



DANNY CLEMENS, DIRECTOR
TRACY PARSLEY, MAINTENANCE SUPERVISOR
THOMAS STOKES, CUSTODIAL SUPERVISOR
GEORGE BROCK, ENERGY MANAGER

DEPARTMENT OF FACILITIES

MEMO

TO: Dr. Jesse Bacon, Superintendent
FROM: Danny Clemens, Director of Facilities
Date: September 15, 2025
RE: BEHS Fine Arts - BG 23-050 - Test and Balance Services **DC**

There were two Test and Balance proposals for the Bullitt East Fine Arts Renovation and Addition . After review, we recommend awarding TAB services to Synergy Test and Balance. The post-bid BG-1 did not include a dedicated line item for Test and Balance Services; however, these costs can be covered under the Commissioning line item. The allocation for Commissioning is \$130,000, and services for this facility are quoted at \$71,250.00. A recommendation for Thermal Balance was originally made to the Board on August 26, 2024. However, when a purchase order was being generated, the vendor revised their proposal based on an addendum, which increased the cost beyond the competing proposal. For this reason, we are now submitting a new recommendation for TAB services.

Proposals received are outlined listed below and attached for Board Review:

- Synergy Test and Balance: \$39,397.00 (Recommended)
- Thermal Balance: \$42,220.00
- Flo-Tech: Non-Responsive
- Kahoe Test and Balance: Non-Responsive

I recommend approval of this request.

.Attached paperwork is listed below with *action items* noted for each:

- Synergy Test and Balance Quote: Sign page 2
- Thermal Balance: Quote: Board Reference

OUR MISSION IS TO INSPIRE AND EQUIP OUR STUDENTS TO SUCCEED IN LIFE

BULLITT COUNTY PUBLIC SCHOOLS IS AN EQUAL EDUCATION AND EMPLOYMENT INSTITUTION



Synergy Test and Balance

8355 Rockville Road Suite 36 | Indianapolis, IN 46234 | Tel. (317) 222-1828
154 Burt Road | Lexington, KY 40503

PROJECT: Bullitt County Public Schools DATE: 08/08/2025
Bullitt East High School Fine Arts Addition
Mt. Washington, KY
Drawings: 11/1/2023
Addenda: 1, 2, 3, 4, & 5
Specification: 203100

The amount referenced below reflects our cost to perform Test and Balance (TAB) Services for equipment listed below.

TAB Base Bid: \$39,397.00
TOTAL: \$39,397.00

Duct Leakage Test Per Trip Cost: \$1,000.00

Please be advised of the following:

- 1) Synergy Test and Balance performs work as an independent, third party owner advocate in accordance with AABC National Standards to accomplish the established scope of work.
- 2) Each contractor must include time in their proposal to perform stipulated tests. The costs associated with other contractors' work are not included in the Synergy Test and Balance fee amount.
- 3) Contractors not adhering to the TAB schedule will assume responsibility for lost time of other participating contractors, consultants, and owner's personnel.
- 4) Retests required due to concealed conditions, design, or installation issues are not included in our base scope of work.
- 5) Lost time or issues related to the requirements noted above will be reported to the project manager in a timely manner following the occurrence.
- 6) Please note this price is based on an unoccupied facility unless indicated below.

Please note our standard hourly rates for services extended beyond the scope of this proposal can be provided upon request.

Thank you for the opportunity to provide a quotation on the above referenced project. Please call if there are any questions: (317) 222-1828 or FAX: (317) 451-8079

NOTE: This quote is firm for thirty (30) days.

SYNERGY TEST AND BALANCE, INC.

Cheryl L. Yates, President
Cheryl@SynergyTAB.com



Synergy Test and Balance

8355 Rockville Road Suite 36 | Indianapolis, IN 46234 | Tel. (317) 222-1828
154 Burt Road | Lexington, KY 40503

THIS PROPOSAL IS ACCEPTED:

BY:

TITLE:

DATE:

PRINTED NAME:

ORGANIZATION NAME:



Synergy Test and Balance

8355 Rockville Road Suite 36 | Indianapolis, IN 46234 | Tel. (317) 222-1828
154 Burt Road | Lexington, KY 40503

Equipment List

- DOAS-1 (Qty. 1)
- Water Source Heat Pumps (Qty. 29)
- Heat Pump Chiller (Qty. 1)
- Hydronic Pumps (Qty. 7)
- Kitchen Exhaust (KEF, MAU, and (4) Hoods)
- EF's (Qty. 7)
- VAV's (Qty. 26)
- Balance Dampers (Approx. 25)
- GRD's (Approx. 475)
- Geothermal Wellfield
- DHW Balance – Balancing Valves (Qty. 5)
- DHW Balance – DHW Pumps (Qty. 3)
- *Equipment not included in this list is specifically excluded from our quote

Notes

- Commissioning Support
- Final Inspection – 203100
- PDF Copy of TAB Report

Exclusions

- Pre-demo readings
- Existing equipment balance
- EH/IH Units
- Ductless Split Systems
- Electric Heaters
- HVLS/Circulation Fans
- Sound and Vibration tests
- Sheave and belt changes
- Installation of dampers or valves
- Termination of wiring
- Installation of filters
- Installation of test ports for hydronic balance
- Installation of any other accessories or components
- Fees associated with memberships, subscriptions, or 3rd party requirements
- Software or Hardware required to access BAS
- Hydrostatic testing
- Steam Balance
- Refrigerant measurements
- Overtime, Weekend, or Night work
- Lifts or scaffolds



THERMALBALANCE INC.

ThermalBalance.com

Date: May 3, 2024

AABC Certification #89-06-23

TBI Quote #Q139990

This quote is to perform the test and balance services per the *AABC Standards for Field Measurement and Instrumentation, Seventh Edition, 2016*. Any deviations or clarifications are listed below. This quote is valid for 30 days from the date of issuance and shall become an attachment to any contract provided. Unless noted below this price is based on an unoccupied facility and regular working hours. Fees for individually listed services are valid only on acceptance of the TAB contract.

Project: BULLITT EAST HIGH SCHOOL -
FINE ARTS ADDITION
MT. WASHINGTON, KY

Total: \$42,220.00

Provided Services:

- | | | | |
|---|--|--|--|
| <input checked="" type="checkbox"/> Air Balance | <input type="checkbox"/> Sound Testing | <input checked="" type="checkbox"/> Cx Team Member | <input type="checkbox"/> System Analysis |
| <input checked="" type="checkbox"/> Water Balance | <input type="checkbox"/> Vibration Testing | <input type="checkbox"/> Pretesting | <input checked="" type="checkbox"/> Domestic Water |

Excluded Services:

1. Any sheaves, belts, balancing or control devices or installations thereof
2. Any lifts or scaffolding, as-builts, cleaning, lubing or uniform space temperature balancing
3. Any return trips for inoperable equipment, deficiencies, troubleshooting, report reviews, or final inspections
4. Any subscriptions, memberships or 3rd party requirements
5. Hardware and/or software for DDC and/or electronic control systems

Remarks:

Prior to any scheduling, a purchase order must be sent to contracts@thermalbalance.com.

Nicholasville, KY 859.277.6158
Paducah, KY 270.744.9723



ThermalBalance.com

Ashland, KY 606.325.4832
Nashville, TN 615.768.5461

