

2024 AGENDA ITEM

Utility Commission Meeting Date: 8/15/2024

ITEM: WWTP – HVAC Semi Annual PM and T&M Contract or FULL-Service Contract

DETAILED DESCRIPTION OF SUBJECT MATTER:

The WWTP has a number of assets that are able to be serviced by Bassett Mechanical in a PM and Service contract. The assets include all HVAC units, boilers, water heaters, back flow preventers, and others. Due to the fact our WWTP has yet to asset manage any of the assets that have been installed in the plant our PM records are vague at best. Bassett Mechanical will provide Columbus Utilities with a PM Service Plan that in the first year will provide two PM checks and services to what is needed as well as provide repairs for any calls not to exceed \$39,036 for the year 2025. Following the first year you will see that Bassett has provided two options, a full-service agreement which will cover any and all PM's which will be done quarterly as well as any replacements or repairs needed regardless of the cost, yet we will pay no more than \$37,404 for the next two years. This value can be adjusted if we do not reach the original \$30,000 in T&M allocated budget; this is the Combination Option. The other option is the Semi-Annual Agreement which as you will see is the same \$39,036 for year 1, \$39,312 for year 2, and \$34,988 for year 3; these values are "not to exceed."

It is the recommendation of the Director that the Combination Agreement be selected and the contract signed for 2025. Before budgeting for 2026 the plan can be revisited and the cost for the "full service" portion of the contract can be adjusted, yet in the event our repairs exceed this value we will still be honored in paying the contracted rate, no more.

LIST ALL SUPPORTING DOCUMENTATION ATTACHED:

1. Bassett Mechanical – Combination Agreement
2. Bassett Mechanical – Semi-Annual Agreement

ACTION REQUESTED OF COMMISSION:

Discuss and Approval of Directors Recommendation



**BASSETT
MECHANICAL**

▪ CONTRACTING ▪ ENGINEERING
▪ METAL FABRICATING ▪ SERVICE



Partnering Together with Bassett Mechanical

HVAC Solutions

Prepared For:
Columbus Utilities
537 River Road
Columbus, Wisconsin 53925

Date: 8/8/2024
Proposal Number: P03463

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MAINTENANCE AGREEMENT FOR BUILDING ENVIRONMENTAL SYSTEMS

Company

Bassett Mechanical
4017 Owl Creek Drive
Madison, WI 53718

Proposal Date: 8/8/2024

Proposal Number: P03463

Agreement Number:

Ph: 920-462-1894

Fax: 920-759-2525

Bill To Identity	Agreement Location
Columbus Utilities 950 Maple Avenue Columbus, Wisconsin 53925 Attn: Jacob Holbert Jeremy Roll	Columbus Wastewater Treatment Plant 537 River Road Columbus, Wisconsin 53925 Attn: Jacob Holbert Jeremy Roll

Bassett Mechanical will provide the services described in the maintenance program indicated below.

MAINTENANCE PROGRAM: CPMII/GPM+ **SCHEDULES:** *Equipment Schedule *Air Filter Service

Agreement coverage will commence on 1/1/2025.

This is a combination Maintenance Agreement with Time and Material accounted for. The pricing structure can be found on **Page 19**. Year One Maintenance Only pricing **\$9,036.00** payable in advanced installments of \$9,036.00 per year beginning on the effective date of 1/1/2025 through 12/31/2025. Accompanying this maintenance program will be a \$30,000 Time and Materials allowance for repairs and replacements for a total approved budget to be exceed **\$39,036.00** in year one.

In year two, this maintenance agreement will convert to a combination Full Coverage Maintenance agreement. Covered units can be found on **Pages 7 through 9**. This Combination Full Coverage program will be **\$37,116.00**, payable in advanced installments of \$37,116.00 per year on the effective date of 1/1/2026 through 12/31/2027.

This proposal is the property of Contractor and is provided for Customer's use only. Contractor guarantees the price stated in this Agreement for thirty (30) days from the proposal date above. This proposal will become a binding Agreement only after acceptance by Customer and approved by an officer of Contractor as evidenced by their signatures below. This Agreement sets forth all of the terms and conditions binding upon the parties hereto; and no person has authority to make any claim, representation, promise, or condition on behalf of Contractor which is not expressed herein.

Company

Signature Sales Consultant

Accepted for Company by: Signature

Name & Title

Date / Phone / Fax

Customer

Signature (Authorized Representative)

Name (Print)

Title

Date

KAUKAUNA, WI (HQ)
1215 Hyland Ave.
Kaukauna, WI 54130

MILWAUKEE, WI
W136 N4829 Campbell Dr.
Menomonee Falls, WI 53051

MADISON, WI
4017 Owl Creek Dr.
Madison, WI 53718

WAUSAU, WI
4403 Stewart Ave., Suite B
Wausau, WI 54401

ROCHESTER, MN
570 High Point Dr. NE
Byron, MN 55920



www.BassettMechanical.com
(800) 236-2500



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GPM+/CPMII Program

This agreement provides the Customer with an ongoing, comprehensive maintenance agreement for the lifetime of the contract and all renewals thereof. This agreement will be initiated, scheduled, administered, monitored, and updated by the Service Provider. The service activities will be directed and scheduled, on a regular basis, by our comprehensive equipment maintenance scheduling system based on manufacturers' recommendations, equipment location, application, type, run time, and the Service Provider's own experience. The Customer is informed of the agreement's progress and results on a continuing basis via a detailed Service Report, presented after each service call for Customer's review, approval signature, and record.

GUARANTEED PROFESSIONAL MAINTENANCE PLUS: Complete coverage of all components and parts inside the HVAC equipment.

TEST AND INSPECT: On-site labor, travel labor, and travel and living expenses are required to visually INSPECT and TEST the equipment to determine its operating condition and efficiency. Typical activities include:

*TESTING for excessive vibration; motor winding resistance; refrigerant charge; fan RPM; refrigerant oil (acid); flue gas analysis; safety controls, combustion and draft; crankcase heaters; control system(s), etc.

*INSPECTING for worn, failed, or doubtful parts; mountings, drive couplings; oil level; rotation; soot; flame composition and shape; pilot and igniter; steam, water, oil, and/or refrigerant leaks, etc.

PREVENTIVE MAINTENANCE: On-site labor, travel labor, and travel and living expenses are required to clean, align, tighten, calibrate, adjust, and lubricate equipment. These activities are intended to extend the equipment's life and assure proper operating conditions and efficiency. Typical activities could include:

*CLEANING coil surfaces; electrical contacts; burner orifices; passages and nozzles; pilot and igniter; cooling tower baffles, basin, sump and float; chiller, condenser and boiler tubes, etc.

*ALIGNING belt drives; drive couplings; coil fins, etc.

*CALIBRATING safety controls; temperature and pressure controls, etc.

*TIGHTENING electrical connections; mounting bolts; refrigerant piping fittings; damper sections, etc.

*ADJUSTING belt tension; refrigerant charge; super heat; fan RPM; burner fuel/air ratios; gas pressure; set point of controls and limits; compressor cylinder unloaders; damper close-off; sump floats, etc.

*LUBRICATING motors; fan and damper bearings; valve stems; damper linkages; fan vane linkages, etc.

REPAIR AND REPLACE: On-site labor, travel labor, parts procurement labor (locating, ordering, expediting, and transporting), and travel and living expenses required to REPAIR or REMOVE AND REPLACE broken, worn and/or doubtful components and/or parts. This applies only to maintainable/moving components of the system.

TROUBLE CALLS: On-site labor and travel labor, including overtime, plus travel and living expenses required for unscheduled work resulting from an abnormal condition.

COMPONENTS, PARTS, AND SUPPLIES: The cost of COMPONENTS, PARTS, AND SUPPLIES required to keep the equipment operating properly and efficiently. (Refrigerant is only covered when a compressor is repaired/replaced. Any leak in the system is not covered unless stated in the agreement.)

PRIMARY TECHNICIAN: An assigned primary and secondary technician for your facility.

ASSIGNED PROJECT MANAGER: An Assigned HVAC Specialist to assist you with future planning, budgeting, system upgrades, and current project needs.



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DOCUMENTATION: On-going communication regarding the history of your equipment as well as current performance of the system thru service reports and Bassett's web based reporting platform.

GUARANTEED PROFESSIONAL MAINTENANCE PROGRAM TERMS AND CONDITIONS

1. Customer shall permit Contractor free and timely access to areas and equipment, and allow Contractor to start and stop the equipment as necessary to perform required services. All planned work under this Agreement will be performed during the Contractor's normal working hours.
2. In case of any failure to perform its obligations under this Agreement, Contractor's liability is limited to repair or replacement at its option and such repair or replacement shall be Customer's sole remedy. This warranty is conditioned upon proper operation and maintenance by Customer and shall not apply if the failure is caused or contributed to by accident, alteration, abuse or misuse, and shall not extend beyond the term of this Agreement.
3. The annual Agreement price is conditioned upon the system(s) covered being in a maintainable condition. If the initial inspection or initial seasonal start-up indicates repairs are required, a firm quotation will be submitted for Customer's approval. Should Customer not authorize the repairs, Contractor may either remove the unacceptable system(s) component(s) or part(s) from its scope of responsibility and adjust the annual Agreement price accordingly or cancel this Agreement.
4. This annual agreement shall continue in effect from year to year unless either party gives written notice to the other of intention not to renew thirty (30) days prior to any anniversary date.
5. The annual Agreement price is subject to adjustment on each commencement anniversary to reflect increases in labor, material and other costs.
6. Customer shall be responsible for all taxes applicable to the services and/or materials hereunder.
7. Customer will promptly pay invoices within thirty (30) days of receipt. Should a payment become thirty one (31) days or more delinquent, Contractor may stop all work under this Agreement without notice and/or cancel this Agreement, and the entire Agreement amount shall become due and payable immediately upon demand.
8. This Agreement applies only to the maintenance portions of the system(s). Repair or replacement of non-maintainable parts such as duct work, boiler shell and tubes, cabinets, boiler refractory material, heat exchangers, main power service and electrical wiring, piping, tube bundles, valve bodies, coils, structural supports, oil storage tanks, chimneys and similar items, as well as the cleaning of the interior of duct work and DDC controls and the replacement of refrigerant, refrigerant systems or refrigerant types due to system leaks or changes in laws/regulations, are excluded.
9. Any alteration to, or deviation from, this Agreement involving extra work, cost of materials or labor will become an extra charge (fixed price amount to be negotiated or on a time-and-material basis at Contractor's rates then in effect) over the sum stated in this Agreement.
10. Contractor will not be required to move, replace or alter any part of the building structure in the performance of this Agreement.
11. This Agreement does not include responsibility for the design of the system, obsolescence, safety test, removal and reinstallation of valve bodies, other than those associated with the equipment listed and dampers, repair or replacement necessitated by freezing weather, electrical power failure, low voltage, burned-out main or branch fuses, low water pressure, vandalism, misuse or abuse of the system(s), negligence of others (including Customer), failure of Customer to properly operate the system(s), requirements of governmental, regulatory or insurance agencies, or other causes beyond control of Contractor.
12. If a trouble call is made at Customer's request and inspection indicates a condition which is not covered under this Agreement, Contractor may charge Customer at the rate then in effect for such services.
13. Customer shall permit only Contractor's personnel or agent to perform the work included in the scope of this Agreement. Should anyone other than Contractor's personnel perform such work, Contractor may, at its option, cancel this Agreement or eliminate the involved item of equipment from inclusion in this Agreement.
14. In the event Contractor must commence legal action in order to recover any amount payable under this Agreement, Customer shall pay Contractor all court costs and attorneys' fees incurred by Contractor.
15. Any legal action against the Contractor relating to this Agreement, or the breach thereof, shall be commenced within one (1) year from the date of the work.
16. Contractor shall not be liable for any delay, loss, damage or detention caused by unavailability of machinery, equipment or materials, delay of carriers, strikes, including those by Contractor's employees, lockouts, civil or military authority, priority regulations, insurrection or riot, action of the elements, forces of nature, or by any cause beyond its control.
17. The Customer has the right to cancel this program at any time for any reason with a 30 day written notice of intent to cancel. If this action is taken, Bassett Mechanical may invoice at the preferred prevailing time and materials rates for any work that has been done which exceeds the amount(s) previously billed not to exceed the annual agreement price.
18. To the fullest extent permitted by law both customer and the contractor shall hold harmless the other party, its agent and employees from and against claims, damages, losses and expenses (including but not limited to attorney's fees) to the extent that such claim, damage, loss or expense is caused in whole or in part by an active or passive act or omission of the other party anyone directly or indirectly employed by that party, or anyone for whose acts that may be liable.
19. Customer shall make available to Contractor's personnel all pertinent Material Safety Data Sheets (MSDS) pursuant to OSHA'S Hazard Communication Standard Regulations.
20. Contractor expressly disclaims any and all responsibility and liability for the indoor air quality of the customer's facility, including without limitation injury or illness to occupants of the facility or third parties, arising out of or in connection with the Contractor's work under this agreement.
21. Contractor's obligation under this proposal and any subsequent contract does not include the identification, abatement or removal of asbestos or any other toxic or hazardous substances, hazardous wastes or hazardous materials. In the event such substances, wastes and materials are encountered, Contractor's sole obligation will be to notify the Owner of their existence. Contractor shall have the right thereafter to suspend its work until such substances, wastes or materials and the resultant hazards are removed. The time for completion of the work shall be extended to the extent caused by the suspension and the contract price equitably adjusted.
22. UNDER NO CIRCUMSTANCES, WHETHER ARISING IN CONTRACT, TORT (INCLUDING NEGLIGENCE), EQUITY OR OTHERWISE, WILL CONTRACTOR BE RESPONSIBLE FOR LOSS OF USE, LOSS OF PROFIT, INCREASED OPERATING OR MAINTENANCE EXPENSES, CLAIMS OF CUSTOMER'S TENANTS OR CLIENTS, OR ANY SPECIAL, INDIRECT OR CONSEQUENTIAL DAMAGES.

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1215 Hyland Ave.
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Menomonee Falls, WI 53051

MADISON, WI
4017 Owl Creek Dr.
Madison, WI 53718

WAUSAU, WI
4403 Stewart Ave., Suite B
Wausau, WI 54401

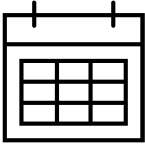
ROCHESTER, MN
570 High Point Dr. NE
Byron, MN 55920



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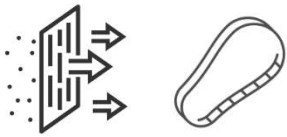
Scope of Work

Maintenance Intervals:



- In Year 1, Bassett will be onsite on a Semi-Annual basis.
- In Years 2 and 3, Bassett will be onsite on a Quarterly basis.

Filter and Belt Replacement:



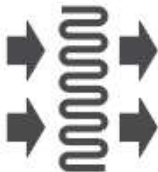
- Filters will be provided and replaced by Columbus Utilities
- Belts will be provided and replaced by Bassett Mechanical on an Annual basis.

Lifts:



- Lift rentals are not included in the scheduled preventative maintenance portion of this agreement.
- The sludge barn will require a lift once per year for maintenance on exhaust fans. It has been discussed that the city may have a boom lift available for Bassett Mechanical's use at that time.

Coil Cleaning:



- Condenser coil cleaning will be done by Bassett Mechanical on an Annual basis.

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2. In case of any failure to perform its obligations under this Agreement, Contractor's liability is limited to repair or replacement at its option and such repair or replacement shall be Customer's sole remedy. This warranty is conditioned upon proper operation and maintenance by Customer and shall not apply if the failure is caused or contributed to by accident, alteration, abuse or misuse, and shall not extend beyond the term of this Agreement.
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8. This Agreement applies only to the maintenance portions of the system(s). Repair or replacement of non-maintainable parts such as duct work, boiler shell and tubes, cabinets, boiler refractory material, heat exchangers, main power service and electrical wiring, piping, tube bundles, valve bodies, coils, structural supports, oil storage tanks, chimneys and similar items, as well as the cleaning of the interior of duct work and DDC controls and the replacement of refrigerant, refrigerant systems or refrigerant types due to system leaks or changes in laws/regulations, are excluded. Bassett Mechanical will cover up to forty (40) pounds of refrigerant cost directly related to a repair covered under this agreement.
9. Any alteration to, or deviation from, this Agreement involving extra work, cost of materials or labor will become an extra charge (fixed price amount to be negotiated or on a time-and-material basis at Contractor's rates then in effect) over the sum stated in this Agreement.
10. Contractor will not be required to move, replace or alter any part of the building structure in the performance of this Agreement.
11. This Agreement does not include responsibility for the design of the system, obsolescence, safety test, removal and reinstallation of valve bodies, other than those associated with the equipment listed and dampers, repair or replacement necessitated by freezing weather, electrical power failure, low voltage, burned-out main or branch fuses, low water pressure, vandalism, misuse or abuse of the system(s), negligence of others (including Customer), failure of Customer to properly operate the system(s), requirements of governmental, regulatory or insurance agencies, or other causes beyond control of Contractor.
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14. In the event Contractor must commence legal action in order to recover any amount payable under this Agreement, Customer shall pay Contractor all court costs and attorneys' fees incurred by Contractor.
15. Any legal action against the Contractor relating to this Agreement, or the breach thereof, shall be commenced within one (1) year from the date of the work.
16. Contractor shall not be liable for any delay, loss, damage or detention caused by unavailability of machinery, equipment or materials, delay of carriers, strikes, including those by Contractor's employees, lockouts, civil or military authority, priority regulations, insurrection or riot, action of the elements, forces of nature, or by any cause beyond its control.
17. The Customer has the right to cancel this program at any time for any reason with a 30 day written notice of intent to cancel. If this action is taken, Bassett Mechanical may invoice at the preferred prevailing time and materials rates for any work that has been done which exceeds the amount(s) previously billed not to exceed the annual agreement price.
18. To the fullest extent permitted by law both customer and the contractor shall hold harmless the other party, its agent and employees from and against claims, damages, losses and expenses (including but not limited to attorney's fees) to the extent that such claim, damage, loss or expense is caused in whole or in part by an active or passive act or omission of the other party anyone directly or indirectly employed by that party, or anyone for whose acts that may be liable.
19. Customer shall make available to Contractor's personnel all pertinent Material Safety Data Sheets (MSDS) pursuant to OSHA'S Hazard Communication Standard Regulations.
20. Contractor expressly disclaims any and all responsibility and liability for the indoor air quality of the customer's facility, including without limitation injury or illness to occupants of the facility or third parties, arising out of or in connection with the Contractor's work under this agreement.
21. Contractor's obligation under this proposal and any subsequent contract does not include the identification, abatement or removal of asbestos or any other toxic or hazardous substances, hazardous wastes or hazardous materials. In the event such substances, wastes and materials are encountered, Contractor's sole obligation will be to notify the Owner of their existence. Contractor shall have the right thereafter to suspend its work until such substances, wastes or materials and the resultant hazards are removed. The time for completion of the work shall be extended to the extent caused by the suspension and the contract price equitably adjusted.
22. UNDER NO CIRCUMSTANCES, WHETHER ARISING IN CONTRACT, TORT (INCLUDING NEGLIGENCE), EQUITY OR OTHERWISE, WILL CONTRACTOR BE RESPONSIBLE FOR LOSS OF USE, LOSS OF PROFIT, INCREASED OPERATING OR MAINTENANCE EXPENSES, CLAIMS OF CUSTOMER'S TENANTS OR CLIENTS, OR ANY SPECIAL, INDIRECT OR CONSEQUENTIAL DAMAGES.

Inventory of Equipment

Full Coverage Unit	
Maintenance Only Unit	

Building 10			
Qty	Equipment	Location	Asset Note
1	10-EF-01	Building 10	A30
1	10-EF-02	Building 10	
1	10-HRU-01	Building 10	
1	10-MAU-01	Building 10	
1	10-MAU-02	Building 10	BX47
1	10-SF-01	Building 10	
1	10-SF-03	Building 10	
1	10-UH 01	Building 10	
1	10-UH-02	Building 10-Gen Room	
1	10-UH-03	Building 10-Screen Room	
1	10-UH-04	Building 10-Screen Room	
Building 20			
Qty	Equipment	Location	Asset Note
1	20-ACCU-01	Main Bldg. Roof	
1	20-AHU-01	Mechanical Closet - Admin Bldg.	
1	20-ACCU-02	Main Bldg Roof	
1	20-AHU-02	Mechanical Closet - Admin Bldg	
1	20-BLR-01	Boiler Room 20-118	
1	20-BLR-02	Boiler Room 20-118	
1	20-BLR-03	Boiler Room 20-118	
1	20-EF-01	Acid Feed Room	
1	20-EF-02	Building 20-SO2 Feed Room	
1	20-EF-03	Building 20-SO2 Storage	
1	20-EF-04	Building 20-Chlorhine Feed	
1	20-EF-05	Bldg 20-Chlorhine Storage	
1	20-EF-08	Building 20-Filter Pump Room	
1	20-EF-09	Building 20-Filter Pump Control	
1	20-EF-10	Building 20-Holding Tank Blower Room	
1	20-UH-01	Building 20-117	
1	20-UH-02	Building 20-117	
1	20-UH-03	Building 20-116	
1	20-UH-04	Building 20-115	
1	20-UH-05	Building 20-114	
1	20-UH-06	Building 20-113	



Inventory of Equipment

1	20-UH-07	Building 20-112	
1	20-UH-08	Building 20-111	
1	20-UH-09	Building 20-110	
1	20-UH-10	Building 20-MCC	
1	20-UH-11	Building 40-Sand Filter	
Building 30			
Qty	Equipment	Location	Asset Note
1	30-AHU-01	Building 30	(2) BX-71
1	30-AHU-02	Building 30	(2) BX-66
1	30-EF-01	Building 30	A30
1	30-EF-02	Building 30	
1	30-EF-03	Building 30	
1	30-EF-04	Building 30	
1	30-EF-05	Building 30	
1	30-EF-06	Building 30-Side	
1	30-EF-07	Building 30-Side	
1	30-GFB-01	Building 30 Boiler Room	
1	30-P 01	30-GFB-01	
1	30-P-02	30-GFB-01	
1	30-GFB-02	Building 30 Boiler Room	
1	30-P 003	30-GFB-01	
1	30-P 004	30-GFB-01	
1	30-UH-01	Building 30-MCC	
1	30-UH-02	Building 30-Shop	
1	30-UH-03	Building 30-Shop	
1	30-UH-04	Building 30-Shop	
1	30-UH-05	Building 30-Press	
1	30-UH-06	Building 30-Press	
1	30-UH-07	Building 30-Press	
1	30-UH-08	Building 30-Press	
1	30-UH-09	Building 30-Stairs	
Building 40			
Qty	Equipment	Location	Asset Note
1	40-EF-01	Building 40-Clarifier Building	
1	40-EF-02	Building 40-Clarifier Control Room	
1	40-EF-03	Building 40-Clarifier 2 Vent	
1	40-EF-04	Building 40-Clarifier 1 Vent	
1	40-EF-05	Building 40-Sludge Tank	
1	40-UH-01	Building 40-Clarifier 2 Vent	



Inventory of Equipment

1	40-UH-02	Building 40-MCC	
Building 80			
Qty	Equipment	Location	Asset Note
1	80-EF-01	Building 80	
Backflow Preventers			
Qty	Equipment	Location	Asset Note
1	BF-01	Meter Room	Expiration 6/17/2025
1	BF-02	Meter Room	Expiration 7/12/2025
1	BF-03	Boiler Room	Expiration 12/21/2024

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▪ METAL FABRICATING ▪ SERVICE



Equipment Tasking

Scheduled maintenance inspections are performed at various times throughout the year. Tasking Sheets provide an overview of the maintenance to be performed.

FAN EXHAUST/SUPPLY W/ BELT

- Check disconnect
- Tighten electrical connections
- Check all belts for proper wear and tension
- Inspect fan security to shaft
- Check damper operation, clean, and lubricate as needed if applicable
- Check pulleys for wear
- Check bearings for wear
- Lubricate bearings if applicable
- Check motor operation
- Verify proper operation

ENERGY RECOVERY UNIT

- Examine disconnect for proper operation
- Inspect electrical connections
- Record motor operating amps(3 HP and above) #1
- Inspect motor mounts
- Visually inspect for oil or refrigerant leaks if applicable
- Inspect coils
- Inspect/test the operation of all pressure and temperature controls
- Check for unusual noise, vibration, or excessive temperatures
- Inspect blower wheels, housings, and brackets for cracks or damage
- Inspect belts/pulleys and check alignment if applicable
- Lubricate bearings as needed
- Inspect wiring of electric heat if applicable
- Record operating amps of electric heat if applicable
- Inspect filter
- Clean condensate pan and drains if applicable
- Verify proper operation

MAKE UP AIR DIRECT FIRED W/O COOLING

- Inspect all terminals and connectors for tightness
- Inspect contactors
- Check all transformers for proper input/output voltage
- Record amp draw (3 hp and higher)
- Check for unusual fan noise, vibration, or excessive temperatures
- Inspect belts, pulleys, drive couplings, and bearings for wear if applicable
- Lubricate bearings as required
- Clean burners and burner orifices



Equipment Tasking

- Check flame condition
- Inspect and clean pilot assemblies, igniters, and sensors
- Inspect for gas leaks
- Verify proper operation of all safety controls
- Sequence test burners and all related controls
- Check for proper flame signal
- Check for proper gas pressures
- Visually inspect each gas train component
- Check that all valves, modulators, and regulators are functioning properly
- Verify proper operation of all dampers - lubricate as needed
- Inspect filters and/or intake screens - brush as needed
- Verify proper operation
- Record discharge air temp and ambient temp

UNIT HEATER HOT WATER

- Verify operation of thermostat
- Verify proper operation

CONDENSER - CONDENSING UNIT AIR

- Inspect all terminals and connectors
- Inspect contactors
- Check all transformers for proper input/output voltage
- Ensure that crankcase heaters are operating properly
- Visually inspect for oil/refrigerant leaks
- Record compressor suction & discharge pressure, superheat, sub cooling
- Record operating amps of compressor(s)
- Inspect/test the operation of all pressure/temperature controls
- Check the operation of the oil lubrication system if applicable
- Check the operation of hot gas bypass valves if applicable
- Check unloaders and other capacity controls if applicable
- Inspect motor mounting brackets and bolts
- Verify security of fan blade to shaft
- Look for excessive end play, bearing wear, proper balance and alignment
- Inspect wiring
- Record ambient temp
- Inspect condenser coil and brush as needed
- Verify proper operation



Equipment Tasking

FURNACE GAS

- Inspect all terminals and connectors
- Inspect contactors
- Check all transformers for proper input/output voltage
- Sequence test all components
- Check for unusual noise- vibration or excessive temperatures
- Record amp draw (3 hp and higher)
- Clean blower wheels and motor vents
- Clean entire cabinet as needed
- Inspect coil and look for signs of refrigerant leaks
- Lubricate bearings if applicable
- Inspect heat exchanger
- Inspect stacks, chimneys hoods, and flues for cracks holes and weak spots
- Clean pilot/ignition assembly and flame rod
- Inspect and clean burners
- Inspect/verify operation and clean draft fan
- Clean combustion chamber
- Clean trap on condensing furnace if applicable
- Verify proper operation

BOILER HOT WATER

- Inspect all terminals & connectors for tightness and inspect wiring
- Inspect contactors for worn contacts
- Check all transformers for proper input/output voltage
- Check all fuses for proper size, rating, and fit
- Sequence test all components and burners
- Inspect draft fan for proper operation and lubricate as needed - if applicable
- Clean burners and burner compartment as needed
- Inspect and clean pilot assemblies, ignitors, and sensors as needed
- Verify proper operation of all safety controls
- Record high/low gas pressure settings
- Check and set manifold pressure
- Visually check entire gas train
- Check and record flame signal
- Inspect all gauges
- Inspect for gas/water leaks
- Clean and check operation of low water cutoff
- Verify proper operation of the feed water system and clean strainer
- Inspect boiler venting connection
- Perform recommended manufacturer tasks



Equipment Tasking

AIR HANDLER W/ HEAT W/ COOL

- Examine disconnect for proper operation
- Inspect electrical connections
- Record motor operating amps (3 HP and above) #1
- Inspect motor mounts
- Visual inspect for oil or refrigerant leaks if applicable
- Inspect coils
- Inspect/test the operation of all pressure and temperature controls
- Check for unusual noise - vibration or excessive temperatures
- Inspect blower wheels housings and brackets for cracks or damage
- Inspect belts/pulleys and check alignment if applicable
- Lubricate bearings as needed
- Inspect wiring of electric heat if applicable
- Record operating amps of electric heat if applicable
- Inspect filter
- Clean condensate pan and drains if applicable
- Verify proper operation

PUMP

- Electrical disconnect - verify proper operation
- Inspect motor starter & disconnect if applicable
- Check & tighten electrical connections if applicable
- Verify proper overload protection if applicable
- Check packing & seals for leaks
- Inspect coupling for wear & integrity if applicable
- Check pressure gauges & record operating pressure
- Lubricate motor if applicable
- Lubricate bearing assembly if applicable
- Verify proper operations and flow
- Check drive coupling & coupling alignment (If applicable)

BACKFLOW PREVENTOR

- Test differential relief valve
- Check air gap
- Check strainer and clean as required
- Check for water leaks
- Verify proper operation
- File appropriate inspection report



Special Provisions

Special Provisions - CPMII:



- All parts, materials and service calls not specifically stated as covered under this service agreement shall be excluded and will be invoiced separately to customer upon receiving proper approval for the work to be performed.
- Excluded from this agreement shall be all system ductwork, system piping, variable frequency drives, water treatment and anything not specifically stated as covered within this agreement.

Special Provisions – GPM+:



- Excluded from this agreement shall be all system ductwork, system piping, variable frequency drives, water treatment, obsolescence, and anything not specifically stated as covered within this agreement.
- All water treatment services will be the responsibility of the customer. Any repairs or replacements due to insufficient water treatment (i.e. boilers) will be the responsibility of the customer.
- This is a Guaranteed Professional Maintenance Plus agreement which means that coverage is extended to the coils and heat exchangers.
- Bassett will provide a full equipment condition report after the first pm which could include failed components that will need to be repaired before equipment gets covered under the GPM+ program. Bassett will cover the repairs needed up to 10% of the agreement price. This is only applicable to the initial agreement and does not apply to renewals.

Special Provision - Multi-Year Agreement:



Year 1: January 1, 2025 through December 31, 2025:	\$9,036.00
Year 1 T&M Repair Budget:	\$30,000.00
Year 1 Total:	\$39,036.00
Year 2: January 2026 through December 31, 2026:	\$37,404.00
Year 3: January 2027 through December 31, 2027:	\$37,404.00



Customer Portal

Leverage historical equipment insights to drive future planning.

View all your facilities from one screen.

Directly access maintenance and service call work order details.

BACK TO SITES						
Search: <input type="text"/>						
- Serviceable Items						
ServiceItem	Description	Manufacturer	Model	Type	Service History	
AHU 1	AHU 1	KING	2024-30	W/HEAT W/COOL		
AHU 2	AHU LARGE CAP. HORIZONTAL FAN COIL W/ HEATING & COOLING COIL #2	MCQUAY	SHB201BRP	W/HEAT W/COOL		
BLR 1	BOILER 1	IBC	SL40-399	HOT WATER		
BLR 2	BOILER 2	IBC	SL40-399	HOT WATER		
BLR 3	BOILER 3	IBC	SL40-399	HOT WATER		
CAC 1	COMPUTER ROOM A/C UNIT #1	LIEBERT	CU 66A	AIR COOLED		
CHLR 1	AIR COOLED WATER CHILLER 1	CARRIER	30RBB08064-59-3	CARRIER SCROL A		
CHLR 2	CHILLER 2	IPG	LC170.01-A.6.5/6	RECIP AIR COOL		
COND 1	AIR COOLED CONDENSING UNIT #1	LIEBERT	CSC-086L	COND AIR		
DDC 454	CONTROLS 454	VARIOUS		DDC		
EF 1	EXHAUST FAN #1	GREENHECK	GB-100-3	W/BELT		
EF 1 - 20	EXHAUST FAN 1 - 20			W/BELT		

Work Orders - 1.0.7

NEW WORK ORDER REQUEST

CHANGE STATUS FILTER TO... ▾

BACK

Show 5 ▾ entries

Search:

Work Order	Description	Service Site	Status	Purchase Order	Created	Contact Name	Contact Phone	Tasks
3903	*Cancelled* Service Call		Closed	.	06/22/2023			
6089	Ammonia leak. Valve stem is leaking		Closed	263668	11/07/2023			View WO Tasks
3248	APRIL REF WAUS CPM -		Closed	253569	06/03/2023			View WO Tasks
4521	AUGUST CPM -		Closed	253569	08/01/2023			View WO Tasks
4522	AUGUST CPM		Closed	253569	08/01/2023			View WO Tasks

Showing 1 to 5 of 52 entries

Previous

1

2

3

4

5

...

11

Next



Customer Portal

Invoices - 1.0.4

[SHOW ALL RECORDS](#)[VIEW UNPAID INVOICE SUMMARY](#)[BACK](#)Show entriesSearch:

Showing Top 20 Records

Invoice #	Type	Status	Invoice Date	Work Order	Purchase Order	Total Amount	Total Paid
257544	AG	Invoiced	03/01/2024	0		6935.00	0.00
257546	AG	Invoiced	03/01/2024	0		2850.00	0.00
257606	AG	Invoiced	03/01/2024	0		3173.00	0.00
257412	AG	Invoiced	02/28/2024	0		6935.00	0.00
256300	AG	Invoiced	02/01/2024	0		2850.00	2850.00
256306	AG	Invoiced	02/01/2024	0		3173.00	3173.00
255513	WO	Invoiced	01/18/2024	6089	263668	149.00	149.00
254620	AG	Invoiced	01/01/2024	0		6733.00	6733.00
254622	AG	Invoiced	01/01/2024	0		2850.00	2850.00
254623	AG	Invoiced	01/01/2024	0		3173.00	3173.00

Showing 1 to 10 of 20 entries

[Previous](#) [1](#) [2](#) [Next](#)

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monitor
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you with control
and
convenience.

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go – phone,
tablet, or
computer.



Service Agreement Invoice Bassett Mechanical

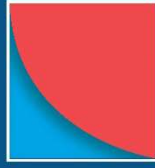
Mail Remittance to

Bassett Mechanical
PO Box 7000
Kaukauna, WI 54130-7000

To: **Location:**
Address: **Invoice:** 257546**Invoice Date:** 03/01/2024**Due Date:** 03/31/2024**Your PO Number:** **Contract Number:** C1470**Contract Description:** CUSTOMIZED PROFESSIONAL MAINTENANCE**Billing for agreement effective 09/05/2023 to 08/31/2024**

Period Billing Amount:	\$2,850.00
Sales Tax:	\$0.00
Total Due:	\$2,850.00





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Design. Fabricate. Install. Service.

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Menomonee Falls, WI 53051



MADISON, WI

4017 Owl Creek Dr.
Madison, WI 53718



WAUSAU, WI

4403 Stewart Ave., Suite B
Wausau, WI 54401



ROCHESTER, MN

570 High Point Dr. NE
Byron, MN 55920

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**BASSETT
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Partnering Together with Bassett Mechanical

HVAC Solutions

Prepared For:
Columbus Utilities
537 River Road
Columbus, Wisconsin 53925

Date: 8/8/2024
Proposal Number: P03191

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MAINTENANCE AGREEMENT FOR BUILDING ENVIRONMENTAL SYSTEMS

Company

Bassett Mechanical
4017 Owl Creek Drive
Madison, WI 53718

Proposal Date: 5/21/2024

Proposal Number: P03191

Agreement Number:

Ph: 920-462-1894

Fax: 920-759-2525

Bill To Identity	Agreement Location
Columbus Utilities 950 Maple Avenue Columbus, Wisconsin 53925 Attn: Jacob Holbert Jeremy Roll	Columbus Wastewater Treatment Plant 537 River Road Columbus, Wisconsin 53925 Attn: Jacob Holbert Jeremy Roll

Bassett Mechanical will provide the services described in the maintenance program indicated below.

MAINTENANCE PROGRAM: CPMII Maintenance Only **SCHEDULES:** *Equipment Schedule *Air Filter Service

Agreement coverage will commence on 1/1/2025.

The Agreement price is \$9,036.00 per year, payable in advanced installments of \$753.00 per Month beginning on the effective date of 1/1/2025. This is a combination Maintenance Agreement with Time and Material accounted for. The pricing structure can be found on **Page 13**. Year One Maintenance Only pricing **\$9,036.00** payable in advanced installments of \$9,036.00 per year. Accompanying this maintenance program will be a \$30,000 Time and Materials allowance for repairs and replacements per for a total approved budget not to exceed **\$39,036.00** in year one.

This proposal is the property of Contractor and is provided for Customer's use only. Contractor guarantees the price stated in this Agreement for thirty (30) days from the proposal date above. This proposal will become a binding Agreement only after acceptance by the Customer and approval by an officer of the Contractor as evidenced by their signatures below. This Agreement sets forth all of the terms and conditions binding upon the parties hereto; and no person has authority to make any claim, representation, promise, or condition on behalf of Contractor which is not expressed herein.

Company

Signature Sales Consultant

Accepted for Company by: Signature

Name & Title

Date / Phone / Fax

Customer

Signature (Authorized Representative)

Name (Print)

Title

Date



Creating Customers for Life®

Planned Maintenance (S/A CPMII) Program

This agreement is designed to provide the Customer with an ongoing maintenance agreement. This agreement will be initiated, scheduled, administered, monitored, and updated by the Service Provider. The service activities will be directed and scheduled, on a regular basis, by our comprehensive equipment maintenance scheduling system based on manufacturers' recommendations, equipment location, application, type, run time, and the Service Provider's own experience.

COMPLETE PROFESSIONAL MAINTENANCE: Comprehensive maintenance program with computerized tasking to ensure the highest standards are followed, reducing breakdowns, providing equipment reliability, and helping to extend the life of your equipment.

TEST AND INSPECT: On-site labor, travel labor, and travel and living expenses are required to visually INSPECT and TEST equipment to determine its operating condition and efficiency. Typical activities could include:

*TESTING for excessive vibration; motor winding resistance; refrigerant charge; fan RPM; refrigerant oil (acid); flue gas analysis; safety controls, combustion and draft; crankcase heaters, control system(s), etc.

*INSPECTING for worn, failed, or doubtful parts; mountings, drive couplings; oil level; rotation; soot; flame composition and shape; pilot and igniter; steam, water, oil, and/or refrigerant leaks, etc.

PREVENTIVE MAINTENANCE: On-site labor, travel labor, and travel and living expenses are required to clean, align, calibrate, tighten, adjust, and lubricate equipment. These activities are intended to extend the equipment's life and assure proper operating conditions and efficiency. Typical activities could include:

*CLEANING coil surfaces; electrical contacts; burner orifices; passages and nozzles; pilot and igniter; cooling tower baffles, basin, sump and float; chiller, condenser and boiler tubes, etc.

*ALIGNING belt drives; drive couplings; coil fins, etc.

*CALIBRATING safety controls; temperature and pressure controls, etc.

*TIGHTENING electrical connections; mounting bolts; refrigerant piping fittings; damper sections, etc.

*ADJUSTING belt tension; refrigerant charge; super heat; fan RPM; burner fuel/air ratios; gas pressure; set point of controls and limits; compressor cylinder unloaders; damper close-off; sump floats, etc.

*LUBRICATING motors; fan and damper bearings; valve stems; damper linkages; fan vane linkages, etc.

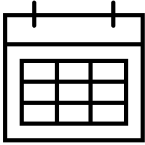
PRIMARY TECHNICIAN: An assigned primary and secondary technician for your facility.

ASSIGNED PROJECT MANAGER: An Assigned HVAC Specialist to assist you with future planning, budgeting, system upgrades, and current project needs.

DOCUMENTATION: On-going communication regarding the history of your equipment as well as the current performance of the system through service reports and Bassett's web-based reporting platform.

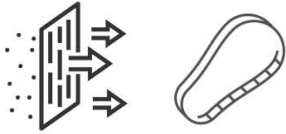
Scope of Work

Maintenance Intervals:



- Bassett will be onsite on a Semi-Annual basis.

Filter and Belt Replacement:



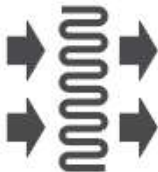
- Filters will be provided and replaced by Columbus Utilities
- Belts will be provided and replaced by Bassett Mechanical on an Annual basis.

Lifts:



- Lift rentals are not included in the scheduled preventative maintenance portion of this agreement.
- The sludge barn will require a lift once per year for maintenance on exhaust fans. It has been discussed that the city may have a boom lift available for Bassett Mechanical's use at that time.

Coil Cleaning:



- Condenser coil cleaning will be done by Bassett Mechanical on an Annual basis.



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CUSTOMIZED PROFESSIONAL MAINTENANCE PROGRAM II TERMS AND CONDITIONS

1. Customer shall permit Contractor free and timely access to areas and equipment, and allow Contractor to start and stop the equipment as necessary to perform required services. All planned work under this Agreement will be performed during the Contractor's normal working hours.
2. In case of any failure to perform its obligations under this Agreement, Contractor's liability is limited to repair or replacement at its option and such repair or replacement shall be Customer's sole remedy. This warranty is conditioned upon proper operation and maintenance by Customer and shall not apply if the failure is caused or contributed to by accident, alteration, abuse or misuse, and shall not extend beyond the term of this Agreement.
3. This annual agreement shall continue in effect from year to year unless either party gives written notice to the other of intention not to renew thirty (30) days prior to any anniversary date.
4. The annual Agreement price is subject to adjustment on each commencement anniversary to reflect increases in labor, material and other costs.
5. Customer shall be responsible for all taxes applicable to the services and/or materials hereunder.
6. Customer will promptly pay invoices within thirty (30) days of receipt. Should a payment become thirty one (31) days or more delinquent, Contractor may stop all work under this Agreement without notice and/or cancel this Agreement, and the entire Agreement amount shall become due and payable immediately upon demand.
7. This Agreement does not include repairs to the system(s), the provisions or installation of components or parts, or service calls requested by the Customer. These services will be charged for at Contractor's rates then in effect.
8. Any alteration to, or deviation from, this Agreement involving extra work, cost of materials or labor will become an extra charge (fixed price amount to be negotiated or on a time-and-material basis at Contractor's rates then in effect) over the sum stated in this Agreement.
9. Contractor will not be required to move, replace or alter any part of the building structure in the performance of this Agreement.
10. Customer shall permit only Contractor's personnel or agent to perform the work included in the scope of this Agreement. Should anyone other than Contractor's personnel perform such work, Contractor may, at its option, cancel this Agreement or eliminate the involved item of equipment from inclusion in this Agreement.
11. In the event Contractor must commence legal action in order to recover any amount payable under this Agreement, Customer shall pay Contractor all court costs and attorneys' fees incurred by Contractor.
12. Any legal action against the Contractor relating to this Agreement, or the breach thereof, shall be commenced within one (1) year from the date of the work.
13. Contractor shall not be liable for any delay, loss, damage or detention caused by unavailability of machinery, equipment or materials, delay of carriers, strikes, including those by Contractor's employees, lockouts, civil or military authority, priority regulations, insurrection or riot, action of the elements, forces of nature, or by any cause beyond its control.
14. The Customer has the right to cancel this program at any time for any reason with a 30 day written notice of intent to cancel. If this action is taken, Bassett Mechanical may invoice at the preferred prevailing time and materials rates for any work that has been done which exceeds the amount(s) previously billed not to exceed the annual agreement price.
15. To the fullest extent permitted by law both customer and the contractor shall hold harmless the other party, its agent and employees from and against claims, damages, losses and expenses (including but not limited to attorney's fees) to the extent that such claim, damage, loss or expense is caused in whole or in part by an active or passive act or omission of the other party anyone directly or indirectly employed by that party, or anyone for whose acts that may be liable.
16. Customer shall make available to Contractor's personnel all pertinent Material Safety Data Sheets (MSDS) pursuant to OSHA'S Hazard Communication Standard Regulations.
17. Contractor expressly disclaims any and all responsibility and liability for the indoor air quality of the customer's facility, including without limitation injury or illness to occupants of the facility or third parties, arising out of or in connection with the Contractor's work under this agreement.
18. Contractor's obligation under this proposal and any subsequent contract does not include the identification, abatement or removal of asbestos or any other toxic or hazardous substances, hazardous wastes or hazardous materials. In the event such substances, wastes and materials are encountered, Contractor's sole obligation will be to notify the Owner of their existence. Contractor shall have the right thereafter to suspend its work until such substances, wastes or materials and the resultant hazards are removed. The time for completion of the work shall be extended to the extent caused by the suspension and the contract price equitably adjusted.
19. UNDER NO CIRCUMSTANCES, WHETHER ARISING IN CONTRACT, TORT (INCLUDING NEGLIGENCE), EQUITY OR OTHERWISE, WILL CONTRACTOR BE RESPONSIBLE FOR LOSS OF USE, LOSS OF PROFIT, INCREASED OPERATING OR MAINTENANCE EXPENSES, CLAIMS OF CUSTOMER'S TENANTS OR CLIENTS, OR ANY SPECIAL, INDIRECT OR CONSEQUENTIAL DAMAGES.

KAUKAUNA, WI (HQ)
1215 Hyland Ave.
Kaukauna, WI 54130

MILWAUKEE, WI
W136 N4829 Campbell Dr.
Menomonee Falls, WI 53051

MADISON, WI
4017 Owl Creek Dr.
Madison, WI 53718

WAUSAU, WI
4403 Stewart Ave., Suite B
Wausau, WI 54401

ROCHESTER, MN
570 High Point Dr. NE
Byron, MN 55920



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Inventory of Equipment

Building 10			
Qty	Equipment	Location	Asset Note
1	10-EF-01	Building 10	A30
1	10-EF-02	Building 10	
1	10-HRU-01	Building 10	
1	10-MAU-01	Building 10	
1	10-MAU-02	Building 10	BX47
1	10-SF-01	Building 10	
1	10-SF-03	Building 10	
1	10-UH 01	Building 10	
1	10-UH-02	Building 10-Gen Room	
1	10-UH-03	Building 10-Screen Room	
1	10-UH-04	Building 10-Screen Room	
Building 20			
Qty	Equipment	Location	Asset Note
1	20-ACCU-01	Main Bldg. Roof	
1	20-AHU-01	Mechanical Closet - Admin Bldg.	
1	20-ACCU-02	Main Bldg Roof	
1	20-AHU-02	Mechanical Closet - Admin Bldg	
1	20-BLR-01	Boiler Room 20-118	
1	20-BLR-02	Boiler Room 20-118	
1	20-BLR-03	Boiler Room 20-118	
1	20-EF-01	Acid Feed Room	
1	20-EF-02	Building 20-SO2 Feed Room	
1	20-EF-03	Building 20-SO2 Storage	
1	20-EF-04	Building 20-Chlorhine Feed	
1	20-EF-05	Bldg 20-Chlorhine Storage	
1	20-EF-08	Building 20-Filter Pump Room	
1	20-EF-09	Building 20-Filter Pump Control	
1	20-EF-10	Building 20-Holding Tank Blower Room	
1	20-UH-01	Building 20-117	
1	20-UH-02	Building 20-117	
1	20-UH-03	Building 20-116	



Inventory of Equipment

1	20-UH-04	Building 20-115	
1	20-UH-05	Building 20-114	
1	20-UH-06	Building 20-113	
1	20-UH-07	Building 20-112	
1	20-UH-08	Building 20-111	
1	20-UH-09	Building 20-110	
1	20-UH-10	Building 20-MCC	
1	20-UH-11	Building 40-Sand Filter	
Building 30			
Qty	Equipment	Location	Asset Note
1	30-AHU-01	Building 30	(2) BX-71
1	30-AHU-02	Building 30	(2) BX-66
1	30-EF-01	Building 30	A30
1	30-EF-02	Building 30	
1	30-EF-03	Building 30	
1	30-EF-04	Building 30	
1	30-EF-05	Building 30	
1	30-EF-06	Building 30-Side	
1	30-EF-07	Building 30-Side	
1	30-GFB-01	Building 30 Boiler Room	
1	30-P 01	30-GFB-01	
1	30-P-02	30-GFB-01	
1	30-GFB-02	Building 30 Boiler Room	
1	30-P 003	30-GFB-01	
1	30-P 004	30-GFB-01	
1	30-UH-01	Building 30-MCC	
1	30-UH-02	Building 30-Shop	
1	30-UH-03	Building 30-Shop	
1	30-UH-04	Building 30-Shop	
1	30-UH-05	Building 30-Press	
1	30-UH-06	Building 30-Press	
1	30-UH-07	Building 30-Press	
1	30-UH-08	Building 30-Press	
1	30-UH-09	Building 30-Stairs	



Inventory of Equipment

Building 40					
Qty	Equipment	Location	Asset Note		
1	40-EF-01	Building 40-Clarifier Building			
1	40-EF-02	Building 40-Clarifier Control Room			
1	40-EF-03	Building 40-Clarifier 2 Vent			
1	40-EF-04	Building 40-Clarifier 1 Vent			
1	40-EF-05	Building 40-Sludge Tank			
1	40-UH-01	Building 40-Clarifier 2 Vent			
1	40-UH-02	Building 40-MCC			

Building 80					
Qty	Equipment	Location	Asset Note		
1	80-EF-01	Building 80			
Backflow Preventers					
Qty	Equipment	Location	Asset Note		
1	BF-01	Meter Room	Expiration 6/17/2025		
1	BF-02	Meter Room	Expiration 7/12/2025		
1	BF-03	Boiler Room	Expiration 12/21/2024		

■ CONTRACTING ■ ENGINEERING

■ METAL FABRICATING ■ SERVICE



Equipment Tasking

Scheduled maintenance inspections are performed at various times throughout the year. Tasking Sheets provide an overview of the maintenance to be performed.

FAN EXHAUST/SUPPLY W/ BELT

- Check disconnect
- Tighten electrical connections
- Check all belts for proper wear and tension
- Inspect fan security to shaft
- Check damper operation, clean, and lubricate as needed if applicable
- Check pulleys for wear
- Check bearings for wear
- Lubricate bearings if applicable
- Check motor operation
- Verify proper operation

ENERGY RECOVERY UNIT

- Examine disconnect for proper operation
- Inspect electrical connections
- Record motor operating amps(3 HP and above) #1
- Inspect motor mounts
- Visually inspect for oil or refrigerant leaks if applicable
- Inspect coils
- Inspect/test the operation of all pressure and temperature controls
- Check for unusual noise, vibration, or excessive temperatures
- Inspect blower wheels, housings, and brackets for cracks or damage
- Inspect belts/pulleys and check alignment if applicable
- Lubricate bearings as needed
- Inspect wiring of electric heat if applicable
- Record operating amps of electric heat if applicable
- Inspect filter
- Clean condensate pan and drains if applicable
- Verify proper operation

MAKE UP AIR DIRECT FIRED W/O COOLING

- Inspect all terminals and connectors for tightness
- Inspect contactors
- Check all transformers for proper input/output voltage
- Record amp draw (3 hp and higher)
- Check for unusual fan noise, vibration, or excessive temperatures
- Inspect belts, pulleys, drive couplings, and bearings for wear if applicable
- Lubricate bearings as required
- Clean burners and burner orifices
- Check flame condition



Equipment Tasking

- Inspect and clean pilot assemblies, igniters, and sensors
- Inspect for gas leaks
- Verify proper operation of all safety controls
- Sequence test burners and all related controls
- Check for proper flame signal
- Check for proper gas pressures
- Visually inspect each gas train component
- Check that all valves, modulators, and regulators are functioning properly
- Verify proper operation of all dampers - lubricate as needed
- Inspect filters and/or intake screens - brush as needed
- Verify proper operation
- Record discharge air temp and ambient temp

UNIT HEATER HOT WATER

- Verify operation of thermostat
- Verify proper operation

CONDENSER - CONDENSING UNIT AIR

- Inspect all terminals and connectors
- Inspect contactors
- Check all transformers for proper input/output voltage
- Ensure that crankcase heaters are operating properly
- Visually inspect for oil/refrigerant leaks
- Record compressor suction & discharge pressure, superheat, sub cooling
- Record operating amps of compressor(s)
- Inspect/test the operation of all pressure/temperature controls
- Check the operation of the oil lubrication system if applicable
- Check the operation of hot gas bypass valves if applicable
- Check unloaders and other capacity controls if applicable
- Inspect motor mounting brackets and bolts
- Verify security of fan blade to shaft
- Look for excessive end play, bearing wear, proper balance and alignment
- Inspect wiring
- Record ambient temp
- Inspect condenser coil and brush as needed
- Verify proper operation



Equipment Tasking

FURNACE GAS

- Inspect all terminals and connectors
- Inspect contactors
- Check all transformers for proper input/output voltage
- Sequence test all components
- Check for unusual noise- vibration or excessive temperatures
- Record amp draw (3 hp and higher)
- Clean blower wheels and motor vents
- Clean entire cabinet as needed
- Inspect coil and look for signs of refrigerant leaks
- Lubricate bearings if applicable
- Inspect heat exchanger
- Inspect stacks, chimneys hoods, and flues for cracks holes and weak spots
- Clean pilot/ignition assembly and flame rod
- Inspect and clean burners
- Inspect/verify operation and clean draft fan
- Clean combustion chamber
- Clean trap on condensing furnace if applicable
- Verify proper operation

BOILER HOT WATER

- Inspect all terminals & connectors for tightness and inspect wiring
- Inspect contactors for worn contacts
- Check all transformers for proper input/output voltage
- Check all fuses for proper size, rating, and fit
- Sequence test all components and burners
- Inspect draft fan for proper operation and lubricate as needed - if applicable
- Clean burners and burner compartment as needed
- Inspect and clean pilot assemblies, ignitors, and sensors as needed
- Verify proper operation of all safety controls
- Record high/low gas pressure settings
- Check and set manifold pressure
- Visually check entire gas train
- Check and record flame signal
- Inspect all gauges
- Inspect for gas/water leaks
- Clean and check operation of low water cutoff
- Verify proper operation of the feed water system and clean strainer
- Inspect boiler venting connection
- Perform recommended manufacturer tasks



Equipment Tasking

AIR HANDLER W/ HEAT W/ COOL

- Examine disconnect for proper operation
- Inspect electrical connections
- Record motor operating amps (3 HP and above) #1
- Inspect motor mounts
- Visual inspect for oil or refrigerant leaks if applicable
- Inspect coils
- Inspect/test the operation of all pressure and temperature controls
- Check for unusual noise - vibration or excessive temperatures
- Inspect blower wheels housings and brackets for cracks or damage
- Inspect belts/pulleys and check alignment if applicable
- Lubricate bearings as needed
- Inspect wiring of electric heat if applicable
- Record operating amps of electric heat if applicable
- Inspect filter
- Clean condensate pan and drains if applicable
- Verify proper operation

PUMP

- Electrical disconnect - verify proper operation
- Inspect motor starter & disconnect if applicable
- Check & tighten electrical connections if applicable
- Verify proper overload protection if applicable
- Check packing & seals for leaks
- Inspect coupling for wear & integrity if applicable
- Check pressure gauges & record operating pressure
- Lubricate motor if applicable
- Lubricate bearing assembly if applicable
- Verify proper operations and flow
- Check drive coupling & coupling alignment (If applicable)

BACKFLOW PREVENTOR

- Test differential relief valve
- Check air gap
- Check strainer and clean as required
- Check for water leaks
- Verify proper operation
- File appropriate inspection report



Special Provisions

Special Provisions - CPMII:



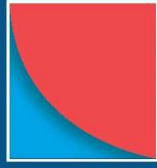
- All parts, materials and service calls not specifically stated as covered under this service agreement shall be excluded and will be invoiced separately to customer upon receiving proper approval for the work to be performed.
- Excluded from this agreement shall be all system ductwork, system piping, variable frequency drives, water treatment and anything not specifically stated as covered within this agreement.

Special Provision - Multi-Year Agreement:



Year 1: January 1, 2025 through December 31, 2025:	\$9,036.00
Year 1 T&M Repair Budget:	\$30,000.00
Year 1 Total:	\$39,036.00
Year 2: January 2026 through December 31, 2026:	\$9,312.00
Year 2 T&M Repair Budget:	\$30,000.00
Year 2 Total:	\$39,312.00
Year 3: January 2027 through December 31, 2027:	\$9,588.00
Year 3 T&M Repair Budget:	\$25,000.00
Year 3 Total:	\$34,988.00





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