

Notice of Intent to Certify Sole Source

To: Interested Parties

From: Craig P. Orgeron, CPM, Ph.D.

CC: ITS Project Number 49552

Date: August 4, 2026

Re: Sole Source Certification Number 5010 to provide Metasys server and network automation engine modernizations for the University of Mississippi (UM)

Contact Name: Jake Alexander

Contact Phone Number: 601-432-8090

Contact E-mail Address: Jake.Alexander@its.ms.gov

Sole Source Certification Award Details

Regarding Information Technology Services (ITS) Sole Source Certification Number 5010 for the University of Mississippi (UM), please be advised that ITS intends to award Johnson Controls, Inc., as the sole source provider of Metasys server and network automation engine modernizations in an amount not to exceed \$327,005.00 for a three-year period. Please be advised that ITS will determine if additional licenses, enhancements, upgrades, support, equipment are within scope during the certification period and may increase the spending authority accordingly. Should Johnson Controls, Inc. change their name during this certification period, then ITS will determine if a recertification is necessary. For an explanation regarding Mississippi state law, policy and procedures for sole source procurements, refer to Attachment B: Sole Source Procurement Overview.

Sole Source Criteria

1. The product or services being purchased must perform a function for which no other product or source of services exist:

The Johnson Controls Metasys servers, software, and hardware are currently used to monitor and maintain building access with the existing Metasys equipment across 13 buildings, including HVAC and lighting controls as well as communication with field devices on UM's campus. The software and hardware are in need of upgrades to the latest versions and/or replacement, and the Metasys software is proprietary to Johnson Controls, Inc.

2. The purchaser must be able to show specific business objectives that can be met only through the unique product or services:

The proposed Metasys hardware and software modernization for the Metasys ADX server and Network Automation Engines (NAE) involves proprietary software developed by Johnson Controls, Inc. UM's current infrastructure is aging and obsolete, and the software version will be discontinued if these upgrades are not completed. Hardware and software controls the HVAC and lighting across 13 buildings as well as communicates with field devices.

3. The product or services must be available only from the manufacturer and not through resellers who could submit competitive pricing for the product or services:

Johnson Controls Memphis Branch office is the factory branch of Johnson Controls, Inc for the local area including Oxford, Mississippi and the University of Mississippi in Oxford. All proposed hardware, software, software maintenance, and labor to update the system are available only through the local factory branch office and cannot legally be purchased from any other organization or entity. The Vendor's sole source certification letter is included as Attachment A

Schedule

Task	Date
First Advertisement Date	08/04/26
Second Advertisement Date	08/11/26
Response Deadline From Objectors	08/18/26 at 3:00 P.M. Central Time
Notice of Award/No Award Posted	Not before 08/19/26

Project Details

The current Metasys platform the UM Department of Student Housing uses for building controls was included in previous building remodels and new construction and now has aging infrastructure that will eventually be discontinued if upgrades are not completed. This upgrade to building controls software and hardware includes new server infrastructure, software, and building controllers.

Submission Instructions and Format of Response from Objecting Parties

Interested parties who have reason to believe that the Metasys server and network automation engine modernizations for the University of Mississippi (UM) should not be certified as a sole source should provide information in the following format for the state to use in determining whether or not to proceed with awarding the Sole Source contract to Johnson Controls, Inc.

1.1 Interested Party Information

1.1.1 Contact Name, Phone Number and email address

1.1.2 Company Website URL, if applicable

1.2 Objection to Sole Source Certification

1.2.1 Interested parties must present specific objections to the Sole Source certification using the criteria listed above.

1.2.2 A statement regarding the Interested Party's capabilities as related to this Sole Source Certification Request.

1.3 Comments will be accepted at any time prior to Tuesday, August 18, 2026, at 3:00 p.m. (Central Time) to Jake Alexander at Jake.Alexander@its.ms.gov or at the Mississippi Department of Information Technology Services, 3771 Eastwood Drive, Jackson, Mississippi 39211. Responses may be delivered by hand, via regular mail, overnight delivery, e-mail or by fax. Fax number is (601) 713-6380. ITS WILL NOT BE RESPONSIBLE FOR DELAYS IN THE DELIVERY OF RESPONSES. It is solely the responsibility of the Interested Parties that responses reach ITS on time. Interested Parties may contact Jake Alexander to verify the receipt of their Responses. Responses received after the deadline will be rejected.

1.4 Interested Party responses should include the following information:

SUBMITTED IN RESPONSE TO Sole Source Certification No. 5010-49552 Accepted until August 18, 2026 @ 3:00 p.m., ATTENTION: Jake Alexander
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If you have any questions concerning the information above or if we can be of further assistance, please contact Jake Alexander at 601-432-8090 or via email at Jake.Alexander@its.ms.gov.

Attachment A: Vendor Correspondence

Attachment B: Sole Source Procurement Overview



Johnson Controls, Inc.
Memphis Systems
6935 Appling Farms Parkway
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Memphis, TN 38133
Phone: 901-383-5757
Fax: 901-383-5758

Cory Holmes
Johnson Controls, Inc.
6935 Appling Farms Parkway
Suite 112
Memphis, TN 38133

07/15/26

Tripp Sanders, PhD.
Manager of IT Services - Student Housing
The University of Mississippi
P.O. Box 1848
B26 Minor Hall
University, MS 38677-1848

Dear Tripp,

Please reference JCI proposal for UM Housing: Server and Supervisory Controller Modernization. The proposed Metasys hardware and software modernization for the Metasys ADX server and Network Automation Engines (NAE) as well as the proposed Metasys software maintenance for Ole Miss involve proprietary software developed by Johnson Controls, Inc. Johnson Controls Memphis Branch office is the factory branch of Johnson Controls, Inc for the local area including Oxford, MS and the University of Mississippi in Oxford. All proposed hardware, software, software maintenance, and labor to update the system are available only through the local factory branch office and cannot legally be purchased from any other organization or entity.

Please review and advise if you have additional questions. Thank you.

Regards,

Cory Holmes

Cory Holmes
Smart Buildings Account Executive

Attachment B

The acquisition of information technology for all state agencies and institutions of higher learning (IHLs) is within the scope of the ITS law, found in Mississippi Code Section 25-53-1, et seq., and the policies and procedures established in accordance with this statute, found in the ITS Procurement Handbook posted on the ITS website (www.its.ms.gov).

ITS enabling legislation requires that information technology hardware, software and services be acquired in a manner that insures the maximum of competition among all manufacturers and suppliers of such equipment and services. Accordingly, ITS promotes full and open competition through the issuance of open specifications and the objective evaluation of Interested Party proposals to determine the lowest and best offering to meet an agency's or public university's business requirements. True competition protects the integrity and credibility of purchasing in the public sector and is essential in providing best value and adequate contractual protection for the purchasing entity. In certain limited situations, information technology acquisitions may be sole-sourced.

ITS utilizes the provisions of Public Purchasing Law for Sole Source and Emergency procurements of information technology. Mississippi Public Purchasing Law (Mississippi Code Section 31-7-13) specifies that noncompetitive items available from one source only be exempted from bid requirements (sole-sourced). ITS statute, in Section 25-53-5 (p), permits ITS to utilize provisions in Public Purchasing Law or regulations, when applicable.

Per Public Purchasing law, acquisitions must meet the following criteria to be authorized as sole source:

1. The product or services being purchased must perform a function for which no other product or source of services exists,
2. The purchaser must be able to show specific business objectives that can be met only through the unique product or services, AND
3. The product or services must be available only from the manufacturer and NOT through resellers who could submit competitive pricing for the product or services. The vendor's correspondence regarding this criterion for this project is included as Attachment A.

By policy as documented in the ITS Procurement Handbook, acquisitions of IT services must include the following information to be authorized as sole source:

1. An explanation about why the amount to be expended is reasonable, and
2. An explanation regarding the efforts by the purchaser to obtain the best possible price.

For state agencies, approval of all technology purchases with a lifecycle cost of \$5,000 or less, including sole source purchases, has been delegated to the agency. The ITS Procurement Limits Policies for Agencies (a section in the ITS Procurement Handbook) require a minimum of two competitive written bids or proposals for technology purchases with a lifecycle cost over \$5,000 but not over \$75,000 (not over \$25,000 for projects funded by the American Recovery and Reinvestment Act). Since, for single source items, the procuring agency will be unable to obtain two written bids, ITS must certify all sole source acquisitions of information technology with a lifecycle cost greater than \$5,000.

Institutions of Higher Learning (IHLs) or public universities have been delegated the authority to certify sole source procurements up to \$250,000 lifecycle cost under the ITS Procurement Limits Policies for IHLs (a section in the ITS Procurement Handbook). For the certification of sole source procurements delegated to the CIOs at public universities, the public university must follow ITS' Sole Source Procedure, including advertisement of the intent to award as sole source. Institutions certifying a sole source purchase must ensure the criteria listed above are met and documented in writing by the institution and the Interested Party prior to certifying a product or service as sole source. Sole source documentation must be reviewed and approved by the IHL's CIO for any sole-source certification above \$5,000. All sole source documentation should be retained in the public university's procurement file. Sole source requests above \$250,000 lifecycle cost require ITS approval.

Other than the delegations outlined above, all sole source technology procurements must be certified by ITS.

ITS thoroughly reviews Sole Source Certification Requests, determining if competing products and/or services exist. If so, ITS conducts a competitive procurement. If ITS' review confirms the sole source, then a Sole Source advertisement is issued, giving other Interested Parties an opportunity to identify competing products and/or services. Based upon the results of the Sole Source advertisement, ITS will either certify the request as a sole source or conduct a competitive procurement.