

Silvyn, Jeff <[jsilvyn@pima.edu](mailto:jsilvyn@pima.edu)>

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**Fwd: Audit Request**

1 message

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**Tracy Nuckolls** <[tracy.nuckolls@gmail.com](mailto:tracy.nuckolls@gmail.com)>  
To: Jeff Silvyn <[jsilvyn@pima.edu](mailto:jsilvyn@pima.edu)>

Thu, Feb 18, 2021 at 10:16 AM

Begin forwarded message:

**From:** "Garcia, Maria" <[mgarcia12@pima.edu](mailto:mgarcia12@pima.edu)>  
**Subject:** Re: Audit Request  
**Date:** February 16, 2021 at 7:20:09 AM MST  
**To:** [tracy.nuckolls@gmail.com](mailto:tracy.nuckolls@gmail.com)

Tracy,  
This is the Auditor's response.  
Maria

On Thu, Feb 11, 2021 at 7:00 AM Gretchen Augustine <[gaugustine@azauditor.gov](mailto:gaugustine@azauditor.gov)> wrote:

Dear Mr. Gonzales and Ms. Garcia,

Thank you for reaching out to us regarding your concerns with procurement issues, as well as potential Conflict of Interest Violations related to the college's Integrated Energy Management Program Proposal and subsequent awarding of a contract. Your request for an audit cannot be fulfilled but must come from the Joint Legislative Audit Committee. We have reviewed the documents you provided and have concluded on the following. Specifically, the college district does not follow the State Procurement Statutes, but instead has its own procurement rules and therefore this Office has no authority to conduct an internal review of potential rule violations. Further, the emails you provided do not establish any obvious violations of the State Conflict of Interest Statutes. It appears that the concerns brought forth are internal and the college district should conduct an internal review to determine if the district's policies were violated. As a result, we will not be conducting a further review of these issues at this time. Please let me know if I can be of further assistance.

Sincerely,

**Gretchen Augustine, CFE**

Manager, Division of Financial Investigations

Arizona Auditor General

2910 N. 44<sup>th</sup> Street, Suite #410

Phoenix, Arizona 85018

Office: 602.553.0333

Direct: 602.553.9804



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**From:** Garcia, Maria <[mgarcia12@pima.edu](mailto:mgarcia12@pima.edu)>  
**Sent:** Wednesday, January 13, 2021 1:50 PM  
**To:** Lindsey Perry <[lperry@azauditor.gov](mailto:lperry@azauditor.gov)>  
**Subject:** Audit Request

January 14, 2021

Lindsey A. Perry, State Auditor  
State of Arizona office of the Auditor General  
2910 North 44th Street Suite 410  
Phoenix, Arizona 85018

Re: Request for audit of the Comprehensive, Integrated Energy Management Program Proposal No. P20/10015 10/11/2019).

Auditor General Perry,

We currently serve as elected members of the Pima Community College District Board of Governors (College). We were both elected in 2018. As elected public officials, our fiduciary responsibilities require us to request that your office conduct an audit of the award of the Pima Community College's Energy Management Contract. Recently, a constituent provided us with emails obtained through a request for public records. These emails indicate that Mr. James Knutson of Trane Inc., attempted to influence the RFP process and the selection of members of the review committee for the above referenced contract. The attempts to influence the outcome of this process included communication with Chancellor Lee Lambert.

On October 11, 2019, the College published a Request for Proposal entitled: Comprehensive, Integrated Energy Management Program, (Proposal No. P20/10015, 10/11/2019). We have obtained emails between Mr. Knutson and College employees dated from February 16, 2019 to August 17, 2019. During this period, Mr. Knutson and college employees exchanged 191 emails. All of the emails were sent prior to the October 11, 2019, release of Request for Proposal referenced above. The Pima Community College District Board of Governors approved executing an agreement with Trane, Inc. on June 3, 2020. The two signatories on this audit request were not aware of this information. The contract was executed on August 18, 2020. We have included a record of the emails between Mr. Knutson and the following College employees.

| Employee  | 2019 | 2020 | Total |
|---|------|------|-------|
| David Bea, Executive Vice Chancellor for Finance and Admin. | 28   | 93   | 121   |
| Tom Davis, Chief of Staff                                   | 4    | 7    | 11    |
| David Dore  | 16   | 32   | 48    |
| Lee Lambert, Chancellor                                     | 22   | 45   | 67    |
| Ian Roark   | 7    | 2    | 9     |
| Jeffrey Silvyn, General Counsel                             | 0    | 25   | 25    |
| William Ward, Vice Chancellor for Facilities                | 31   | 30   | 61    |
| Gregory Wilson, Dean, Applied Technology                    | 83   | 93   | 176   |
| Total   | 191  | 327  | 518   |

It is clear from the emails provided by the College that Mr. Knutson sought to develop a relationship with the College personnel for the purposes of influencing its decision on its energy

management systems contract. It is likely that the nexus for the connection between Mr. Lambert and Mr. Knutson is through NC3. The NC3 website (accessed October 26, 2019) indicates that Trane is an “industry partner” of NC3 (<https://www.nc3.net/industry-partners/#>). The website also contains a NC3 Board of Directors page that lists Mr. Lambert as a member of the Board (<https://www.nc3.net/board-of-directors/>). The extent of Trane’s involvement with NC3 can be gauged by the fact that Mr. Michael McAlice is listed as the Program Manger for Trane. The facts preceding are not a criticism of NC3 or its programs; however, it does clearly indicate that a relationship between Mr. Lambert and Trane appears to have occurred through NC3—well before the RFP process.

We are troubled by the content of these emails as they raise questions concerning the possibility that Arizona Procurement Policy was violated in the preparation and awarding of the contract to Trane. The relationship between Mr. Knutson and College employees is troubling in light of the fact that Trane was awarded the energy management contract. It is critical that the College follow procurement policies set by State of Arizona and its own procurement policies. This is essential to the fair, proper and legal awarding of contracts to vendors. These are the facts in the public record.

1. Chancellor Lambert is a member of the Board of Directors of NC3.
2. Mr. Patrick Archambault, Trane, Director of Strategic Programs, Commercial HVAC, is a member of the Board of Directors of NC3.
3. Trane’s Response to Request for Proposal states that, “Trane is the exclusive Energy Sponsor of NC3.”
4. Mr. James Knutson, Director, Integrated Solutions for Trane US Inc. developed a personal and email relationship with employees of the College that began on or about February 16, 2019.
5. Between February 16, 2019, and August 17, 2019, Mr. Knutson and College employees exchanged 191 emails.
6. On February 19, 2019, Mr. Knutson emailed Trane’s request to Chancellor Lambert to conduct, “[a] Preliminary Assessment for PCC at the Downtown Campus and West Campus, and all I need in return is an email from you agreeing to the terms in this email.”
7. On February 19, 2019, Chancellor Lambert emailed Mr. Knutson approving this request.
8. On May 20, 2019, Mr. Knutson emailed Greg Wilson “If you want to do an RFP, the selection committee must be your entire exec team and must not be done through Bill’s [William Ward, Vice Chancellor, Facilities] department for obvious reasons.
9. On June 6, 2019, Mr. Knutson emailed Mr. Wilson listing the “...tactics” that he alleged Mr. William Ward, Vice Chancellor for Facilities” would use to stop Trane’s Preliminary Assessment.

In the case of the Trane RFP and award process, we are concerned that it may have involved violations of long established policies, procedures and statutes that govern the fair awarding of public funds. We have voiced our concerns through appropriate internal channels including the Chancellor and Board Chair Demion Clinco. The College conducted an investigation on potential conflict of interest, however, it did not address the issues raised in this request.

In summary, we believe that the awardee, Trane Inc., may have been involved not only in the initial preparation of the RFP but also in influencing the selection of the review committee members. E-mails obtained through the Freedom of Information request process, indicate that Mr. James Knudson attempted to influence the RFP and award process. The emails to the Review Committee chair Mr. Greg Wilson clearly document Mr. Knutson's efforts to influence the membership of the selection committee. We note that among the emails received, there is one in which Mr. Knutson offered to repair the Trane air conditioning unit at Chancellor Lambert's private residence. All of this communication occurred prior to, and perhaps during, the RFP process. Arizona statute and regulations require open, fair, and transparent procurement processes. Therefore, violations of the type documented in the emails attached to this correspondence are of a very serious nature.

We have attached documents for your review. We would appreciate your immediate attention to this serious matter.

Sincerely,

Maria Garcia, PCC Board Member, District 3

Luis L. Gonzales, Board Member, District 5

**From:** ["Knutson, James"](mailto:Jim.Knutson@trane.com) <[Jim.Knutson@trane.com](mailto:Jim.Knutson@trane.com)>  
**To:** [gwilson@pima.edu](mailto:gwilson@pima.edu)  
**CC:**  
**Date:** 3/14/2019 10:21:56 AM  
**Subject:** Jim's Email

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Greg,

I sent a couple emails from my personal email [Jim.knutson@in-consensus.com](mailto:Jim.knutson@in-consensus.com)  
Just a head's up in case they got filtered.  
Jim

**Jim Knutson**  
*Director, Integrated Solutions*  
Trane Ingersoll Rand  
445 Bryant St., Unit 5  
Denver, CO 80204  
**Direct/Mobile/Text: (303) 349-4281**  
**Email: [Jim.Knutson@Trane.com](mailto:Jim.Knutson@Trane.com)**



**From:** ["Knutson, James" <Jim.Knutson@trane.com>](mailto:Jim.Knutson@trane.com)

**To:** [gwilson@pima.edu](mailto:gwilson@pima.edu)

**CC:**

**Date:** 4/10/2019 6:09:47 AM

**Subject:** FW: Arizona CS Projects Call

**Attachments:** [Controls Spec.pdf](#)

[Pima JS Symposium Ideas - V1.pdf](#)

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Greg, ( I apologize in advance for the long email)

I hope you hang onto that Virginia National Championship feeling for a long long time! What fun watching your team... I think it's a great example of when we have issues in our lives, (like losing by 20 to a 16 seed last year) and then what perseverance and determination (grounded in a strong foundation based on faith) can do!

Also, I think I actually owe you the \$40 I won in our family bracket pool because I wouldn't have picked the Cavaliers to win it if we had not met/talked. I needed the "OT" added score to increase the point total or I wouldn't have won the 4<sup>th</sup> place tiebreaker.

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**Here's an update regarding the Trane Partnership Status Update. As you are the internal "Land Mine Sweeper" for our partnership, I will appreciate some sweeping on your part:**

1. Please see string below: David Davis told Brice he has to ask Bill for permission to get us the requested data below.
2. Plus, see the highlighted items in yellow below.
3. I have not addressed any of this with Bill Ward nor copied him on this.
4. With your insight and edits, I will draft an email string with the letter signed by Lee, notes from our initial meeting with Bill, you, Mike, DD and our team.
  - a. I will also include some highlights of the meeting and Demo, etc. we had in our Denver Trane Office with Bill Ward and Michael Smith.

Greg, I think my intuition on some push back is starting to come through... i.e. Regarding wanting to be in control, look good and be right. There's some building system technical insight for you in this summary:

1. Bill told me there's no need to copy you or David or Lee on the correspondence. (i.e. wants to be in control)
2. Time will tell if he allows us to change his dated "Controls Spec" (see attached) based on the Education Partnership/Energy Lab/Living Lab discussions but we shall see.
  - a. I hope they don't try to come back with "the spec is the law" excuse.
    - i. I've seen this used many times before -- where an old spec or a rule than "overrides common sense" and/or doing the right thing or changing.

3. Without asking them, Davis Davis and Mike Posey told Brice that “PCC would be **unwilling** to entertain using a Trane Front End”
  - a. See the system overview **attached** that is needed in order to have the Energy Lab/Living Lab and the existing buildings integrate with the new buildings.
  - b. Trane’s IS “front end” or Ensemble overlay is an overlay that integrates all the various older and virtually un-used technology in place today and the new systems into one “seamless” system.
  - c. The “three for one option” we are proposing with us would include the Ensemble system that would provide students with all the analytics, control systems, energy optics, building performance and integrate all campus buildings for the living lab for building operators and students **AND** integrate the same system for the new buildings too.
  - d. Siemen’s offered a “Free” new Front End as part of their free East Campus Assessment they are doing. However as you can imagine, this would be a very costly “Free” option.

**In addition:**

1. I’d like to offer you and PCC an “On Site Symposium” by Trane to cast the vision of the Living/Learning Lab concept we have been discussing to:
  - a. invite you, David (Ian and Lee too?) Bill/his team, your HVAC professor, the new building engineering team (KC Mechanical) and DLR to attend.
  - b. Goal: to educate them on the Educational and Operational Integration of mechanical, electrical, controls, lighting, into the energy/living/learning lab concept.
2. See the two links to the YouTube video’s and the slides below:

I can only imagine the power of these tools and technology in the hands of both the students **AND** building operators working on this together!
3. Trane Intelligent Services – Uncover the Opportunities <https://www.youtube.com/watch?v=pj1W5Y1xlc&feature=youtu.be>

And at summary or at the end of the Symposium, we can use this video:

1. Trane Connected Buildings - Go Beyond video
2. [https://www.youtube.com/watch?v=u7ghqbcOm\\_4&feature=youtu.be](https://www.youtube.com/watch?v=u7ghqbcOm_4&feature=youtu.be)

Your Thoughts? See below and feel free to reply or call me.

Best,  
Jim

**Jim Knutson**  
*Director, Integrated Solutions*  
Trane Ingersoll Rand  
Direct/Mobile/Text: (303) 349-4281  
Email: [Jim.Knutson@Trane.com](mailto:Jim.Knutson@Trane.com)



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**From:** May, Brice <Brice.May@irco.com>

**Sent:** Tuesday, April 9, 2019 10:50 AM

**To:** Knutson, James <Jim.Knutson@trane.com>

**Subject:** RE: Arizona CS Projects Call

Jim,

See below for a summary of the meeting on 4-2-19 with David Davis/Mike Posey, and the information requested to date.

**Information requested to date by Trane (was included in the Letter to Proceed by Lee Lambert):**

- Mechanical/Electrical/plumbing Drawings of the buildings if available (or we can come make copies of them)
- Current fire evacuation plans
- We would look at Ice Storage, Battery Storage and other Renewable Energy options
- Commitment to offer Trane time to present and review our proposed project and financial structure with the intent or working with Trane as a partner should our project meet all desired goals of PCC stakeholders
- Water Bills--1 month will suffice; however, 12 months will enable us to conduct a full water balance.
  - o If you don't have access to water bills at this juncture, please identify the water/ sewer utility and schedule they fall under.
- Occupancy—Attending students, staff counts, and visitors counts will provide accurate usage data.
  - o If attendance and staff data are not available, please provide what you have.
- Copy of the Smith Group 10 year plan
- Copy of the GLHN consultation report
- Signed Letter of Authorization for Trane to request/collect energy/gas usage data on your behalf (attached)
- Agreement to answers to additional information and questions moving forward

**Highlights from the meeting on April 2nd: These were comments from David Davis and Mike Posey – Bill Ward was not in the meeting with Brice.**

- David required to ask for permission to request the info listed above – at this point, I have received gas bills for East Campus and West Campus (he mentioned that this would take some time to gather)
- Stemens currently performing a Preliminary Energy Assessment on East Campus
- Current front end campus wide – Allerton (Compass Essentials)
- Unwilling to entertain the possibility of using a Trane front end
- Provided PCC's official Controls Spec (attached)
- Currently a mix of Allerton/Delta/Inet controls across all campuses

West Campus – no schedule used, no economizing/temp resets or ECM's in general  
West Campus – Automation infrastructure issues; frequent comm loss issues that knock out entire system

Talk soon,

**Brice May**

Account Manager  
Trane Commercial Systems  
4520 S. Coach Dr  
Tucson, AZ 85714

Mobile: (480) 773-5905

Email: [brice.may@trco.com](mailto:brice.may@trco.com)



**TRANE** BUILDING  
ADVANTAGE



Ingersoll Rand.

**From:** ["Knutson, James" <Jim.Knutson@trane.com>](mailto:Jim.Knutson@trane.com)  
**To:** [gwilson@pima.edu](mailto:gwilson@pima.edu)  
**CC:**  
**Date:** 4/29/2019 4:53:55 PM  
**Subject:** DRAFT: Pima CC Foundation Golf

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Greg,  
Should I send this? Can you play?  
Thx,  
Jim

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Lee and Greg,  
I was thinking of sponsoring a 2<sup>nd</sup> Trane foursome and coming down for your foundation golf tournament that's on Saturday morning May 18<sup>th</sup>. If you're not already committed, would one or both of you like to join me in a foursome? I'm not even sure if either one if you like to play golf, but if so, let me know as soon as convenient so I can make arrangements.

Also, would it be helpful and/or do you have any interest in meeting on Friday May 17<sup>th</sup> any time between 11 AM and 5 PM or maybe a happy hour after work? Lee – we could discuss follow up from the NC3 meeting in MN and “level set” or provide additional insight for David, Ian, Greg and Bill? I will send an invite to any/all for a meeting if you'd like.

Best,  
Jim

**Jim Knutson**  
*Director, Integrated Solutions*  
Trane Ingersoll Rand  
445 Bryant St., Unit 5  
Denver, CO 80204  
Direct/Mobile/Text: (303) 349-4281  
Email: [Jim.Knutson@Trane.com](mailto:Jim.Knutson@Trane.com)



**From:** ["Knutson, James" <Jim.Knutson@trane.com>](mailto:Jim.Knutson@trane.com)  
**To:** [gwilson@pima.edu](mailto:gwilson@pima.edu)  
**CC:**  
**Date:** 5/20/2019 2:09:01 PM  
**Subject:** RE: IGA and FCA

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Greg,  
Good decision on limiting weekend work. I'm also working on that hard to accomplish task. Yes, the tourney was fun, absolutely a perfect morning and I made my flight back so a great couple of days.

In addition, thanks for the introduction of Jaime from DLR. I had a good but short visit with him and his PM (I think it was either Stan or Hank?) before the tourney. We plan to meet on my next trip to AZ (likely May 29<sup>th</sup> in Phoenix) prior to our 30<sup>th</sup> meeting with you and the PCC Exec team. I agree about full disclosure with Lee but also want to be wise about communicating a good plan of action that overcomes some of the past/current barriers that will end up with the best result for PCC.

Here's my suggestions for a plan moving forward that we can discuss:

1. If our feasibility study we are preparing meet's and/or exceeds Lee's, David's, Ian's and your plan or expectations, (we will have a brief overview on the 30<sup>th</sup> as we have not had a chance to complete the report seeing we still have not gotten our requested data from Bill) we would like to proceed with the detailed IGA/FCA contract through S.A.V.E. or Omnia/US Communities.
2. I have a current Omnia report that shows PCC has used Omnia/US Communities a number of times before. This would allow us to avoid a delay and also provide your team with a long overdue and much needed "trust but verify" report of needs, existing building savings, energy conservation measures (ECM's) and other opportunities on your campuses.
3. I realize Bill's comment and the old traditional narrative about Trane being self-serving, but as we discussed, that is just simply not true as we can provide so much more value working alongside you and PCC that this old and tired excuse can be overcome with a number of real life examples.
4. In addition, we will provide insight to a PCC NC3/Trane Energy Lab (and provide related NC3 certifications), and plans on how we can bolster and integrate the new buildings into a combined three phase Intelligent Services program offerings and related Refrigeration/HVAC Commercial and Residential learning programs at PCC.
5. I talked to Lee in our meeting on Friday and also Pat Archambault about having PCC be a National Trane Technician training center (with our Living Learning Lab (L3) and he thought Dan Reynolds (leads our entire Trane HVAC service department) would be interested in this possibility.

In closing, be prepared for someone to be very resistant and pull out a number of tactics and claims to prevent us from a deep dive into your facilities and systems.

i.e. delay, lack of information exchange, needing to give others a chance, and many others. If you want to do an RFP, the selection committee must

be your entire exec team and must not be done through Bill's department for obvious reasons.

Please forgive me for sending all these long emails but I'm more resolved than ever that we can repurpose millions of dollars that will be put to better use for students and create a Real Life Case Study that is accountable, measured, verified, and studied with hundreds of millions of data points through students ongoing training and involvement.

Gratefully,

Jim

**Jim Knutson**

*Director, Integrated Solutions*

Trane Ingersoll Rand

Direct/Mobile/Text: (303) 349-4281

Email: [Jim.Knutson@Trane.com](mailto:Jim.Knutson@Trane.com)

**From:** Wilson, Gregory <[gwilson@pima.edu](mailto:gwilson@pima.edu)>

**Sent:** Sunday, May 19, 2019 9:51 PM

**To:** Knutson, James <[Jim.Knutson@trane.com](mailto:Jim.Knutson@trane.com)>

**Subject:** Re: IGA and FCA

**Alert: This is an external email.**

Thanks, Jim. I'm glad we had a chance to catch up. I think the more we share with Lee and the team, the better. There is no point keeping the info.

Given the big changes with the center plans, now is a good time to get it all out on the table.

The Mrs. and I had a full weekend, and I tend to catch up on Sunday night. I hope the golf tournament went well! I will review this material and give you a call this week. Thanks again for helping us move forward. It will not be easy, but it will be worth it.

Greg

Greg Wilson

Dean of Applied Technology

Pima Community College

1255 N. Stone Avenue

Tucson, AZ 85709-3125

520-206-7134 office

520-904-0843 cell

[gwilson@pima.edu](mailto:gwilson@pima.edu)

On Sat, May 18, 2019 at 5:58 AM Knutson, James <[Jim.Knutson@trane.com](mailto:Jim.Knutson@trane.com)> wrote:

Greg,

I've been thinking this would be good for PCC to include in the Technical Audit or Investment Grade Audit (IGA) Phase. This additional Facility Condition Assessment (FCA) and Power Master Plan information will be helpful to understand not only the energy infrastructure through our energy audit but also power/central plant system conditions AND other systems. I would also mention that we would perform an operating cost analysis for the past year or two that would break out "maintenance" instead of "Repairs" as best we could. This is pretty typical for us to dive into and determine operating cost savings if a major capital infrastructure project. This would be very interesting...

See attached Call For Sessions response pdf and PPT that is just an initial submittal to Rocky Mountain APPA and slides from Jeff Duncan – Principle at Vanderweil Engineers. Jeff is a solid business partner of ours that would do a great job for you at PCC. Vanderweil was also selected in a competitive process for their project. PLUS, Vanderweil is also "third party to PCC" so the information you get would not be based on any internal or past local relationships or "filtering" of data.

In addition, this chart below from Colorado's State Architect shows a required submittal that makes up a Facilities Condition Index (FCI). The green lines is 65% of the index. That is what we provide in our Investment Grade Audit process. So with Vanderweil's work, PCC would get a reduced price (like a 2 for 1) with the full audit (facilities condition AND energy/water) ALL paid for out of energy savings. NOTE: The cost for both scope's of IGA/FCA work would be funded out of savings through the performance contract. (NO OUT OF POCKET CAPITAL COST TO PCC).

STATE OF COLORADO  
OFFICE OF THE STATE ARCHITECT



FACILITY CONDITION AUDIT AND INFRASTRUCTURE ASSESSMENT INSTRUCTIONS

| Building Systems        | System Rating | System Multiplier | System Deficiency | System Deficiency Cost |
|-------------------------|---------------|-------------------|-------------------|------------------------|
| Foundation              | 0.25          | 0.023             | 0.0058            | \$ 52,014              |
| Col. & Ext. Walls       | 0.55          | 0.048             | 0.0265            | \$ 238,448             |
| Floors                  | 0.21          | 0.138             | 0.0290            | \$ 261,236             |
| Roof                    | 0.61          | 0.056             | 0.0339            | \$ 305,658             |
| Ceiling                 | 0.6           | 0.044             | 0.0262            | \$ 236,596             |
| Int. Walls & Partitions | 0.61          | 0.068             | 0.0416            | \$ 375,427             |
| Windows                 | 0.27          | 0.036             | 0.0097            | \$ 87,645              |
| Doors                   | 0.32          | 0.037             | 0.0118            | \$ 106,664             |
| Cooling/Ventilation     | 0.55          | 0.108             | 0.0591            | \$ 533,212             |
| Heating                 | 0.44          | 0.108             | 0.0473            | \$ 426,570             |
| Plumbing                | 0.26          | 0.120             | 0.0311            | \$ 280,386             |
| Electrical              | 0.39          | 0.131             | 0.0511            | \$ 460,937             |
| Conveying               | 0.17          | 0.023             | 0.0039            | \$ 35,184              |
| Safety / Standards      | 0.2           | 0.061             | 0.0123            | \$ 110,673             |
| Totals                  |               | 1.0               | 0.3894            | \$ 3,510,651           |

**Jim Knutson**  
*Director, Integrated Solutions*  
Trane Ingersoll Rand  
445 Bryant St., Unit 5  
Denver, CO 80204  
Direct/Mobile/Text: (303) 349-4281  
Email: [Jim.Knutson@Trane.com](mailto:Jim.Knutson@Trane.com)



**From:** ["Knutson, James" <Jim.Knutson@trane.com>](mailto:Jim.Knutson@trane.com)  
**To:** [gwilson@pima.edu](mailto:gwilson@pima.edu)  
**CC:**  
**Date:** 5/30/2019 5:07:38 AM  
**Subject:** FW: Arizona CS Projects Call

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Greg,

Looking forward to talking later this morning.

FYI - It's really been a struggle to get building data over the past three months. See below. If we don't go ahead with an Investment Grade Audit Development after this meeting and you/Lee want us to complete our feasibility study first, (what we plan to do once we can get the data to evaluate and report on) we must put a hard deadline on Bill today to get us access to building plans and utility data.

This is needed in order to extrapolate the total campus savings potential. My guess is that since we got the LTP approved by Bill on Feb 13<sup>th</sup>, probably \$100,000/month of waste that's gone to the utility or about \$300,000 just since our kickoff meeting that could have been repurposed.  
Jim

**Jim Knutson**  
*Director, Integrated Solutions*  
Trane Ingersoll Rand  
Direct/Mobile/Text: (303) 349-4281  
Email: [Jim.Knutson@Trane.com](mailto:Jim.Knutson@Trane.com)

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**From:** May, Brice <[Brice.May@irco.com](mailto:Brice.May@irco.com)>  
**Sent:** Tuesday, April 9, 2019 10:50 AM  
**To:** Knutson, James <[Jim.Knutson@trane.com](mailto:Jim.Knutson@trane.com)>  
**Subject:** RE: Arizona CS Projects Call

Jim,

See below for a summary of the meeting on 4-2-19 with David Davis/Mike Posey, and the current status of information collection **IN RED** requested



to date.

**Information requested to date:**

- Mechanical/Electrical/plumbing Drawings of the buildings if available (or we can come make copies of them) – **Downtown campus received on 5-14, West campus not received (multiple requests)**
- Current fire evacuation plans – **Not Received, original request only**
- We would look at Ice Storage, Battery Storage and other Renewable Energy options – **N/A**
- Commitment to offer Trane time to present and review our proposed project and financial structure with the intent or working with Trane as a partner should our project meet all desired goals of PCC stakeholders – **N/A**
- Water Bills--1 month will suffice; however, 12 months will enable us to conduct a full water balance. – **West Campus received on 5-23, unable to view due to lack of access to Google Drive (requested access 5-24). Downtown Campus received on 4-8, unable to view due to lack of access to Google Drive (requested Drive access on 5-22)**
  - If you don't have access to water bills at this juncture, please identify the water/ sewer utility and schedule they fall under.
- Occupancy—Attending students, staff counts, and visitors counts will provide accurate usage data. **NOT received, original request only**
  - If attendance and staff data are not available, please provide what you have.
- Copy of the Smith Group 10 Year plan – **Received 4-9**
- Copy of the GLHN consultation report – **NOT received, original request only**
- Signed Letter of Authorization for Trane to request/collect energy/gas usage data on your behalf (attached) – **Received 4-17, had to request utility specific release forms on 5-16 (not received)**
- Agreement to answers to additional information and questions moving forward – **N/A**

**Note – David Davis has been out on Vacation for the last 2 weeks. He has been working from home on trying to get us access to the Drives.**

**Highlights from the meeting on April 2<sup>nd</sup>:**

- David required to ask for permission to request the info listed above – at this point, I have received gas bills for East Campus and West Campus (he mentioned that this would take some time to gather)
- Siemens currently performing a PEA on East Campus – currently offering a free Delta front end
- Current front end campus wide – Allerton (Compass Essentials)
- Unwilling to entertain the possibility of using a Trane front end
- Provided PCC's official Controls Spec (attached)
- Currently a mix of Allerton/Delta/Inet controls across all campuses
- West Campus – no schedule used, no economizing/temp resets or ECM's in general
- West Campus – Automation infrastructure issues; frequent comm loss issues that knock out entire system

Talk soon,

**Brice May**

Account Manager  
Trane Commercial Systems  
4520 S. Coach Dr  
Tucson, AZ 85714

Mobile: (480) 773-5905

Email: [brice.may@irco.com](mailto:brice.may@irco.com)

**From:** "Knutson, James" <Jim.Knutson@trane.com>  
**To:** [gwilson@pima.edu](mailto:gwilson@pima.edu)  
**CC:**  
**Date:** 6/4/2019 7:15:38 AM  
**Subject:** Computer version

Greg,

I'm looking forward to visiting in a bit. Some questions I've been thinking about since the meeting on Thursday for us to discuss: Why would Bill reject and do whatever he can to sidetrack our offer to help PCC repurpose millions of dollars of waste instead of donating it to the utility? Does he not see how we could have made him be the hero by simply using the excuse he hasn't had the funds or resources to make energy improvements. He could then be the headline speaker for how he's now saving the organization Millions of dollars!

So, unfortunately we hear:

1. Bill is telling his team that the Trane meeting didn't go well (even though Lee mentioned to me on the phone that David Dore thought it was a great meeting and he sees the amazing potential for our partnership).
2. Bill also said that we didn't step up in the meeting by offering to donate/contribute to PCC if we were to do the partnership (I think you know and/or you will see how much we will invest in this relationship) and as you can understand, that initial meeting is and was not the time for that conversation. Thus, we said that Pat Archaubault would be our connection on that.
3. He told us after the meeting and told us "the last I checked, I'm still in charge of facilities and this will have to go to an RFP process". It may be that is needed but it would not be necessary.
4. In addition, like my note last night suggests, if we put the development resources on this project and speed it up, it would save \$200K/month of lost opportunity cost.

So my conclusion is:

1. It has to be his overriding fear due to not looking good...



2. He's on the utility company payroll as they are giving him a very nice monthly check. Not likely...
3. There IS something to hide after years of "trusting but not verifying" ... I had a good visit with Lee about this and he agreed Bill's judgement may be clouded by his overriding fear of not looking good.
4. We believe that the only way for PCC to uncover the true opportunity is to do a very detailed energy and op cost audit. There has been a culture instilled by Bill that will need to be changed and also a lot of layers of methods and employees that have not known another way.
5. If we help to provide accountability – it will be another culture shock as there has been years of "little to no" accountability with his staff and support.
6. If it goes to an RFP, Bill will do everything in his power to select a company that will scratch the surface only and not uncover the real potential or he will do everything in his power to self-perform the projects.
7. He will employ some of these tactics: lack of full disclosure, delay tactics, digging up dirt or trying to find a negative reference, suggesting another firm is more qualified, probably sharing our material with other firms, potentially finding naysayers in the public, claiming a purchasing network selection will cause protests or legal action, etc. (not true).

**Jim Knutson**

Director, Integrated Solutions

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LET'S GO BEYOND™

**From:** ["Knutson, James" <Jim.Knutson@trane.com>](mailto:Jim.Knutson@trane.com)  
**To:** [gwilson@pima.edu](mailto:gwilson@pima.edu)  
**CC:**  
**Date:** 7/19/2019 5:59:04 AM  
**Subject:** Fwd: Clarksville Factory Trip - Aug 15th-Aug 17th  
**Attachments:** [RMT\\_Clarksville\\_Trip\\_Aug2019.pdf](#)

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Fyi. example of a factory trip we can do with your design and technology leaders. We will take whomever can go and/or also to White Bear Lake MN to our controls manufacturing site. Lee Lambert was there with me at the NCS board meeting. He can tell you about it.

Jim Knutson, Director of Integrated Solutions  
Ingersoll Rand/Trane  
Mobile/Direct: 303-349-4281  
Email: [Jim.Knutson@Trane.com](mailto:Jim.Knutson@Trane.com)

(Sent from my mobile phone so please excuse typos)

**From:** Felix, Shelby  
**Sent:** Wednesday, June 26, 4:43 PM  
**Subject:** FW: Clarksville Factory Trip - Aug 15th-Aug 17th  
**To:** Bases, David, Clough, Sam, Headings, David, Jeffries, Travis, Knutson, James, Noone, Joey, Starkey, Rolla, Torres, Daniel, White, Doug, Felix, Shelby  
**Cc:** Lupton, Austin, Donahue, Jon

Gents,

Austin is working on getting a factory trip to Clarksville together. Please read details below. Also, attached is a nice flyer with information Amy put together. If anyone is interested in joining with customers please let us know. This should be a good opportunity to bond with customers and educate them on some Trane RTUs!

Thanks!

**Shelby Felix | Systems Account Manager**  
**Trane Commercial Systems**  
**Rocky Mountain District**  
**Office: 303-228-2863 Mobile: 469-222-4645**

**From:** Lupton, Austin <Austin.Lupton@trane.com>  
**Sent:** Friday, June 21, 2019 3:24 PM  
**Subject:** RE: Clarksville Factory Trip - Aug 15th-Aug 17th

All,

Amy threw together a pretty cool flyer for the Clarksville/Nashville trip. Take a look and forward to customers if you are thinking about going.

- Also, I spoke to Matt and he thought that the below schedule and product emphasis is best.
- Do both light commercial and large commercial production floor tours
  - Go through Ipak 1,2 and Symbio products
  - Go through Symbio Control capability
  - Touch on our WSHPs and the high level advantages and differentiators.

Thanks!

Austin B. Lupton |Account Manager

**From:** Lupton, Austin  
**Sent:** Friday, June 21, 2019 9:45 AM  
**To:** Cicciarelli, Joseph <[Joe.Cicciarelli@irco.com](mailto:Joe.Cicciarelli@irco.com)>; Everly, Ryan <[Ryan.Everly@trane.com](mailto:Ryan.Everly@trane.com)>; Diehl, Matt <[mkdiehl@trane.com](mailto:mkdiehl@trane.com)>; Eitemiller, Evan <[EvanP.Eitemiller@trane.com](mailto:EvanP.Eitemiller@trane.com)>; Felix, Shelby <[Shelby.Felix@trane.com](mailto:Shelby.Felix@trane.com)>; James, Jacob <[jschedlbauer@trane.com](mailto:jschedlbauer@trane.com)>; Redman, Mark <[mredman@trane.com](mailto:mredman@trane.com)>; Sayre, Ryan <[Ryan.Sayre@trane.com](mailto:Ryan.Sayre@trane.com)>; Schedlbauer, Steve <[sischedlbauer@trane.com](mailto:sischedlbauer@trane.com)>; Schwenk, Michael <[MSchwenk@trane.com](mailto:MSchwenk@trane.com)>; Stewart, Matthew <[Matthew.Stewart@trane.com](mailto:Matthew.Stewart@trane.com)>; Weaver, Nick <[Nick.Weaver@trane.com](mailto:Nick.Weaver@trane.com)>; Wolf, Andrew <[Andrew.Wolf@trane.com](mailto:Andrew.Wolf@trane.com)>; Chapman, Gavin <[GJChapman@trane.com](mailto:GJChapman@trane.com)>; Cays, Keith <[Keith.Cays@trane.com](mailto:Keith.Cays@trane.com)>; Beech, Dean <[Dean.Beech@trane.com](mailto:Dean.Beech@trane.com)>; Lanphier, Anthony <[Tony.Lanphier@trane.com](mailto:Tony.Lanphier@trane.com)>; Stewart, Matthew <[Matthew.Stewart@trane.com](mailto:Matthew.Stewart@trane.com)>  
**Subject:** RE: Clarksville Factory Trip - Aug 15th-Aug 17th

All,

I should've mentioned this in the previous email, but the dates I threw out are through Saturday and some people may not want to give up

that family time. With that being said, it may be beneficial to throw out the option for them to leave Friday. My thought is that Nashville is an awesome town and an additional night would be more fun and make it a more memorable trip. Handle it however you want, but I wanted to throw that out there.

Thanks!

Austin B. Lupton |Account Manager

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Parts Counter: 303.228.3310

email: [austin.lupton@trane.com](mailto:austin.lupton@trane.com)

**From:** Lupton, Austin

**Sent:** Friday, June 21,

**Subject:** RE: Clarksville Factory Trip - Aug 15th-Aug 17th

All,

It looks like we landed on Aug 15<sup>th</sup> – Aug 17<sup>th</sup> for the Clarksville trip. Clarksville is looking for a rough head count soon, so can we get a tentative number of who would be going and how many customers you would bring. This is an immediate need so please get back to me with a rough idea by the end of next week.

My rough idea of a schedule is below:

- Stay in Nashville, about 45 min – 1 hour from Clarksville
- Arrive Thursday mid-day/afternoon.
- o Then hit up this music free festival after dinner <https://www.liveonthegreen.com/schedule/#/> (for those who like good music, Gary Clark Jr plays the night we are there)

- Do the factory tour on Friday
- Do a group dinner Friday night and then we tear up Nashville!
- Leave midday-afternoon Saturday

The factory tour is described below. We need to decide what product presentations we want to see. We can discuss this at the next sales meeting as it isn't an immediate need, but our options are: Voyager 12.5-50, Precedent, Foundation, Odyssey, IPAK I,II Symbio, RAUJ CAUJ, CSC's, Water Source Heat Pumps. One of them will definitely be the Intellipaks. Let me know what else y'all would like to do.

**From:** ["Knutson, James" <Jim.Knutson@trane.com>](mailto:Jim.Knutson@trane.com)  
**To:** [jlambert@pima.edu](mailto:jlambert@pima.edu)  
[gwilson@pima.edu](mailto:gwilson@pima.edu)  
[PArchambault@trane.com](mailto:PArchambault@trane.com)  
**CC:** [dan.ramirez@nc3.net](mailto:dan.ramirez@nc3.net)  
[roger.tadajewski@nc3.net](mailto:roger.tadajewski@nc3.net)  
[michael.mcalice@nc3.net](mailto:michael.mcalice@nc3.net)  
[Rob.Wax@trane.com](mailto:Rob.Wax@trane.com)  
[IDonahoo@trane.com](mailto:IDonahoo@trane.com)  
**Date:** 2/16/2019 4:15:40 PM  
**Subject:** Thank You

---

Lee and Greg,

What a great day on Thursday and it was a very productive and insightful meeting on Friday morning. We are truly appreciative of the opportunity to be a part of your National Signing Day event and to meet with you both on Friday as well. We look forward to continuing the discussion on how the value of the Trane/NC3 partnership can be multiplied in many ways across Pima Community College campuses.

We will be sending the *Letter To Proceed* email that will allow us to develop a no-cost feasibility report for you on ways to leverage savings and integrate PCC programs. The outcome of this initial evaluation will help us to provide you with valuable data and insight on how we can create a more efficient and improved learning environment while integrating "living-lab" analytics options for your students.

Gratefully,

Jim and the Trane Team

**Jim Knutson**

*Director, Integrated Solutions*

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“BUILDING CUSTOMERS FOR LIFE”



**From:** ["Knutson, James"](mailto:Jim.Knutson@trane.com) <[Jim.Knutson@trane.com](mailto:Jim.Knutson@trane.com)>  
**To:** [jlambert@pima.edu](mailto:jlambert@pima.edu)  
**CC:**  
**Date:** 5/6/2019 2:56:07 PM  
**Subject:** House HVAC Discussion Follow Up

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Lee,

When we were in Minnesota you mentioned you have a Trane unit on your home that is or has gotten loud. I'd like to see if one of our technicians and/or an engineer could stop by and take a look at it to see if we might help.

Let me know if that is of interest and we will have our team in Tucson get a site visit scheduled.  
Best,  
Jim

**Jim Knutson**

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**From:** ["Lambert, Lee" <llambert@pima.edu>](mailto:llambert@pima.edu)  
**To:** [Jim.Knutson@trane.com](mailto:Jim.Knutson@trane.com)  
**CC:**  
**Date:** 4/28/2019 6:14:13 PM  
**Subject:** Re: Thank You and Presentation

---

Hi Jim, it was good to see you last week. I enjoyed my visit and getting to know you. The work you and your Trane colleagues are doing is impressive. I love the values Trane stands for. I look forward to our work together. Best, Lee

On Fri, Apr 26, 2019 at 3:51 PM Knutson, James <[Jim.Knutson@trane.com](mailto:Jim.Knutson@trane.com)> wrote:  
Lee,

Just a quick thanks for the good visit and chance to get to know you at the NC3 Board Meeting. I hope the presentations, tours and chance for you to get to know about us/Trane was helpful. I'm so much looking forward to helping you and your PCC team with our integrated Lab/Existing Systems/New Building "living lab" programs.

I'm copying you on the "Knowledge Is Power" PPT presentation in case you want to use any of these slides to communicate to your team. As per your suggestion, I will be including you, David, Greg and Bill on my emails and status updates going forward. Also, I'm going to send you more US Communities & Omnia Procurement/Purchasing Group information in my next email. Here is their website link that Trane is a member of that would allow PCC to contract with us to get the projects underway. Let me know if I can help with how to explain the many ways this can benefit PCC going forward.

<https://www.omniapartners.com/publicsector/us-communities-an-omnia-partner>

<https://www.omniapartners.com/publicsector/contracts/supplier-contracts/trane?hsCtaTracking=42994911-b91e-4180-b1a7-99e34d012337%7C614ab489-338f-4624-98a0-cad2b8a8a4d0>

Best,

Jim

**Jim Knutson**

*Director, Integrated Solutions*

Trane Ingersoll Rand

[445 Bryant St., Unit 5](#)

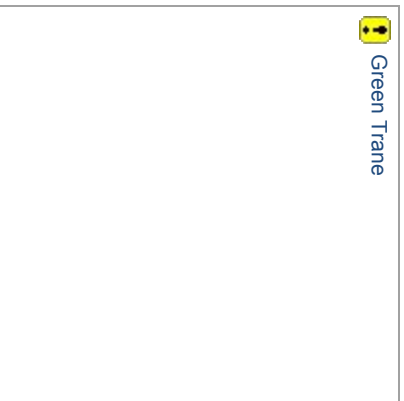
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Green Trane



**“BUILDING CUSTOMERS FOR LIFE”**



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**CC:** [Dan.Beyer@irco.com](mailto:Dan.Beyer@irco.com)  
[Brice.May@irco.com](mailto:Brice.May@irco.com)  
[Parchambault@trane.com](mailto:Parchambault@trane.com)  
**Date:** 5/1/2019 6:49:23 AM  
**Subject:** PPC Exec Team Meeting and Golf Tourney  
**Attachments:** [NC3 Board Meeting Preso Draft PPT rev3.pdf](#)

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Lee,  
I'm planning on sponsoring a 2<sup>nd</sup> Trane foursome and coming down for your golf tournament on Saturday morning May 18<sup>th</sup>. I would arrive at 9:30 AM in Tucson on the morning of Fri the 17<sup>th</sup>.

I emailed Greg on Monday night and he also thought it would be good to get your team together and discuss some of the items and value propositions from the NC3 Board meeting in MN. The goal would be to "level set" or provide insight and review the Trane Energy Lab, existing building upgrades and a Living Lab, plus share some ideas on new construction building systems as a learning lab with your executive team (you, David, Ian, Greg and Bill). See attached PPT as an example to use in the meeting.

If this level setting meeting is of interest, please suggest a good time on Friday the 17<sup>th</sup> (after 10:30 AM) or suggest another date or two that might work for your team and we will do our best to accommodate. I'd say 1.5 hours would be good meeting length depending on availability and discussion questions that may come from the attached PPT.

Note: I will be in AZ and could be in Tucson on May 10<sup>th</sup> if that date is a possibility or better for you. Also, a few future dates that would work are May 27-30, and June 5<sup>th</sup>-7<sup>th</sup>)  
Best,  
Jim

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