

[COMPANY LOGO]

[FACILITY NAME]

REQUEST FOR PROPOSAL  
MASTER SYSTEMS INTEGRATION (MSI) FOR  
HVAC AND BUILDING AUTOMATION SYSTEM (BAS)

[PROJECT NAME]

[PROJECT NUMBER]

**[Company Name]**

**[Address]**

**[City, State, Zip Code]**

**[Phone Number]**

**[Email Address]**

**[Date]**

**To: [Prospective Bidders/Integrators]**

Subject: Request for Proposal (RFP) – Master Systems Integration (MSI) for HVAC and Building Automation Systems (BAS) Services

## **1. Introduction**

**[COMPANY NAME]** hereinafter referred to as “the Company”, is seeking qualified and experienced Master Systems Integration service providers with expertise in HVAC, Building Automation Systems, and Operational Technology Networking to assist in the integration of these systems within our organization. We invite proposals from interested vendors to provide these specialized services in accordance with the requirements outlined in this RFP.

**[COMPANY NAME]** delivers a full range of **[SERVICES PROVIDED]**. Our workforce is comprised of a diverse and robust group of individuals ranging from full-time to part-time employees **[TEAM INFORMATION]**. Our team is committed to **[MISSION STATEMENT]**

## **2. Project Overview**

2.1 Project Description: The Company is planning a comprehensive integration initiative to optimize the control and management of our HVAC and Building Automation Systems. The goal is to create a seamless, consistent, and energy-efficient environment that ensures safety, comfort, and sustainability within our buildings.

### **2.1.1 [LIST FACILITY NAMES]**

2.2 Scope of Work: The selected Master Systems Integrator will be responsible for:

- Conducting a thorough assessment and inventory of our existing HVAC and Building Automation Systems, to include:
  - Documenting all network information and IP addresses for all existing network devices (HVAC, BAS, and Metering)
  - Provide enhanced Asset Data (HVAC, BAS, and Metering) for the Company’s Maintenance Management System and Enterprise Asset Management (EAM) System
  - **[LIST EXISTING SYSTEMS]**

- Create and maintain all BAS and OT Networking Specifications, the typical specs would be as follows:
  - Section 230923 – Instrumentation and Control for HVAC
  - Section 250000 – Integrated Automation and HVAC Temperature Control
  - Section 250800 – Commissioning of Integrated Automation
- Develop a detailed integration plan, including an existing gap analysis, with critical timelines and milestones for optimizing system performance
- Provide an on-going OT Network overview of what is currently in place at each site, where the gaps are, the risks associated, and the potential integration projects that should be performed
- Provide a Utility Metering Hardware & Network inspection, review, and reporting to document the reliability of the data being gathered by each existing utility meter
- Implementing the integration plan, ensuring seamless communication and control between all HAVC and BAS components
- Single-Point of contact for the Company on all integration work (HVAC, BAS, and Metering)
- Develop and maintain the BAS Graphic Standards and Sequence of Operation (SOO) Standards
- Provide Systems Integration drawings on each project to coordinate the equipment/systems being installed with the proper method of integration and control
  - This includes creating and maintaining proper point naming standards for proper control and seamless integration
- Specify and select all BAS and OT Networking equipment
- Review all BAS contractor install and programming scopes/proposals for proper alignment with the design intent and project goals
- Conduct rigorous testing and quality assurance to guarantee the reliability and functionality of integrated systems
- Provide training to our internal staff on the use and maintenance of the integrated HVAC, BAS, and OT Network systems
- Provide ongoing support and maintenance, including remote monitoring and system updates
- **[LIST ADDITIONAL SPECIFIC INSTRUCTIONS]**

**3. Proposal Submission Guidelines**

3.1 Deadline for Submission: All proposal must be submitted electronically to **[CONTACT EMAIL ADDRESS]** no later than **[SUBMISSION DEADLINE]** at **[TIME/EST]**. Late proposals will not be considered.

3.2 Key RFP Dates

RFP Issued	Month Date, Year	Time (EST)
Deadline for Submitted Questions	Month Date, Year	Time (EST)
Proposal Question Responses Emailed	Month Date, Year	Time (EST)
<b>Proposal Due Date</b>	<b>Month Date, Year</b>	<b>Time (EST)</b>

Virtual Interviews	Month Date, Year	Time (EST)
Final Selection	Month Date, Year	Time (EST)
Target Award Date	Month Date, Year	Time (EST)
Anticipated Contract Completion	Month Date, Year	Time (EST)

*\*We reserve the right to deviate from this schedule.*

3.3 Proposal Format: Please format your proposal in accordance with the following guidelines:

- **Cover Letter:** A brief introduction to your Company and its qualifications. Provide a brief summary that describes and highlights the firm’s BAS MSI experience, qualifications, and particular expertise for this engagement. Include present ownership and key management individuals. Where sub-consultants are proposed, provide information and allow for appropriate evaluation of their history. Include other pertinent information that supports your proposal
- **Executive Summary:** A high-level overview of your proposed HVAC and BAS integration solution
- **Organization Chart:** Provide a project-specific organizational chart for your team. Indicate names of proposed staff and their proposed duties and responsibilities for this project.
- **Project Team Resumes:** Provide a resume for each proposed team member, specifically stating tenure with the firm, experience, and qualifications. Resumes should be no longer than one page in length and should specifically address expertise in BAS MSI projects and experience on projects of similar size and capacity.
- **Project Profiles and References:** Provide project profiles for a maximum of five (5) similar type of projects. Project profiles are to have been completed in the past five (5) years.
- **Fee Proposal:** A breakdown of all costs associated with the project, including equipment, labor, and ongoing support. Include anticipated reimbursable expenses.
- **References:** Contact information for at least Three (3) services for whom you have provided similar Master Systems Integration services
- **Add Services:** Identify any additional services you feel may be required to complete the proposed scope of work, but not requested in this RFP.
- **Page Limit:** The length should be limited to ## single-sided pages, excluding individual team resumes.

**4. Evaluation Criteria**

The evaluation of proposals and selection of successful proposal will be based on the information provided by the Firm, including without limitation responses to the Firm’s qualifications. Consideration may also be given to any additional information helpful to the Company. We are not bound to accept the lowest priced proposal if it’s not the most advantageous to the project as determined solely by the Company.

Completeness of Proposal: Any proposal that does not contain each element described in this RFP, fully completed, initialed, or executed, as appropriate, may be considered incomplete and not considered further.

Proposals will be evaluated based on the following criteria:

- Proposal completeness and compliance with steps and procedures utilized in the completion and submission of the proposal
- Qualifications and relevant experience and expertise in HVAC and BAS Master Systems Integration
- Technical approach and methodology specific to HVAC, BAS, and OT Network systems
- Cost-effectiveness and value for money, including a Return on Investment (ROI) analysis
- References and Company testimonials related to Master Systems Integration services
- Oral presentation/demonstration (if requested)
  - Presentations will be judged based on clarity of presentation, ability to answer technical questions, and demonstrated understanding of the project.
- Other information deemed relevant by the Company.

## 5. Selection Process

The Company intends to award this contract to the Firm submitting the best overall proposal based on an evaluation of all qualified proposal responses. Enhancements to the minimum requirements will be considered. The Firm bears sole responsibility for the items included or not included in the response submitted. Exceptions to the terms and specifications contained within this request may result in disqualification.

Quality of service, pricing, products, acceptance of Company's Contract Requirements, Supplier Diversity and other terms of purchase will be an integral part of the decision selection process.

The evaluation criteria to be used includes the following:

- The experience and qualifications of the proposed team members, including any subcontracted firms (key attribute: expertise);
- Approach to the delivery of the program (key attributes: expertise, innovation, communication, and leadership);
- Demonstration of successfully working with and meeting the needs of authorities having jurisdiction (key attributes: expertise);
- References for similar engagements for the team leader; for the prime and subcontractors (key attribute: all);
- Ability to establish a successful working relationship with the established project team members and other stakeholders (key attributes: all);
- Supplier diversity percentage of fee proposal;
- Competitive Professional services fee.

The selection process will involve the following stages:

- Proposal submission and evaluation
- Short-listing of qualified vendors
- Interviews and presentations
- Final selection and contract negotiation

Interviews may be held for the short-listed firms, at the Company's discretion. Key team personnel must attend and contribute at the interview. Interview details will be forwarded to the short-listed firms.

It is the Firm's responsibility to verify any information and obtain any clarifications prior to submitting the response. The Company is not liable for any errors or misinterpretations made by the Firm in response to this solicitation.

## **6. Submission Requirements**

All bid responses, proposals, and communications required during the RFP process must be directed to:

- **[Contact Name]**
- **[Contact Title]**
- **[Contact Phone Number]**
- **[Contact Email Address]**

**All responses received are deemed confidential in nature and should be submitted [ONLINE/EMAIL/OTHER] only. Failure to adhere to these requirements may result in the Firm not being considered.**

## **7. Confidentiality**

All information provided in response to this RFP is considered confidential and should not be disclosed to third parties without the Company's written consent.

We appreciate your interest in partnering with us for this important initiative focused on HVAC MSI and BAS integration. We look forward to receiving your proposal and potentially working together to enhance our building systems' efficiency and performance.