

REQUEST FOR QUALIFICATIONS (RFQ)

Building Automation System (BAS) Service Contractor

Advanced Programming, Optimization, and Owner-Directed Services

Johnston County Public Schools (JCPS), herein after referred to as “Owner,” is soliciting **Statements of Qualifications** from companies experienced in providing **Building Automation System (BAS) services**.

INSTRUCTIONS

Interested firms shall submit a Statement of Qualifications and supporting documentation **electronically** to **Josh Woodard**, Facility Design and Construction Department, Johnston County Public Schools, by **10:00 AM on April 2nd**. Submissions received after this time will not be considered.

PURPOSE AND EXPECTATION

JCPS is soliciting Statements of Qualifications from **Building Automation System (BAS) service contractors** to provide **owner-directed BAS services** across multiple schools and projects.

Summary

The selected contractor will:

- Serve as a qualified BAS service provider under the direction of Owner.
- Perform BAS work, including but not limited to programming modifications, graphical updates, controller replacement, system optimization, and troubleshooting.
- Support Owner through technical coordination, documentation, and system performance improvements.

This RFQ is intended to identify contractors with the technical depth, staffing capability, and wide BAS expertise necessary to execute complex BAS services beyond routine maintenance or time-and-materials service calls.

Contractor Role And Independence

The selected contractor shall:

- Be **directly contracted to Owner**.
- Act in the best interest of Owner when performing BAS services.
- Disclose any **manufacturer affiliations, distributorships, or platform limitations** which may result in substandard service, real or perceived.

This procurement does **not** preclude contractors from representing specific BAS manufacturers; however, demonstrated ability to **work within existing systems and standards** will be evaluated as part of qualifications.

Anticipated Services

The selected BAS service contractor may be assigned work including, but not limited to:

- **Traditional BAS Contractor Services**
 - Programming changes and enhancements
 - Graphics creation and modification; system interface updates
 - Controller replacement and expansion
 - Database cleanup, point mapping, and trend configuration
 - Alarm management and system standardization
 - Field verification and functional testing
- **Owner-Directed Technical Services**
 - Participation in submittal and sequence reviews as directed by Owner
 - Identification of programming deficiencies or operational inefficiencies
 - Implementation of Owner-approved system improvements
 - Documentation of changes, deficiencies, and corrective actions
 - Support of system optimization initiatives
 - Integration of third-party tools and services

MINIMUM QUALIFICATIONS

To be considered, respondents must meet the following minimum requirements. Qualifications may be requested from Contractor prior to selection. Documentation will be provided for all items below and in an orderly format for review by Owner. Owner reserves the right to contact references, visit installations, and verify certifications and staffing. Owner reserves the right to not allow Contractors to submit, or reject the Contractor's Statements of Qualifications, if they do not meet the qualifications or provide them in a timely manner.

- Contractor shall demonstrate a minimum of five consecutive years of experience in the design, installation, programming, and commissioning of the BAS platform and product line proposed for this Project.
- Contractor shall have a minimum of five Successful Projects on-going or completed within the last five years where the Contractor has performed the Anticipated Services on facilities similar to the Owner's building types and complexity.
- Contractor shall maintain a fully staffed local office within fifty (50) miles of the Owner, with permanent, full-time employees capable of performing BAS programming, checkout, commissioning, and service.
- Contractor shall be a Certified Tridium Systems Integrator.
- Contractor shall have a minimum of seven, Niagara Technical Certification Program (TCP) certified personnel. All required certifications shall be held by direct employees of the Contractor in the local office and shall remain available for the Anticipated Services for its duration. Certifications held by subcontractors, consultants, or temporary personnel shall not be accepted.
- Contractor shall have a minimum of seven personnel who are certified in the product line(s) of controls to be installed as part of this project, with the same requirements as above.
- Contractor shall maintain an in-house BAS service department capable of providing routine maintenance and emergency support. Contractor shall demonstrate the ability to respond to service requests within twenty-four (24) hours and shall identify local service personnel assigned to the Anticipated Services.
- BAS programming, graphics development, database creation, and system commissioning shall be performed by the Contractor's direct employees. Subcontracting of these functions is not permitted.
- Contractor shall have demonstrated ability to support **multiple concurrent projects and occupied facilities**.
- Contractor shall have proficiency to track work, open and close requests/work orders in a timely and effective manner, all while maintaining a transparent work-order system.

SELECTION CRITERIA

Statements of Qualifications will be evaluated using the criteria below.

1. BAS Expertise and Past Performance (35%)

- Experience delivering advanced BAS services for institutional or K-12 clients.
- Demonstrated expertise directly relevant to Owner's facilities, in accordance with the Anticipated Services.
- Examples of system optimization or corrective programming efforts.

2. Proposed BAS Team and Technical Depth (35%)

- Qualifications and experience of assigned programmers and technicians, including:
 - Controls programming
 - Field commissioning
 - Troubleshooting operational BAS issues
- Proven and documented ability to work on one or more existing system types, including but not limited to Tridium Distech, Tridium Honeywell, Tridium Schneider, Tridium Johnson Facility Explorer (FX), Tridium ABB, and/or Schneider StruxureWare, at the supervisor (i.e., Tridium Supervisor), building (i.e., JACE), and controller/device (multiple brands) levels.
- Capabilities and skillsets for system interoperability.
- Current workload, depth of bench, and ability to support and organize **multiple concurrent service requests**.

3. Effective Project Management and Documentation (25%)

- Quality of documentation.
- Change management and version control practices:
 - Clear documentation of all BAS changes.
 - Maintenance of system backups prior to modifications.
 - Compliance with Owner BAS standards and conventions.
 - Coordination with Owner-designated technical representatives.
- Communication with Owner, such as use of standardized tools, logs, or reporting formats.

4. Proximity and Local Familiarity (5%)

- Location of the office and identified personnel proposed.
- Familiarity with **Johnston County codes, standards, and practices**.

FORMAT OF RESPONSE

Respondents should craft their Statement of Qualifications to assist with the evaluation criteria above. Submissions shall be limited to **ten (10) pages**, excluding attachments.

1. Core Submission

- Include documentation and qualifications in support of the Selection Criteria, including but not limited to:
 - Project team
 - Documentation of similar projects/experience
 - Technical expertise
 - Requested disclosures

2. Anticipated Hourly Rates

- Provide the **fully-burdened** anticipated hourly rates for the following individuals in support of the Anticipated Services, along with the associated title most closely related to the roles below:
 - Senior BAS Programmer
 - BAS Programmer
 - Field Technician
 - Graphics / UI Specialist
 - Project Manager (non-billable unless approved)

Required Attachments (Not Included in Page Limit)

Provide **one (1) example from a relevant past project** for each of the following:

- BAS system performance review or functional verification summary.
- BAS issues log/open service requests and resolution tracking documentation.

Optional Attachments (Not Included in Page Limit)

- Applicable letters of recommendation or references and associated contact information.

IMPORTANT INFORMATION

- Qualifications shall be received electronically no later than **10:00 AM on April 2nd**
- Submissions shall be addressed to:
Josh Woodard, Facility Design and Construction Department
Johnston County Public Schools
joshuawoodard@johnston.k12.nc.us
Subject Line: BAS Service Contractor, RFQ Response, *Company Name*
- **Following selection**, Owner will negotiate scope and fees with the most qualified contractor(s). If negotiations are unsuccessful, Owner reserves the right to negotiate with the next most qualified contractor(s). Owner reserves the right to select no companies as part of this RFQ.
- Questions regarding this RFQ must be submitted electronically no later than **10:00 AM on April 2nd**. Responses will be distributed to all known respondents. Questions shall be addressed to:
Josh Woodard, Facility Design and Construction Department
Johnston County Public Schools
joshuawoodard@johnston.k12.nc.us
Subject Line: BAS Service Contractor, RFQ Questions, *Company Name*
- Owner reserves the right to reject any and all Statements of Qualifications, request clarifications, or request additional information as part of the RFQ process.

- Historically Underutilized Businesses (HUBs) are encouraged to participate.

CLARIFICATIONS

- The selected contractor is not prevented from bidding on other related work with Owner, nor is it given any priority for additional work. Services performed by the selected contractor shall be distinctly separate from traditional construction projects. Projects awarded separately to the selected contractor will be thoroughly commissioned and inspected; errors and corrections as part of those projects shall not be performed via this RFQ.
- The RFQ is for services only; parts, equipment, and any other item(s) will be procured through alternate means and provided to the selected company, where required.
- Work under this contract will be performed on an Owner-directed basis. Owner may issue:
 - Task authorizations
 - Not-to-exceed work orders
 - Directed scopes tied to specific facilities, systems, or deficiencies

The contractor shall not proceed with additional work outside the authorized scope without written approval from Owner. This contract is not intended to function as an open-ended service agreement.