

Request for Proposals (RFP) Service & Repair (6) Six Boilers

Barton Tower

Barton Annex; Cooling Tower Service

Owner: Indianapolis Housing Agency (IHA)

RFP No.: 092425

Issue Date: September 24, 2025

Proposals Due: Wednesday, 10/15/2025 at 3:00 PM EST (Eastern Standard Time)

Contact for Questions:

Gene Dibbern @ gdibbern@indyhousing.org

Mobile: 317 281-6172

1. Introduction & Purpose

The Indianapolis Housing Agency (IHA) invites qualified HVAC/boiler contractors to provide **one-time service and minor repair** for six (6) boilers—three at Barton Tower and three at Barton Annex—and to perform **cooling tower service**. Work includes furnishing and installing manufacturer-approved **rebuild kits** for each boiler, performing full annual service/combustion setup, and replacing **one (1) OEM control panel** on an AERCO unit at Barton Tower (with unit pricing for additional control panel replacements if required), plus cooling tower belt inspection/adjustment, cleaning, and bearing lubrication.

IHA intends to award a single contract to the **lowest responsive and responsible bidder** considering price and evaluation factors defined herein.

2. Project Sites & Equipment

A. Barton Tower – 555 Massachusetts Avenue Indianapolis, IN 46204

- (3) **AERCO Benchmark** boilers, Model **BMK 2500**
Condition/Need: Provide and install OEM rebuild kits on all three; at least **one (1)** requires **new OEM control panel**.

B. Barton Annex – 501 North East Street Indianapolis, IN 46204

- (3) **Lochinvar CREST** boilers, Model **FBN2001 (Series 110)**
Condition/Need: Provide and install OEM rebuild kits on all three.

C. Lugar Tower – 901 Fort Wayne Avenue Indianapolis, IN 46202

- (5) **Fulton Pulse PAK Hydronic** boilers, Model **PHW-2000**
Condition/Need: Provide and install OEM rebuild kits on all five.

D. Cooling Tower – serving [Barton Tower 555 Massachusetts Ave Indianapolis IN 46204
Barton Annex] 501 North East Street Indianapolis IN 46204

- *Service Required:* Inspect and adjust belt tension, **clean** (fan housing/screens/basin as accessible), and **grease/lubricate bearings** per manufacturer guidance. Provide **unit price** for belt replacement if required.

Note: Contractors are responsible for verifying all site conditions, clearances, utilities, and access before bidding. A pre-bid walkthrough is strongly recommended.

3. Scope of Work (Base Bid)

3.1 General

1. Provide all labor, OEM parts, materials, consumables, tools, lifts, and freight for a **turn-key** service.
2. Follow manufacturer procedures for AERCO Benchmark BMK 2500 and Lochinvar CREST FBN2001 (Series 110).
3. Use **OEM** (or OEM-approved) parts only; no aftermarket substitutions without written IHA approval.
4. Lockout/Tagout, hot-work controls (if applicable), and all safety measures required by OSHA and the sites.

3.2 Boiler Service Tasks (all eleven (11) units)

- Provide and install **manufacturer rebuild kits** including, where applicable: gaskets/seals, igniters/electrodes, flame sensors, O-rings, sight glass seals, filters/strainers, venturi/orifices, and other kit components as defined by OEM for annual or major service.
- Open/clean and inspect heat exchangers, burners, and condensate traps, clean flue passageways as accessible.
- Verify gas train operation; leak test; inspect valves and combustion air paths.
- Replace worn belts in associated equipment (if any internal to boiler) **only if approved** via unit price (see Bid Form).
- Perform **combustion analysis & tuning** to manufacturer specs across low, mid, and high fire; document O₂, CO, CO₂, stack temp, and excess air.
- Update firmware/parameters if recommended by OEM (with IHA approval).
- Replace inline water filters/strainers serving the boilers as applicable.

- Calibrate/verify sensors (supply/return temp, flow, pressure) and safety (HLP, LWP, HLT, flame safeguard).
- Check pumps interlocks, enable signals, and BMS points, document any faults.

3.3 Control Panel Replacement (Barton Tower – AERCO)

- Provide and install **one (1) OEM AERCO BMK 2500 control panel/controls assembly** including all wiring terminations, configuration, and commissioning.
- Provide **unit price** for **additional** AERCO control panel replacements, if diagnostics reveal more are needed (see Bid Form). Additional replacements will be authorized by a change order at the unit price.

3.4 Cooling Tower Service

- Lockout/Tagout; remove guards as needed.
- Inspect/adjust **belt tension**, record condition.
- **Clean** fan housing/screens and accessible basins (light debris); flush and wipe down accessible areas.
- **Grease/lubricate bearings** per OEM intervals/specs.
- Provide **unit price** for **belt replacement** if required.

3.5 Deliverables

- **Service Report** per unit (before/after photos; parts installed with serial/lot numbers; combustion readings; setpoints; alarms cleared; deficiencies and recommendations).
- **Warranty** certificates for parts; list of serial numbers/firmware.
- **Closeout**: updated equipment tags, date of service stickers, and electronic copies of all reports within **5 business days**.

4. Optional Add Alternates (Price Separately)

- **Alt A**: Annual preventive maintenance for the same equipment for **up to three (3) option years**, same scope as Base (without control panel unless required). Price per year.
- **Alt B**: **Water-side cleaning/descaling** of heat exchangers (if fouling is observed), per boiler.
- **Alt C**: **Flue inspection & cleaning** beyond standard brushing (include camera inspection), per boiler stack.

5. Contractor Qualifications

- Minimum **5 years'** verifiable experience servicing commercial condensing boilers $\geq 2,000$ MBH.

- **Manufacturer certifications** for AERCO Benchmark and Lochinvar CREST (submit copies).
- Demonstrated combustion analysis proficiency (submit sample report).
- References for **three** similar projects within the last 36 months.

6. Schedule & Access

- **NTP (anticipated): October 22, 2025**
- **Substantial Completion:** within **30 calendar days** of NTP.
- Work hours: [8:00 AM–5:00 PM] local, Mon–Fri, unless otherwise coordinated. After-hours work must be approved in advance.

7. Proposal Requirements

1. **Bid Form** (Section 11) fully completed and signed.
2. **Project Approach** (≤3 pages): staffing, sequence, safety, QA/QC, testing & commissioning.
3. **Qualifications** (certifications, resumes, references).
4. **Schedule** with key milestones.
5. **Insurance** certificates & endorsements (see Section 9).
6. **Exceptions/Clarifications** (if any) – list separately.

- **Pre-Bid Walkthrough: Thursday, 10/02/2025**
11:00 am. (Eastern Standard Time) EST
Meeting Location: John Barton Annex
501 North East Street
Indianapolis IN 46204
RSVP to the Contact: Gene Dibbern – Mobile 317 281-6172

Deadline to submit Question: 10:am Wednesday, 10/08/2025 (Submit via email.)
Deadline to receive Question & Answer 1:00 pm Monday, 10/13/2025

8. Evaluation & Award

IHA will evaluate proposals on the following weighted criteria:

- **Price (Base + selected Alternates + unit rates) – 50%**
- **Qualifications & Certifications – 25%**
- **Project Approach & Schedule – 20%**
- **References – 5%**

IHA reserves the right to waive informalities, negotiate scope, accept or reject any/all proposals, and award in the best interest of IHA.

9. Terms - Compliance & Insurance

- Comply with all applicable federal, state, and local laws, including equal employment and non-discrimination.
- If prevailing wage requirements are determined to apply to any portion of the work, the Contractor shall comply as directed by IHA.
- **Insurance (minimum):**
 - Commercial General Liability: **\$1,000,000** per occurrence / **\$2,000,000** aggregate
 - Automobile Liability: **\$1,000,000** combined single limit
 - Workers' Compensation: Statutory + Employers' Liability **\$500,000**
 - Umbrella/Excess: **\$2,000,000**
 - Additional Insureds (including primary & non-contributory) and Waiver of Subrogation in favor of IHA required.
- All work shall carry a **1-year labor warranty** and OEM parts warranty.

10. Invoicing & Payment

- Submit invoices with service reports and photos.
- Progress payments permitted if authorized, otherwise single invoice upon acceptance.
- Parts are reimbursed at bid pricing, no additional markups beyond those bids.
- Freight included unless listed on Bid Form.

11. Bid Form (Complete & Submit)

A. Base Bid – Boiler Service & Minor Repair

A1. Barton Tower — AERCO Benchmark BMK 2500 (3 units)

Item	Qty	Unit	Description	Unit Price	Extended
A1.1	3	EA	OEM rebuild kit supply & install, full annual service & combustion tuning	\$ ____	\$ ____
A1.2	1	EA	OEM control panel replacement (one unit), install & commission	\$ ____	\$ ____

A2. Barton Annex — Lochinvar CREST FBN2001 Series 110 (3 units)

Item	Qty	Unit	Description	Unit Price	Extended
A2.1	3	EA	OEM rebuild kit supply & installation, full annual service & combustion tuning	\$ ____	\$ ____

A3. Lugar Tower — Fulton Pulse PAK Hydronic PHW-2000 (5 units)

Item	Qty	Unit	Description	Unit Price	Extended
A3.1	5	EA	OEM rebuild kit supply & installation, full annual service & combustion tuning	\$ ____	\$ ____

Subtotal Base Bid (A1 + A2 + A3): \$ ____

B. Cooling Tower Service

Item	Qty	Unit	Description	Unit Price	Extended
B1	1	LS	Belt inspection/adjustment, cleaning of accessible components, grease/lubricate bearings	\$ ____	\$ ____

Subtotal Cooling Tower (B): \$ ____

Base Bid + Cooling Tower (A + B): \$ ____

C. Unit Prices (as-needed, not in Base unless authorized)

Item	Unit	Description	Unit Price
C1	EA	Additional AERCO BMK 2500 control panel replacement (labor + OEM panel)	\$ ____
C2	EA	Additional boiler rebuild kit (any model listed), supply & install	\$ ____
C3	EA	Cooling tower belt replacement (labor + belt)	\$ ____
C4	HR	Technician hourly – regular hours	\$ ____
C5	HR	Technician hourly – after hours/emergency	\$ ____
C6	%	Parts markup over contractor cost (max ____%)	____%

Item Unit	Description	Unit Price
C7	LS Freight (if not included above)	\$__

D. Add Alternates (price separately)

Alt Qty Unit	Description	Unit Price	Extended
D1 1	YR Annual PM – all 11 boilers (Year 1 after Base)	\$__	\$__
D2 1	YR Annual PM – all 11 boilers (Year 2 option)	\$__	\$__
D3 1	YR Annual PM – all 11 boilers (Year 3 option)	\$__	\$__
D4 11	EA Water-side cleaning/descaling per boiler	\$__	\$__
D5 11	EA Flue enhanced inspection/cleaning per stack	\$__	\$__

E. Acknowledgements

- We will use **OEM parts** and follow OEM procedures: ☐ Yes
- We hold current **AERCO, Lochinvar, and Fulton** service certifications: ☐ Yes (attach)
- We agree to a **1-year labor warranty** and OEM parts warranty: ☐ Yes
- We can meet the **30-day** completion window after NTP: ☐ Yes

Company Name: _____

Authorized Representative (sign): _____

Date: _____

Email/Phone: _____

12. General Conditions

- Work areas to be left clean; debris removed daily.
- Protect existing machines, equipment, and occupied areas; repair any damage at no cost to IHA.
- Coordinate outages with IHA at least **72 hours** in advance.
- Any additional defects discovered shall be documented with photos and priced via the **Unit Prices** for pre-approval.
- Substitutions must be requested **in writing before bid** with OEM documentation.

End of RFP

13. Attachments

Use this template to capture complete equipment information during pre-bid and at NTP. Submit an updated, finalized copy at closeout.

A1. Summary – Boilers by Site

Site	Building	Manufacturer	Model	Qty	Fuel	Condensing	Location/Room	Notes
Barton Tower	Boiler Plant	AERCO	BMK 2500 (Benchmark)	3	NG	Yes	Boiler Room [ID]	One control panel to be replaced
Barton Annex	Boiler Plant	Lochinvar	CREST FBN2001 (Series 110)	3	NG	Yes	Boiler Room [ID]	
Lugar Tower	Boiler Plant	Fulton	Pulse PAK Hydronic PHW–2000	5	NG	High-eff.	Boiler Room [ID]	Rebuild kits required

A 2. Boiler Log Sheet

Site Information

- Site Name: _____
- Address: _____
- Date: _____

Boiler Unit Information

Equipment Type: _____

Tag Number: _____

Manufacturer: _____

Model:

- Serial Number: _____
- Input (BTU/MBH): _____
- Year Installed: _____
- Firmware Version: _____
- Controls: _____

Attachment B: Service Checklist & Report Template

Contractor shall complete this checklist **per unit** and submit with photos and combustion reports. Attach additional sheets as needed.

B1. Header

Site/Building: Equipment Tag: _____
 Manufacturer/Model: _____ Serial No.: _____
 Date: _____ Start Time: _____ Finish Time: _____
 Lead Tech: _____ Helper: _____

B2. Safety & Pre-Checks

1. LOTO applied / permits (hot work if any) ☐ Yes ☐ No
2. Gas leak check (connections, valve trains) ☐ Pass ☐ Deficiency (describe)
3. Venting clearances/condensate routing verified ☐ Yes
4. Water quality, system pressure, air elimination, expansion tank charge checked ☐ Yes

B3. Rebuild Kit – Installed Components (attach packing slip; list PNs/lot#)

- Gaskets/seals ☐
- Igniter/electrode(s) ☐
- Flame sensor ☐
- Filters/strainers ☐
- Sight glass seals ☐
- O-rings ☐
- Other: _____

B4. Cleaning & Internal Inspection

- Heat exchanger opened/cleaned ☐
- Burner surface inspected ☐
- Condensate trap cleaned ☐
- Flue passageways brushed ☐
- Corrosion/leaks noted: _____

B5. Sensors & Safeties

- Temp/flow/pressure sensors verified ☐ Interlocks/BMS points verified ☐
- Flame safeguard test ☐ Gas train proved ☐
- HLP/LWP/HLT tested ☐

B6. Firmware/Parameters (with owner approval)

- Firmware rev(s): _____ Updated? ☐ Yes ☐ No
- Parameters documented/backed up _____ ☐ Yes ☐ No

• **B7. Combustion Analysis (record at low/mid/high fire)**

Firing Rate	O ₂ (%)	CO (ppm, AF)	CO ₂ (%)	Stack Temp (°F)	Excess Air (%)	Notes
Low						
Mid						
High						

B8. Controls/Panel (AERCO BMK only, if replaced)

- New panel installed ☐ PN: _____ Date: _____
- Commissioning steps completed ☐ _____
- Alarms cleared ☐ _____

B9. Cooling Tower (if part of this visit)

- Belt inspected/tensioned ☐
- Belt condition: _____
- Bearing grease points serviced ☐
- Accessible cleaning completed = Accessible cleaning completed = Accessible cleaning completed = Accessible cleaning completed = Accessible cleaning completed = Accessible cleaning completed = Accessible cleaning completed = Accessible cleaning completed = Accessible cleaning completed = Accessible cleaning completed
- Photos attached ☐

B10. Deficiencies & Recommendations

- Items requiring follow-up/unit price use: _____

B11. Labor/Materials Summary

- Lead hrs: _____ Helper hrs: _____
- Parts list (attach) Freight: _____ Consumables: _____

B12. Photo Log (before/after)

- Photo filenames/numbers: _____

B13. Sign-Off

- Technician Signature/Date: _____
- IHA Representative/Date: _____

Attachment C: Insurance & Endorsement Requirements

Provide certificates prior to NTP and maintain them through Substantial Completion and two (2) years of completed operations.

Minimum Coverages

- Commercial General Liability (CGL): \$1,000,000 per occurrence / \$2,000,000 aggregate (includes products/completed operations, contractual liability).
- Automobile Liability: \$1,000,000 combined single limit (any auto or scheduled + hired/non-owned).
- Workers' Compensation: Statutory; Employers' Liability \$500,000 each accident/disease.
- Umbrella/Excess Liability: \$2,000,000 following form over CGL/Auto/EL.
- Contractors Pollution Liability (if chemicals/descaling used): \$1,000,000 per claim/aggregate (project-specific or firm-wide).

Required Endorsements & Conditions

1. Additional Insured: IHA, its officers, officials, and employees on a primary & non-contributory basis for Ongoing and Completed Operations (forms CG 20 10 and CG 20 37 or equivalents).
2. Primary & Non-Contributory endorsement stating Contractor's coverage is primary to and non-contributory with IHA's insurance.
3. Waiver of Subrogation in favor of IHA on CGL, Auto, and WC (e.g., CG 24 04 or equivalent; WC waiver endorsement).
4. Notice of Cancellation: 30 days (10 days for non-payment) to IHA.
5. Per-Project Aggregate on CGL or separate project policy aggregate.
6. Subcontractors: Must carry coverages and endorsements equal to Contractor; Contractor to obtain and maintain subs' COIs.
7. Hot Work/Fire Safety (if applicable): Comply with NFPA 51B; provide hot work permits and fire watch.
8. Certificates: Name Indianapolis Housing Agency (IHA) as certificate holder; list project name/number; attach all endorsements.

By submitting this RFP, the Contractor certifies it possesses the requisite expertise, licenses, and qualifications necessary to perform and fulfill all requirements set forth herein.

Company Name: _____

Address _____

City _____ State _____ Zip Code _____

Name of Person Preparing RFP _____

Office Telephone Number _____ Mobile Telephone Number _____

Website address _____

Proposal Submission Requirements

All proposals in response to this Request for Proposal (RFP) shall be submitted no later than **3:00 p.m., Wednesday, October 15, 2025**. Submissions received after this deadline shall be deemed non-responsive and will not be considered.

Each proposal shall be clearly marked "RFP No. 092425" and submitted in a sealed package or envelope containing the following:

- One (1) printed original of the proposal, clearly marked "Original";
- Three (3) printed copies; and
- One (1) electronic copy (on USB drive or other approved media).

All proposals shall be addressed and delivered to:

Jacquelyne Brown, Procurement Manager – 2nd Floor
Indianapolis Housing Agency
1919 N. Meridian Street
Indianapolis, IN 46202-1303
*Re: Request for Proposal No. 092425
Service & Repair (6) Six Boilers*