9: 5%
2022-23	RP1: 3.2%	RP2: 4%	RP3: 4.4%	RP4: 8.9%	RP5: 5.4%	RP6: 5.8%	RP7: 4.5%	RP8: 4.1%	RP9: 7.1%
2023-24	RP1: 3.3%	RP2: 3.7%	RP3: 4.1%	RP4: 5.8%	RP5: 4.8%	RP6: 4.8%	RP7: 4.7%	RP8: 3.3%	RP9: 5.8%
2024-25	RP1: 3.0%								

# Linden



2020-21	RP1: 6.1%	RP2: 7.1%	RP3: 7.3%	RP4: 11%	RP5: 11.7%	RP6: 8.9%	RP7: 6.9%	RP8: 7.5%	RP9: 6.4%
2021-22	RP1: 6.1%	RP2: 6%	RP3: 6.4%	RP4: 6.9%	RP5: 6.6%	RP6: 6.5%	RP7: 8%	RP8: 6.6%	RP9: 7.4%
2022-23	RP1: 3.6%	RP2: 4.7%	RP3: 7%	RP4: 10%	RP5: 6.4%	RP6: 8.1%	RP7: 5.3%	RP8: 5.3%	RP9: 6.9%
2023-24	RP1: 4.9%	RP2: 4.4%	RP3: 5.5%	RP4: 7.7%	RP5: 7%	RP6: 5.9%	RP7: 6.2%	RP8: 4.3%	RP9: 6.3%
2024-25	RP1: 4.4%								

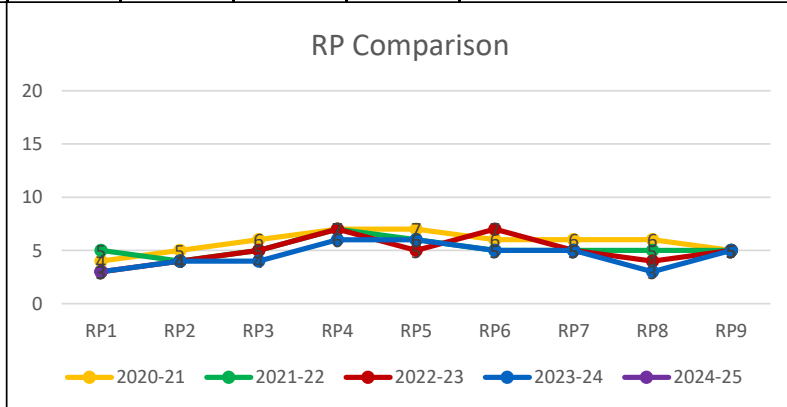
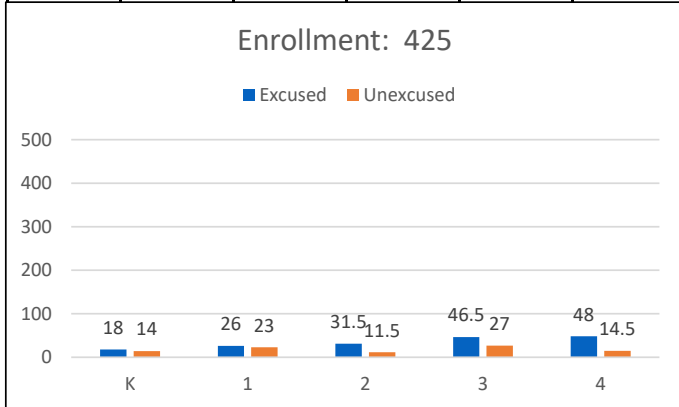
# Willow Brook



Goal
6

2020-21	RP1: 4.1%	RP2: 4.9%	RP3: 6.2%	RP4: 7.1%	RP5: 7.1%	RP6: 5.9%	RP7: 5.5%	RP8: 5.9%	RP9: 5.3%
2021-22	RP1: 4.5%	RP2: 4.1%	RP3: 4.8%	RP4: 6.7%	RP5: 5.9%	RP6: 5%	RP7: 4.7%	RP8: 4.5%	RP9: 5.2%
2022-23	RP1: 2.6%	RP2: 3.7%	RP3: 5.2%	RP4: 6.6%	RP5: 4.5%	RP6: 6.7%	RP7: 5.4%	RP8: 3.7%	RP9: 4.9%
2023-24	RP1: 3.1%	RP2: 3.5%	RP3: 4.3%	RP4: 6.2%	RP5: 5.6%	RP6: 5.2%	RP7: 5.2%	RP8: 2.9%	RP9: 4.5%
2024-25	RP1: 3.1%								

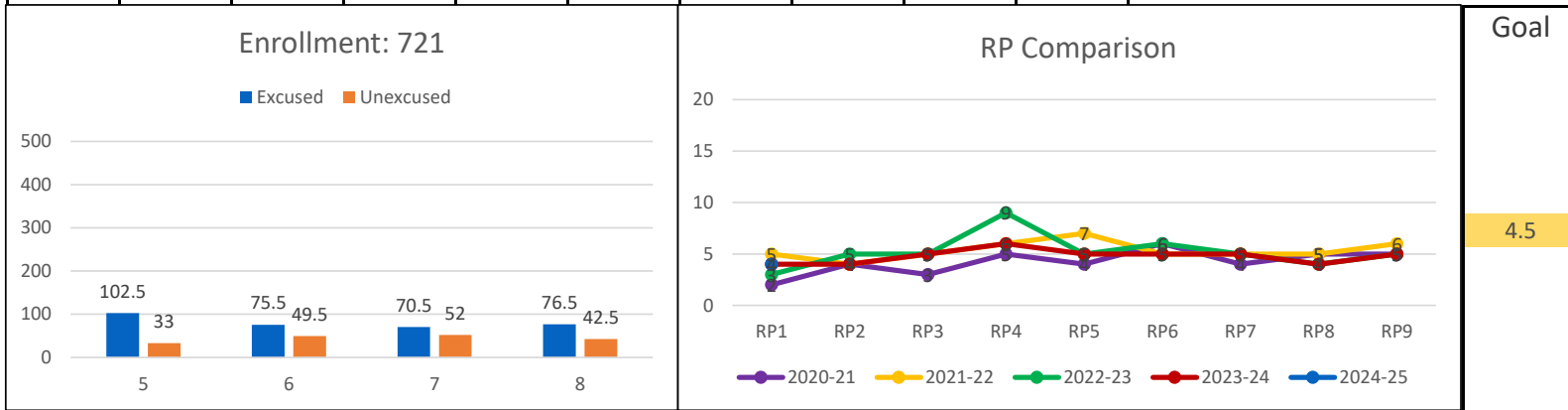
# Woodland



Goal
4

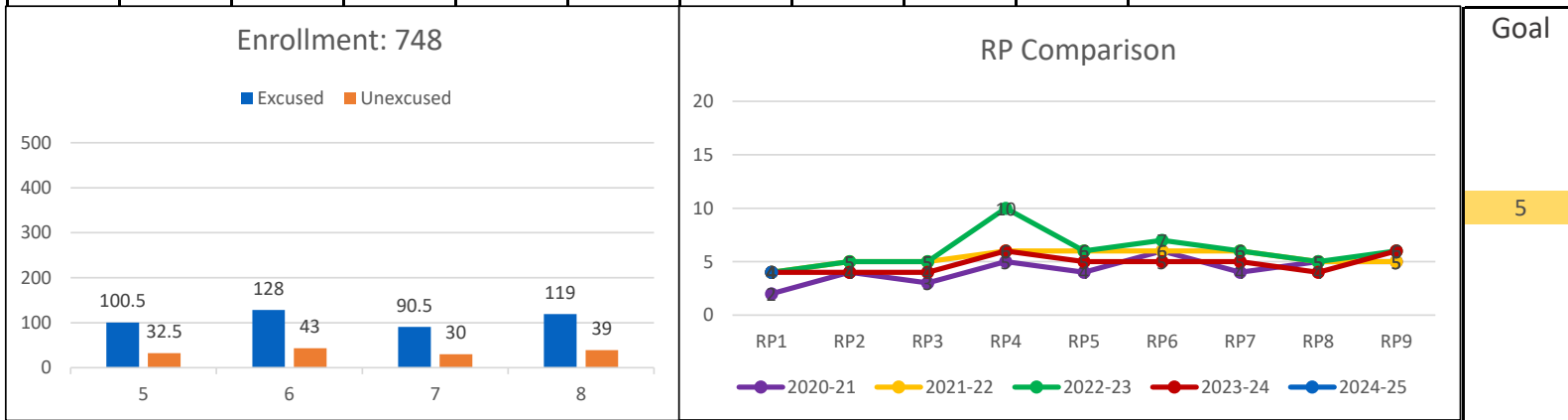
2020-21	RP1: 2.2%	RP2: 4.1%	RP3: 3.4%	RP4: 4.5%	RP5: 3.8%	RP6: 5.7%	RP7: 3.7%	RP8: 5.1%	RP9: 4.7%
2021-22	RP1: 5.1%	RP2: 4.2%	RP3: 4.9%	RP4: 5.9%	RP5: 6.8%	RP6: 5.4%	RP7: 5.3%	RP8: 4.9%	RP9: 6.1%
2022-23	RP1: 3.1%	RP2: 4.6%	RP3: 5%	RP4: 8.7%	RP5: 4.7%	RP6: 5.5%	RP7: 5.1%	RP8: 4.3%	RP9: 5.3%
2023-24	RP1: 3.8%	RP2: 4.4%	RP3: 4.5%	RP4: 5.6%	RP5: 5.3%	RP6: 5.3%	RP7: 5.1%	RP8: 4%	RP9: 5.3%
2024-25	RP1: 3.6%								

# Jefferson



2020-21	RP1: 2%	RP2: 2.3%	RP3: 3.4%	RP4: 4%	RP5: 2.7%	RP6: 3.3%	RP7: 2.8%	RP8: 5.6%	RP9: 5.1%
2021-22	RP1: 4.2%	RP2: 4.7%	RP3: 5.4%	RP4: 5.8%	RP5: 5.9%	RP6: 5.5%	RP7: 5.6%	RP8: 5%	RP9: 5.3%
2022-23	RP1: 4.4%	RP2: 4.5%	RP3: 5.4%	RP4: 9.7%	RP5: 6.1%	RP6: 6.8%	RP7: 5.5%	RP8: 4.8%	RP9: 5.8%
2023-24	RP1: 3.9%	RP2: 4.2%	RP3: 4.4%	RP4: 5.8%	RP5: 4.8%	RP6: 5.2%	RP7: 5.1%	RP8: 4%	RP9: 6.2%
2024-25	RP1: 3.9%								

# Robertsville



2020-21	RP1: 3.6%	RP2: 4.6%	RP3: 5.5%	RP4: 9.9%	RP5: 6.8%	RP6: 3.8%	RP7: 5.8%	RP8: 7.1%	RP9: 5.1%
2021-22	RP1: 7.2%	RP2: 6.2%	RP3: 6.9%	RP4: 7.3%	RP5: 9.2%	RP6: 8.2%	RP7: 7%	RP8: 8.2%	RP9: 6%
2022-23	RP1: 6%	RP2: 6.3%	RP3: 6.6%	RP4: 9.8%	RP5: 6.6%	RP6: 8.7%	RP7: 6.5%	RP8: 8.2%	RP9: 6.3%
2023-24	RP1: 5.8%	RP2: 6.3%	RP3: 7.1%	RP4: 8.7%	RP5: 6.4%	RP6: 7.3%	RP7: 6.9%	RP8: 8.3%	RP9: 7.3%
2024-25	RP1: 6.2%								

# ORHS

