



October 7, 2025

Suzanne Irwin
101 Old Lafayette Ave.
Lexington, Kentucky 40502

Re: *Test and Balance Proposal Recommendation*
Henderson South Middle School HVAC Renovation
Henderson, Kentucky
Marcum No. 24618

Dear Suzanne,

A Bid Opening was held on September 24th for the Henderson South Middle School project. Marcum Engineering has reviewed the low proposal by Synergy Test and Balance's. Based on the attached Bid Tabulation and proposal; Marcum Engineering recommends acceptance of Synergy Test and Balance's proposal in the amount of \$45,346.75.

Sincerely,

Elijah Arteburn, PE, LEED AP BD+C
Project Manager

Enclosure: Bid Tabulation
 Synergy Test and Balance Proposal

cc: Baccus Oliver, Marcum Engineering
 Colton Miller, Codell Construction
 Beth Bauer, Rosstarrant Architects

PROPOSAL TABULATION

TEST AND BALANCE SERVICES
HENDERSON SOUTH MIDDLE SCHOOL HVAC RENOVATION
HENDERSON , KENTUCKY
MARCUM NO. 24618
10/7/2025

CONTRACTOR	TAB BASE BID AMOUNT	TAB ALTERNATE AMOUNT	DUCT TESTING AMOUNT FOR 60 HRS	DUCT TESTING PER HR	TOTAL PROPOSAL AMOUNT W/ ALTERNATE
Thermal Balance Inc.					\$59,960.00
Synergy Test and Balance	\$39,346.75	\$0.00	\$6,000.00	\$100.00	\$45,346.75



Synergy Test and Balance

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

PROJECT: Henderson County Board of Education DATE: 09/24/2025
South Middle School HVAC Renovation
Henderson, KY
Drawings: 7/22/25
Addenda: 1 to 6
Specification: 230593

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

TAB Base Bid:	<u>\$39,346.75</u>
DALT Base Bid (60-Hrs):	<u>\$6,000.00</u>
TOTAL:	<u>\$45,346.75</u>
Duct Leakage Test Hourly Rate:	<u>\$100.00</u>

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.
- 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) This price is based on an unoccupied facility unless indicated below.
- 7) Synergy will note functional or installation issues in a Field Report and back check one time. Issues not corrected will be included in the final TAB Report. Subsequent rebalance of those systems will result in additional charges.

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

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THIS PROPOSAL IS ACCEPTED:

BY:

TITLE:

DATE:

PRINTED NAME:

ORGANIZATION NAME:



Synergy Test and Balance

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Equipment List

- OAU-1,2,3,4,5
- Console Heat Pumps/Water Source Heat Pumps
- Hydronic Pumps
- AC-1
- GRD's
- Kitchen Exhaust
- EF's
- Geothermal Wellfield
- *Equipment not included in this list is specifically excluded from our quote

Notes

- Commissioning Support - 230800
- PDF Copy of TAB Report

Exclusions

- Domestic Water Balance
- 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