



COMMONWEALTH OF VIRGINIA  
STANDARD CONTRACT

Contract No. UCPJMU6175

This contract entered into this 5<sup>th</sup> day of November 2021, by Roofing Innovations, LLC hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:


SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.


PERIOD OF PERFORMANCE: From November 14, 2021 through November 13, 2022 with 4 one-year renewal options.

The contract documents shall consist of:

- (1) This signed form;
- (2) The following portions of the Request for Proposal MPM-1132 dated September 17, 2021:
  - (a) The Statement of Needs,
  - (b) The General Terms and Conditions,
  - (c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
- (3) The Contractor's Proposal dated October 12, 2021 and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
  - (a) Negotiations Summary, dated November 4, 2021.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:  
By:   
(Signature)  
Mark Bobb  
(Printed Name)  
Title: Chief Operating Officer

PURCHASING AGENCY:  
By:   
(Signature)  
Michael Morrison  
(Printed Name)  
Title: Buyer Senior

# ROOFING INNOVATIONS, LLC

11/4/2021

Rod Young  
Chief Executive Officer  
1-804-897-1444  
rod@roofinginnovation.com

The following Labor, Other Fees, and Discounts sections represent the negotiated pricing for all represented items and should be reflected in all quotes and proposals for the University. No other fees or charges shall be acceptable.

[illegible]

Other Fees/Charges
Charge Card Processing Fee: 0.00%

# James Madison University

Request for Proposal

**RFP# MPM-1132**

Roofing Inspection, Installation, Maintenance, & Replacement
--



**ATTN: HAYDEN YOUNG**

Roofing Innovations, LLC  
1607 Rhoadmiller St., Suite A  
Richmond, VA 23220

804-447-8426



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# 1 - COVER SHEET

## REQUEST FOR PROPOSAL

RFP# MPM-1132

Issue Date: September 17, 2021  
Title: Roofing Inspection, Installation, Maintenance, & Replacement  
Issuing Agency: Commonwealth of Virginia  
James Madison University  
Procurement Services MSC 5720  
752 Ott Street, Wine Price Building  
First Floor, Suite 1023  
Harrisonburg, VA 22807

Period of Contract: From Date of Award Through One Year (Renewable)

Sealed Proposals Will Be Received Until **2:00 PM on Tuesday October 19, 2021** for Furnishing The Services Described Herein.

**MANDATORY/ OPTIONAL PRE-PROPOSAL:** No pre-proposal meeting is required.

*SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.*

All Inquiries For Information And Clarification Should Be Directed To: Michael Morrison, Buyer Senior, Procurement Services, [morrismp@jmu.edu](mailto:morrismp@jmu.edu); 540-568-6181; (Fax) 540-568-7935 not later than five business days before the proposal closing date.

**NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.**

In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm:

Roofing Innovation, LLC

1607 Rhoadmiller St, Suite A

Richmond, VA 23220

By:



(Signature in Ink)

Name:

Mark Babb

(Please Print)

Date: 10/12/21

Title: Chief Operating Officer

Web Address: [www.roofinginnovation.com](http://www.roofinginnovation.com)

Phone: 804-447-8426

Email: [mark@roofinginnovation.com](mailto:mark@roofinginnovation.com)

Fax #: 804-447-8429

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 N/A #2 N/A #3 N/A #4 N/A #5 N/A (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:

X YES; ☐ NO; IF YES ☒ SMALL; ☐ WOMAN; ☐ MINORITY IF MINORITY: ☐ AA; ☐ HA; ☐ AsA; ☐ NW; ☐ Micro

Note: This public body does not discriminate against faith-based organizations in accordance with the Code of Virginia, § 2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

Rev. 1/12/21

## 2 - PLAN AND METHODOLOGY: IV. STATEMENT OF NEEDS

### APPROACH

*O. 1. a. Describe approach to providing roofing inspection, installation, maintenance, and replacement services to JMU for both large and small scale projects. Include your process, methodology, and work plans.*

### Roof Inspections:

Cost: \$2,000 per roof. If part of Budgeting and Planning Program, charged at \$70 per hour plus materials.

We utilize roof inspections as a proactive approach to maintaining and budgeting roof maintenance and repairs. The inspection serves as the basis for ranking roofs by likelihood of failure within the year and is based upon observed deficiencies and integrity of the roofing material.

The Process:

Evaluations are performed in groups to provide more meaningful budgeting material. For both low slope and steep slope we observe the following process:

1. Utilize software to identify areas of ponding water on roof areas
2. Discussion with owners about active leaks in the building
3. Roof Evaluation (with photos)
  - a. Condition of roofing surface (membrane, shingles, tiles, slate, etc...)
  - b. Condition of flashings
  - c. Condition of penetrations
  - d. Inspection of drains/scuppers
  - e. Identify standing water
  - f. Inspection of gutters and downspouts
4. Evaluation is captured in software
5. Evaluation is produced as a report and reviewed with customer
6. Evaluations are ranked by severity and urgency against their peers
7. Review the evaluations with the customer to allocate resources where they are needed most.

To illustrate this process, we have provided a roof report and its Budgeting Spreadsheet, which is the aggregation of many roof reports. This is provided to illustrate how the single reports provide detail on the repairs and then feed into a report to help identify which roofs need the most immediate attention.

The following examples are provided:

Exhibit 1: Inspection Report – William & Mary Monroe Hall

Exhibit 2: Inspection Report – West Marshall Street

Exhibit 3: Inspection Report – Bosco Building

Exhibit 4: Budget & Planning Program

Photo Report by Roofing Innovations

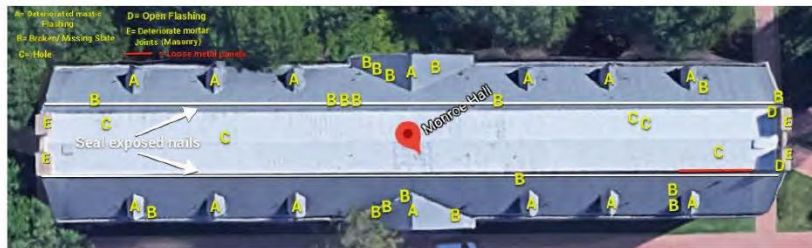
Created by Adam Fletcher

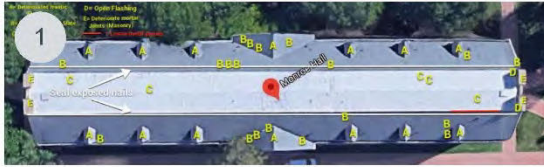
Mar 10, 2021 | 30 Photos



## 226 Richmond Road

Monroe Hall





Aerial view of roof showing all listed deficiencies.

Project: Monroe Hall  
Date: March 10th, 2021, 9:12 a.m.  
Creator: Adam Fletcher



Picture showing leaking interior.

Project: Monroe Hall  
Date: March 5th, 2021, 9:46 a.m.  
Creator: Duver Gonzalez



Picture showing small amount of water staining from attic.

Project: Monroe Hall  
Date: March 5th, 2021, 10:11 a.m.  
Creator: Duver Gonzalez



Picture take from attic interior showing hole in slate roof.

Project: Monroe Hall  
Date: March 5th, 2021, 10:31 a.m.  
Creator: Duver Gonzalez



Picture showing nail hole in metal roof.

Permanent repair: Install metal patch with butyl tape and fasten to roof over hole, Seal metal patch with seam sealer.

Project: Monroe Hall  
Date: March 5th, 2021, 11:49 a.m.  
Creator: Duver Gonzalez



Picture showing nail hole in metal roof.

Permanent repair: Install metal patch with butyl tape and fasten to roof over hole, Seal metal patch with seam sealer.

Project: Monroe Hall  
Date: March 5th, 2021, 11:47 a.m.  
Creator: Duver Gonzalez





Picture showing nail hole in metal roof.

Permanent repair: Install metal patch with butyl tape and fasten to roof over hole, Seal metal patch with seam sealer.

Project: Monroe Hall  
Date: March 5th, 2021, 10:22 a.m.  
Creator: Duver Gonzalez



Picture showing nail hole in metal roof.

Permanent repair: Install metal patch with butyl tape and fasten to roof over hole, Seal metal patch with seam sealer.

Project: Monroe Hall  
Date: March 5th, 2021, 11:47 a.m.  
Creator: Duver Gonzalez



Picture showing nail hole in metal roof.

Permanent repair: Install metal patch with butyl tape and fasten to roof over hole, Seal metal patch with seam sealer.

Project: Monroe Hall  
Date: March 5th, 2021, 12:14 p.m.  
Creator: Duver Gonzalez





Picture showing view of metal roof section.

Deteriorated coating on roof along with other deficiencies. Estimated life of roof 2-4 Years.

Project: Monroe Hall  
Date: March 5th, 2021, 11:44 a.m.  
Creator: Duver Gonzalez



Picture showing area where screws were added at eave of metal roof where metal panels were coming loose due to wind.

Project: Monroe Hall  
Date: March 5th, 2021, 2:00 p.m.  
Creator: Duver Gonzalez



Picture showing seam sealer applied to screws to prevent leaks.

Project: Monroe Hall  
Date: March 5th, 2021, 2:41 p.m.  
Creator: Duver Gonzalez



Picture showing open flashing around chimney.

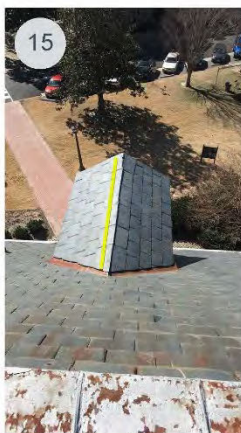
Permanent repair: Install seam sealer on open areas of flashing.

Project: Monroe Hall  
Date: March 5th, 2021, 11:45 a.m.  
Creator: Duver Gonzalez



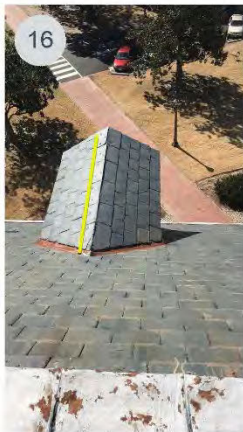
Picture showing area on dormer ridge where mastic flashing and reinforced fabric is needed.

Project: Monroe Hall  
Date: March 5th, 2021, 11:42 a.m.  
Creator: Duver Gonzalez



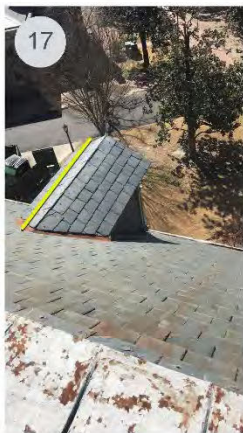
Picture showing area on dormer ridge where mastic flashing and reinforced fabric is needed.

Project: Monroe Hall  
Date: March 5th, 2021, 11:44 a.m.  
Creator: Duver Gonzalez



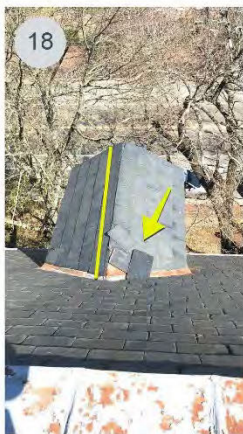
Picture showing area on dormer ridge where mastic flashing and reinforced fabric is needed.

Project: Monroe Hall  
Date: March 5th, 2021, 11:44 a.m.  
Creator: Duver Gonzalez



Picture showing area on dormer ridge where mastic flashing and reinforced fabric is needed.

Project: Monroe Hall  
Date: March 5th, 2021, 11:44 a.m.  
Creator: Duver Gonzalez



Picture showing area on dormer ridge where mastic flashing and reinforced fabric is needed.

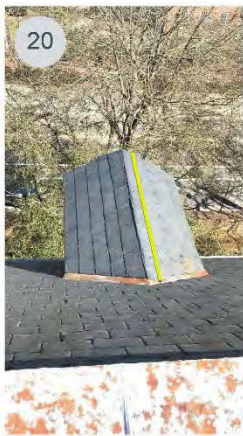
Picture also showing loose/ Missing slate on dormer.

Project: Monroe Hall  
Date: March 5th, 2021, 11:49 a.m.  
Creator: Duver Gonzalez



Picture showing area on dormer ridge where mastic flashing and reinforced fabric is needed.

Project: Monroe Hall  
Date: March 5th, 2021, 11:49 a.m.  
Creator: Duver Gonzalez



Picture showing area on dormer ridge where mastic flashing and reinforced fabric is needed.

Project: Monroe Hall  
Date: March 5th, 2021, 11:49 a.m.  
Creator: Duver Gonzalez

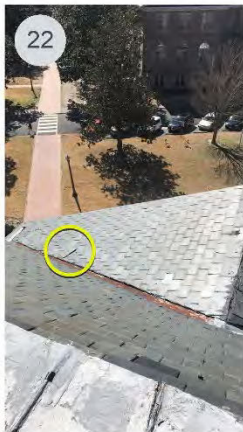


Picture showing loose slate on dormer.

Permanent repair: Install missing slate shingles/ Refasten any loose slate.

Project: Monroe Hall  
Date: March 5th, 2021, 11:43 a.m.  
Creator: Duver Gonzalez

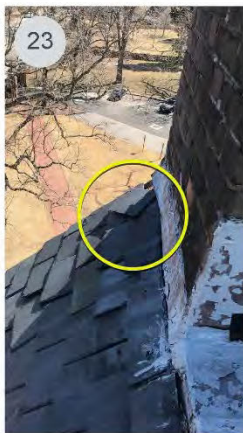




Picture showing loose slate on dormer.

Permanent repair: Install missing slate shingles/ Refasten any loose slate.

Project: Monroe Hall  
Date: March 5th, 2021, 11:44 a.m.  
Creator: Duver Gonzalez



Picture showing loose slate at headwall of chimney.

Permanent repair: Install missing slate shingles/ Refasten an loose slate.

Project: Monroe Hall  
Date: March 5th, 2021, 11:46 a.m.  
Creator: Duver Gonzalez



Picture showing loose slate near ridge of slate roof.

Permanent repair: Install missing slate shingles/ Refasten an loose slate.

Project: Monroe Hall  
Date: March 5th, 2021, 11:48 a.m.  
Creator: Duver Gonzalez



Picture showing loose slate near ridge of slate roof.

Permanent repair: Install missing slate shingles/ Refasten an loose slate.

Project: Monroe Hall  
Date: March 5th, 2021, 11:50 a.m.  
Creator: Duver Gonzalez



Picture showing area where sealant was applied to exposed nails and gaps on ridge of slate roof.

Project: Monroe Hall  
Date: March 5th, 2021, 1:53 p.m.  
Creator: Duver Gonzalez



Picture showing area where sealant was applied to exposed nails and gaps on ridge of slate roof.

Project: Monroe Hall  
Date: March 5th, 2021, 1:54 p.m.  
Creator: Duver Gonzalez

Exhibit 1: Inspection Report – William & Mary Monroe Hall (Continued)



Picture showing deteriorated mortar joints on chimney.

Permanent repair: Install mortar sealant where needed on deteriorated mortar joints.

Project: Monroe Hall  
Date: March 5th, 2021, 11:45 a.m.  
Creator: Duver Gonzalez



Picture showing deteriorated mortar joints on chimney.

Permanent repair: Install mortar sealant where needed on deteriorated mortar joints.

Project: Monroe Hall  
Date: March 5th, 2021, 11:46 a.m.  
Creator: Duver Gonzalez



Picture showing deteriorated mortar joints on chimney.

Permanent repair: Install mortar sealant where needed on deteriorated mortar joints.

Project: Monroe Hall  
Date: March 5th, 2021, 11:46 a.m.  
Creator: Duver Gonzalez

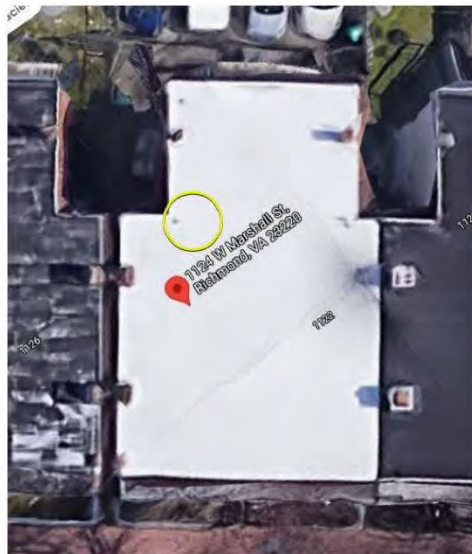
Photo Report by Roofing Innovations

Created by Adam Fletcher

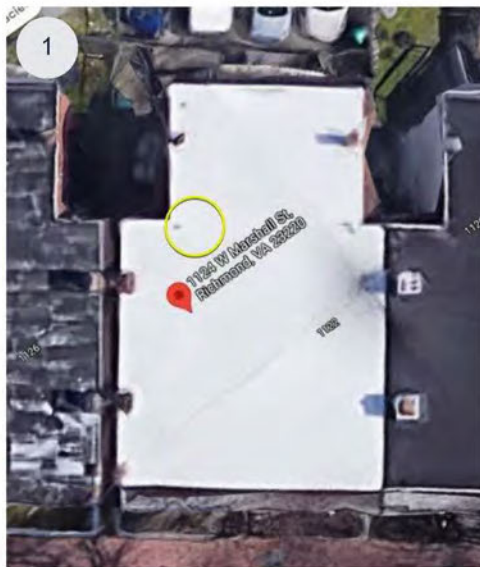
Jul 15, 2021 | 10 Photos



## 1124 West Marshall St.

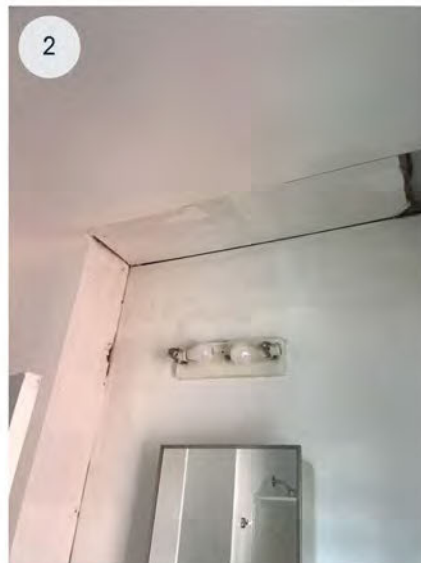






Aerial view of roof marked with leaking location.

Project: 1124 W Marshall St Date: July 14th, 2021, 9:26 a.m. Creator: Adam Fletcher



Picture showing leaking interior.

Project: 1124 W Marshall St Date: July 14th, 2021, 9:33 a.m. Creator: Duver Gonzalez



Picture showing open seam on TPO cover tape.

Permanent repair: Install new TPO cover tape on edge metal detail.

Project: 1124 W Marshall St Date: July 14th, 2021, 9:42 a.m. Creator: Duver Gonzalez



Picture showing open seam on TPO cover tape.

Permanent repair: Install new TPO cover tape on edge metal detail.

Project: 1124 W Marshall St Date: July 14th, 2021, 9:43 a.m. Creator: Duver Gonzalez



Picture showing open seam on TPO cover tape.

Permanent repair: Install new TPO cover tape on edge metal detail.

Project: 1124 W Marshall St Date: July 14th, 2021, 9:44 a.m. Creator: Duver Gonzalez



Picture showing deteriorated membrane in built in gutter, Open seams in cover tape and patches.

Permanent repair: Install TPO patch over deteriorated membrane, Install new TPO cover tape on edge metal detail.

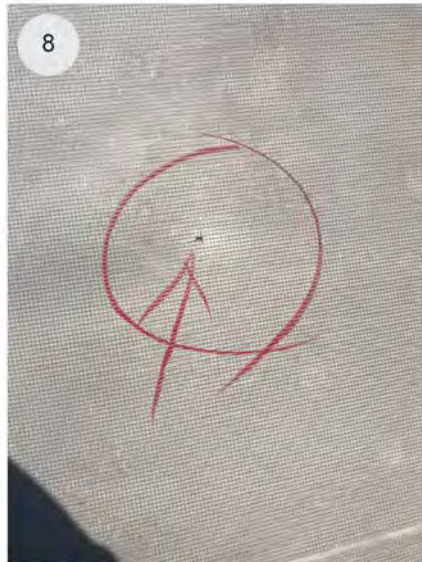
Project: 1124 W Marshall St    Date: July 14th, 2021, 9:45 a.m.    Creator: Duver Gonzalez



Picture showing deteriorated membrane in built in gutter, Open seams in cover tape and patches.

Permanent repair: Install TPO patch over deteriorated membrane, Install new TPO cover tape on edge metal detail.

Project: 1124 W Marshall St    Date: July 14th, 2021, 9:46 a.m.    Creator: Duver Gonzalez



Picture showing puncture hole in TPO membrane.

Permanent repair: Install TPO patch over puncture hole in membrane.

Project: 1124 W Marshall St Date: July 14th, 2021, 8:43 a.m. Creator: Duver Gonzalez

Adam Fletcher

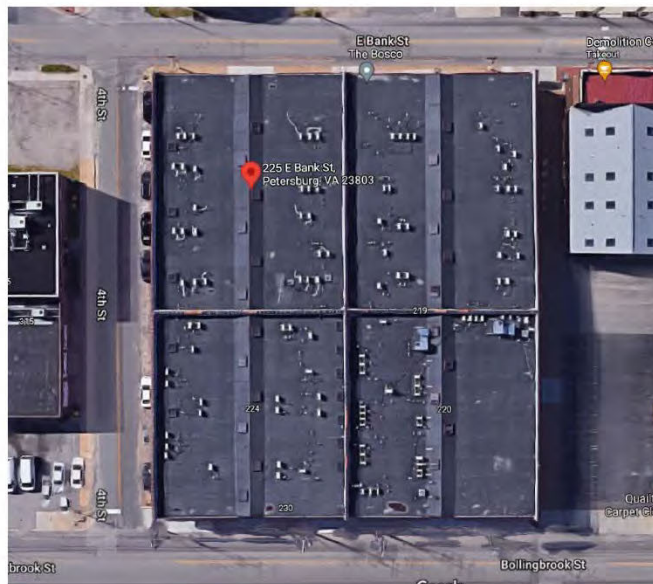
Roofing Innvovations

8/20/2021 | 19 Photos



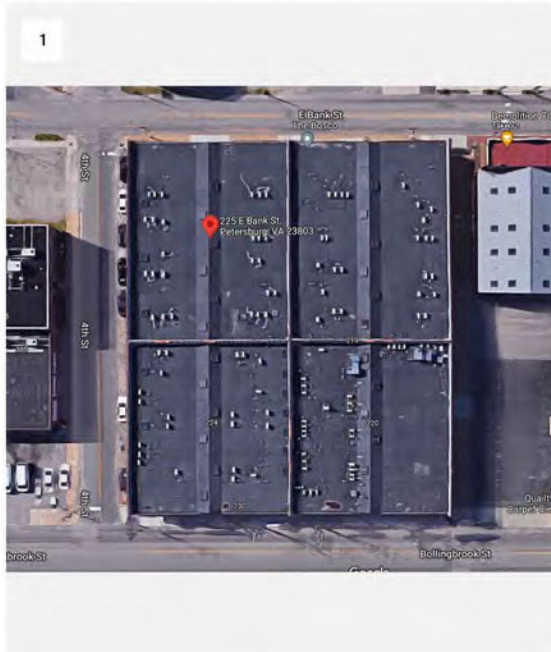
## 225 E Bank Rd.

Bosco Building



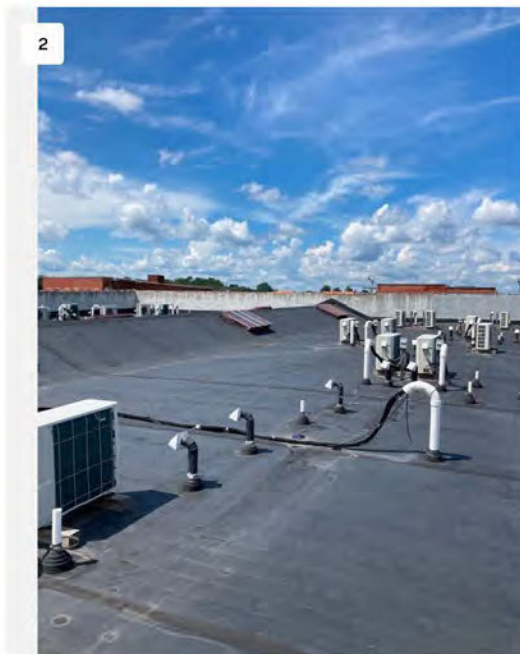


## Section 1



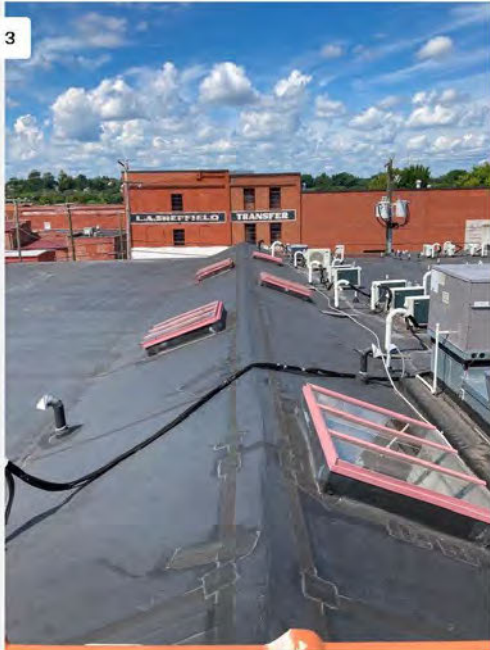
Picture showing aerial view of roof.

Project: Bosco  
Date: 8/20/2021, 1:38pm  
Creator: Adam Fletcher



Picture showing view of EPDM roof system.

Project: Bosco  
Date: 8/19/2021, 2:38pm  
Creator: Adam Fletcher



Picture showing view of EPDM roof system.

Project: Bosco  
Date: 8/19/2021, 2:40pm  
Creator: Adam Fletcher



Picture showing open seam on EPDM pipe boot.  
Permanent repair: Remove and replace EPDM pipe boot.

Project: Bosco  
Date: 8/19/2021, 2:40pm  
Creator: Adam Fletcher

5



Picture showing open seam on EPDM pipe boot.  
Permanent repair: Remove and replace EPDM pipe boot.

Project: Bosco  
Date: 8/19/2021, 2:41pm  
Creator: Adam Fletcher

6



Picture showing open seam on EPDM pipe boot.  
Permanent repair: Remove and replace EPDM pipe boot.

Project: Bosco  
Date: 8/19/2021, 2:41pm  
Creator: Adam Fletcher

7



Picture showing open seam on EPDM pipe boot.  
Permanent repair: Remove and replace EPDM pipe boot.

Project: Bosco  
Date: 8/19/2021, 2:53pm  
Creator: Adam Fletcher

8



Picture showing open seam on EPDM pipe boot.  
Permanent repair: Remove and replace EPDM pipe boot.

Project: Bosco  
Date: 8/19/2021, 2:55pm  
Creator: Adam Fletcher



9



Picture showing collapsed EPDM pipe boot.

Permanent repair: Remove and replace EPDM pipe boot.

Project: Bosco

Date: 8/19/2021, 3:00pm

Creator: Adam Fletcher

10



Picture showing collapsed EPDM pipe boot.

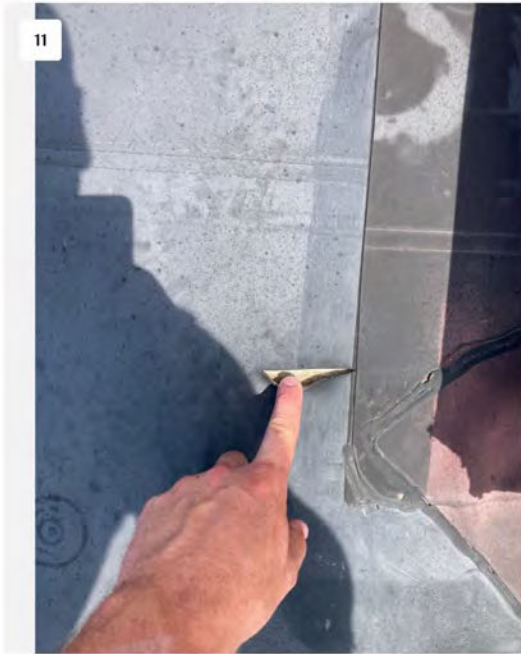
Permanent repair: Remove and replace EPDM pipe boot.

Project: Bosco

Date: 8/19/2021, 2:58pm

Creator: Adam Fletcher

11



Picture showing tear in EPDM membrane.

Permanent repair: Install new EPDM patch over defective area in membrane.

Project: Bosco

Date: 8/19/2021, 2:45pm

Creator: Adam Fletcher

12



Picture showing open seam in EPDM field membrane.

Permanent repair: Install EPDM patch over defective seam.

Project: Bosco

Date: 8/19/2021, 2:49pm

Creator: Adam Fletcher

13



Picture showing open seam in EPDM field membrane.  
Permanent repair: Install EPDM patch over defective seam.

Project: Bosco  
Date: 8/19/2021, 2:52pm  
Creator: Adam Fletcher

14



Picture showing puncture hole in EPDM flashing on high side of skylight.  
Permanent repair: Install EPDM patch over defective flashing.

Project: Bosco  
Date: 8/19/2021, 2:58pm  
Creator: Adam Fletcher





Picture showing tear in EPDM patch.

Permanent repair: Install new EPDM patch over defective EPDM patch.

Project: Bosco

Date: 8/19/2021, 2:59pm

Creator: Adam Fletcher



Picture showing open flashing on high side skylight.

Permanent repair: Install EPDM patch over defective flashing.

Project: Bosco

Date: 8/19/2021, 3:01pm

Creator: Adam Fletcher

17



Picture showing puncture holes in EPDM membrane.  
Permanent repair: Install new EPDM patch over defective membrane.

Project: Bosco  
Date: 8/19/2021, 2:39pm  
Creator: Adam Fletcher

18



Picture showing ponding water in gutter system.  
Permanent repair: Reslope gutters to have positive drainage. Or Install additional downspouts.

Project: Bosco  
Date: 8/19/2021, 2:42pm  
Creator: Adam Fletcher

Exhibit 3: Inspection Report – EPDM (Continued)

225 E Bank Rd.

8/20/2021

19



Picture showing damaged section of gutter.  
Permanent repair: Remove and replace damaged section of gutter.

Project: Bosco  
Date: 8/19/2021, 2:56pm  
Creator: Adam Fletcher

Section 1

12 / 12

Bosco



## BUDGET AND PLANNING PROGRAM

### THE PROGRAM

The Budget & Planning Program is designed to identify deficient areas in a roofing system and assist in the planning for future repairs. We provide an estimate of what repairs will be needed to extend the life of the asset for one more year. We then rank the repairs by way of severity so our clients can prioritize spending based on their budget, timeline and plans for the asset.

### INSPECTIONS & RANKING

Each roofing system is inspected for deficiencies. The deficiencies are photo documented with a proposal for permanent repairs. All inspected roofs are ranked against their peers with a HIGH, MEDIUM, or LOW severity rating.

### BUDGETING

The budgeting process is not part of our business, however, the summary of our inspections, reporting and ranking allow our customers to plan for repairs.

### PROGRAM COSTS

Roofing Innovations establishes a flat rate charge for the Budgeting and Planning Program. This charge is assessed for each Inspection and allows us to identify and investigate deficiencies and provide estimates for permanent repairs.

The "per roof" charge for the Budgeting & Planning Program is: \$\_\_\_\_\_

### PROGRAM APPROVAL

The following individual is authorized to approve the Budgeting & Planning Program and approves the "per roof" charge listed above. He/She also understands the program and authorizes payment for the work performed.

**Roofing Innovations**

**Client:** \_\_\_\_\_

Approved By: \_\_\_\_\_

Approved By: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

Roofing Innovations, LLC | 1607 Rhoadmiller St, Ste. A, Richmond, VA 23220  
Office: 804-447-8426 | URL: roofinginnovation.com  
Version: 8.2.21





## SUMMARY REPORT

Roofing Innovations, LLC

Summary Report

5/26/2021

KEY	Potential Risk	General Factors
	High	Water infiltration potential in 0-6 months. Heavy signs of deterioration, excessive open penetrations
	Medium	Water infiltration potential in 6-12 months. Open Penetrations (flashings, pipe boots, protrusions)
	Low	Water infiltration potential in 12+ months. Ponding water, improper installation, worn coating

Proposed Repairs are to EXTEND the life of the existing roof.

Potential	Address	Roof Type(s)	Estimated Life (years)	Deficiency Types (detail in Roof Report)	Projected Outcome	Cost
High		Metal roof	1-2 +/-	aluminum coating, rust throughout, flashing at penetrations and parapet wall, gutter system, punctures	Restore Roof to stop active leaks and prepare for Coating system. (coating system not quoted)	5,662
High		Modified Bitumen, Metal, Slate	Modified Bitumen: 1-2 Metal: 5-7	Aluminum coating, alligatoring on membrane, open seams, cracking, chimney mortar joints, edge metal, flashing, Feltrete fascia boards	Stop Active leaks until new roof is installed	8,777
High		Modified Bitumen	1-2 +/-	Heavy signs of cracking and deterioration roof hatch on interior rotten need of replacement, membrane defective around penetrations on roof	repair the known deficiencies to prevent future leaks	5,681
High		Modified Bitumen, Clay tile	Bitumen 2-4 +/- Clay tile 7-10 +/-	Showing signs of cracking and flashing improperly installed also open seams, broken clay tiles	Improve improper flashing on parapet wall to be one consistent membrane, repair broken clay tiles	7,003
High		Modified Bitumen, Metal overhang, Clay tile	Modified Bitumen: 2 Metal 1-2 Clay Tile 10+	Deficiencies and improper installation of pipe collar, flashing on parapet wall and deteriorated pitch pocket	Correcting improperly installed items that are deteriorating	23,212
High		Modified Bitumen, metal, shingle	Modified Bitumen 1-2 Metal <1 Shingle 10+	Heavy Signs of rust and wind damage on metal roof. Open seams and flashing issues on Modified Bitumen	Repair shingle roof section, replace Modified Bitumen Roof and metal Roof	76,090
Medium		Modified Bitumen	5-7 +/-	Pipe flashing, wall flashing, puncture holes, flashing at parapet walls, gutter systems	Extend life of roof system. Stop potential water entry points.	10,351
Medium		Modified Bitumen	2-4	Bitumen roof fair condition with improper installation noted. Flashing on parapet wall, replace cover strip on edge metal detail, flashing around skylight, flashing around pipe penetrations	Repair of noted items will have a positive impact on the estimated life of roof and keep moisture out preventing further repairs	5,619
Medium		Modified Bitumen, Slate	4-6 +/- 10 +/-	Minimum deficiencies observed for Bitumen though patches need to be made to open seams. Broken tiles	Patching penetrations and flashing around penetrations will allow proactive extension of roof's life	8,324
Medium		Modified Bitumen, Metal	2-4 +/- 1-2 +/-	<u>Wall and penetration on wall is loose, metal roof is in poor condition and needs replacing within 1-2 years</u> <u>Metal overhang good condition no repair noted</u>	Repairs to Bitumen roof will extend life and help to prevent damage to substrate, metal roof needs replacing	5,709
Medium		Metal overhang	5-7 +/-	Parapet wall heavy deteriorated mortar joints, loose gutter, overhang has exposed metal edge, various flashing repairs, replace skylight	By proactively repairing future damage can be avoided.	6,431
Medium		Modified Bitumen	2-4 +/-	Open seams in membrane, cracking around penetrations, open wall flashing	Repairs to help prevent damage to substrate	3,202
Medium		Modified Bitumen, Lower Porch	7-10 +/-	Large amount of ponding, multiple loose flashing, minimal deficiencies on slate roof, lift and place broken tiles	Repairs needed to extend life of Bitumen Roof and prevent damage to roof system and substrate	10,473
Medium		Modified Bitumen, Slate	2-4 +/- Slate 8-10 +/-	Bitumen roof loose flashing and loose membrane noted, chimney roof system showing signs of deterioration. Slate roof ridge needs to be sealed with new mastic flashing. New roof or restoration	Repairs recommended for extension of roof life expectancy and prevent damage. Flashing on slate roof ridge needed in next 1-2 years.	13,246
Medium		Modified Bitumen, Metal	5-7 +/- 8-10 +/- 1-2 +/-	Open seams and cracks in membrane, improper edge detail, debris needs to be removed. Metal overhang coating on metal overhang is deteriorating	Repairing open seams and cracks will extend life of roof along with coating metal overhang	16,241
Low		Modified Bitumen, Metal Overhang	5-7 +/- 2-4 +/-			
Low		TPD, EPDM, Slate		Deteriorated flashing on TPD roof, Deteriorated flashing on chimney, improper flashing on EPDM roof	Maintain life of roof by repairing deficiencies and improperly installed items	11,708
Low		Modified Bitumen, Slate	2-4 +/- 10+	Damaged gutters, minimal patches, deteriorated metal coping on parapet wall slate roof wall flashing needs repair	Extend roof's life by repairs/patches in EPDM and repair flashing along and metal coping on slate roof along	12,700
Low		Shingle, Clay Tile, Metal	7-10 10+	Overall shingle roof condition good, built in gutters showing multiple leaks and in poor condition. Metal roof coating to be replaced in 1-2 year, lift and place repairs on damaged clay tiles	Prevent damage to substrate of shingle roof, extend life of metal roof by new coating	19,200
Low		Modified Bitumen, Metal, Slate	2-4 +/- 2-4 +/- 10 +/-	Multiple patches need to be installed to extend life of roof system. Current coating on metal is deteriorated needs replacing in 1 to 2 years.	Patching of several penetrations can extend the life of the roof while preventing further damage. Coating will extend life of roof as well.	5,844
Low		Modified Bitumen, Slate	5-7 +/-	Aluminum coating leaving membrane exposed, need new fascia board installed due to current fascia being rotten. Areas of broken tiles need to be replaced	Replacing slate tiles will extend life of roof and prevent damage fascia board needs to be replaced	8,746
Low		Metal	5-7 +/- 10 +/-	Termination bar improperly installed, rust apparent on metal coping, bitumin patches need repaing	Maintain and extend life of roof and proactively prevent damage	8173
Low		Modified Bitumen	8 +/-			

Roofing Innovations, LLC | 1607 Rhoadmiller St, Ste. A, Richmond, VA 23220

Office: 804-447-8426 | URL: roofinginnovation.com

Version: 8.2.21

## Installations (Repairs):

Cost: \$70 per hour plus materials

In this section we will discuss our repair program (re-roofs will be addressed in the “Replacement” section).

Through normal wear and tear, even roofs under warranty tend to leak. We identify the sources of leaks and put a plan in place to remedy the deficiencies. We also identify deficiencies which have the potential to allow for water penetration. The repair work carries a two-year warranty on workmanship. If the area we worked on fails within two years, we return and remedy the failure.

We service all types of roofs and are certified in multiple low slope applications: including, but not limited to EPDM, TPO, PVC, Ballasted, Asphalt Shingles, Slate, and Metal.

### The Process:

1. Upon notification of the leak, we inspect the interior space.
2. We identify anchor points to help us find our way to the same place on the roof.
3. Using the anchor points, we identify the leak area on the roof.
4. We identify all of the potential deficiencies within a 15-foot radius of the leak area.
5. A report is generated identifying all deficiencies.
6. The proposal for work is delivered with the roof report.
7. Upon written approval of the proposal, the repair is scheduled and completed.
  - a. Our team coordinates with on-site staff for check-in, access to the roof and for sign-off on our work.
8. After work is completed, a report – detailing timestamped and dated **before and after photos** of the job – is delivered to the customer along with the invoice. And the benefit is that we can show the problem that we are fixing, and we show how it was fixed. This give you a record of what was fixed.

Examples of completed repairs are outlined in the next three Roof Reports:

Exhibit 5: Roof Report - Slate Repairs

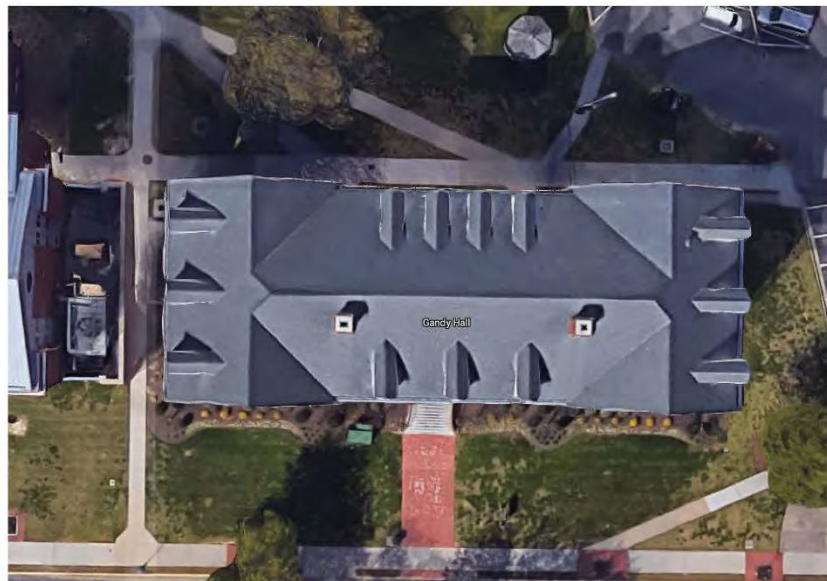
Exhibit 6: Roof Report - EPDM Repairs

Exhibit 7: Roof Report - Modified Bitumen Repairs

Adam Fletcher  
Roofing Innovations  
8/30/2021 | 10 Photos



## Gandy Hall





## Repair Photos

1



Picture showing aerial view of roof.

Project: Gandy Hall VSU  
Date: 8/30/2021, 9:46am  
Creator: Adam Fletcher

2



Picture showing view of slate roof. Mastic flashing applied to ridge line is still considered to be in good condition with no immediate areas of concern. Broken slate observed on roof, Majority of broken slate are not at risk for leaking.

Missing slate shingles and broken slate shingles considered to be at risk of leaking were replaced on-site.

Project: Gandy Hall VSU  
Date: 8/28/2021, 11:48am  
Creator: Chuy Montero

3



Picture showing view of slate roof. Mastic flashing applied to ridge line is still considered to be in good condition with no immediate areas of concern. Broken slate observed on roof, Majority of broken slate are not at risk for leaking.

Missing slate shingles and broken slate shingles considered to be at risk of leaking were replaced on-site.

Project: Gandy Hall VSU  
Date: 8/28/2021, 11:48am  
Creator: Chuy Montero

4



Picture showing view of slate roof. Mastic flashing applied to ridge line is still considered to be in good condition with no immediate areas of concern. Broken slate observed on roof, Majority of broken slate are not at risk for leaking.

Missing slate shingles and broken slate shingles considered to be at risk of leaking were replaced on-site.

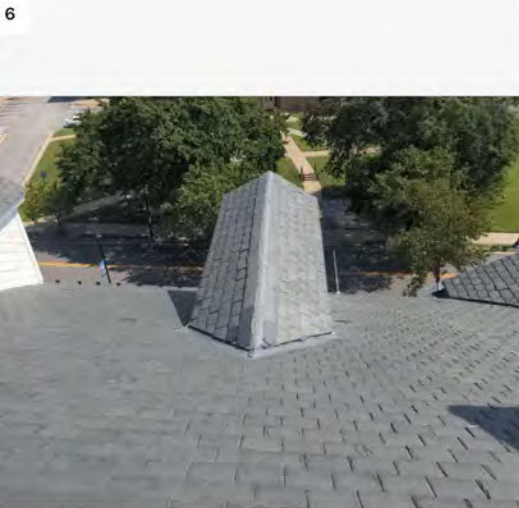
Project: Gandy Hall VSU  
Date: 8/28/2021, 11:49am  
Creator: Chuy Montero



Picture showing view of slate roof. Mastic flashing applied to ridge line is still considered to be in good condition with no immediate areas of concern. Broken slate observed on roof, Majority of broken slate are not at risk for leaking.

Missing slate shingles and broken slate shingles considered to be at risk of leaking were replaced on-site.

Project: Gandy Hall VSU  
Date: 8/28/2021, 11:49am  
Creator: Chuy Montero



Picture showing view of slate roof. Mastic flashing applied to ridge line is still considered to be in good condition with no immediate areas of concern. Broken slate observed on roof, Majority of broken slate are not at risk for leaking.

Missing slate shingles and broken slate shingles considered to be at risk of leaking were replaced on-site.

Project: Gandy Hall VSU  
Date: 8/28/2021, 11:49am  
Creator: Chuy Montero

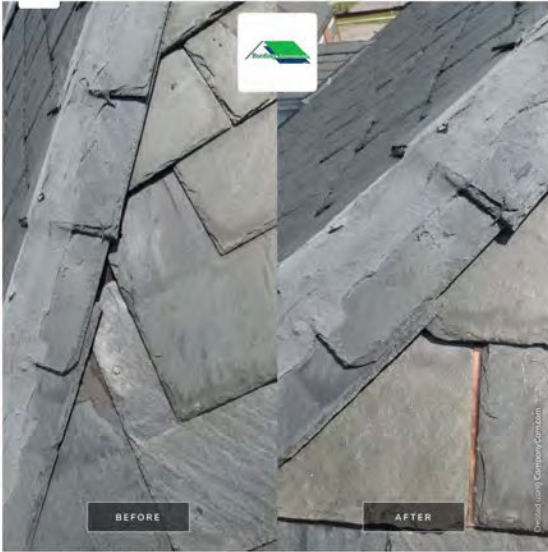
7



Picture showing copper flashing around chimney. All flashing is considered to be in good condition with no immediate areas of concern.

Project: Gandy Hall VSU  
Date: 8/28/2021, 11:49am  
Creator: Chuy Montero

8



Before and after picture of new slate shingle and copper bibs installed where missing.

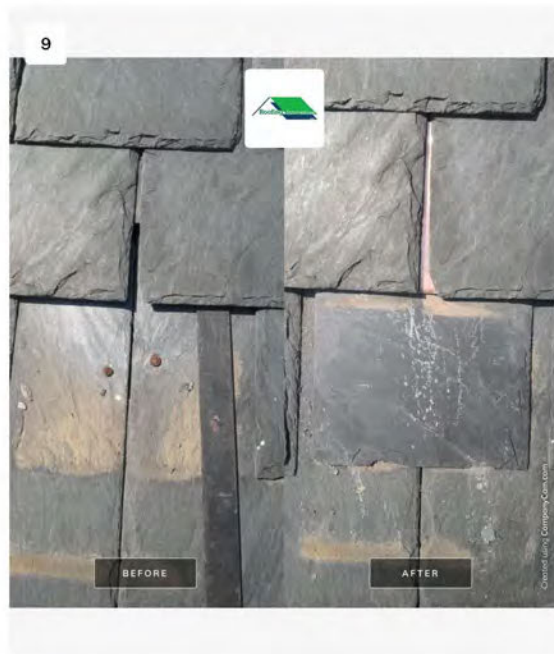
Project: Gandy Hall VSU  
Date: 8/30/2021, 9:43am  
Creator: Adam Fletcher  
Tags: Before and After



Exhibit 5: Roof Report – Slate Repairs (Continued)

Gandy Hall

8/30/2021



Before and after picture of new slate shingle and copper bibs installed where missing.



Before and after picture of new slate shingle and copper bibs installed where missing.

Repair Photos

7 / 7

Gandy Hall VSU

Adam Fletcher  
Roofing Innovations  
8/31/2021 | 11 Photos



## 1657 West Broad St.





## Repair Photos



Aerial view of roof marked with repaired location.

Project: 1657 W Broad St  
Date: 8/5/2021, 7:39am  
Creator: Derek Oates



After picture of new EPDM target patch and flashing installed around deck post.

Project: 1657 W Broad St  
Date: 8/30/2021, 3:14pm  
Creator: Wilmer Gonzalez

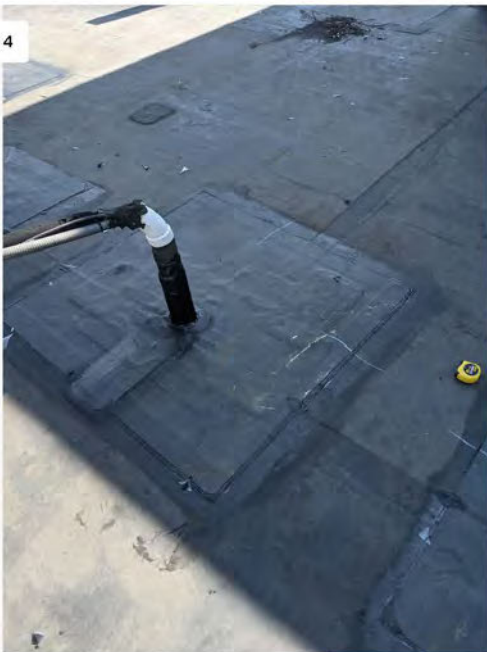
3



After picture of new EPDM target patch and flashing installed around deck post.

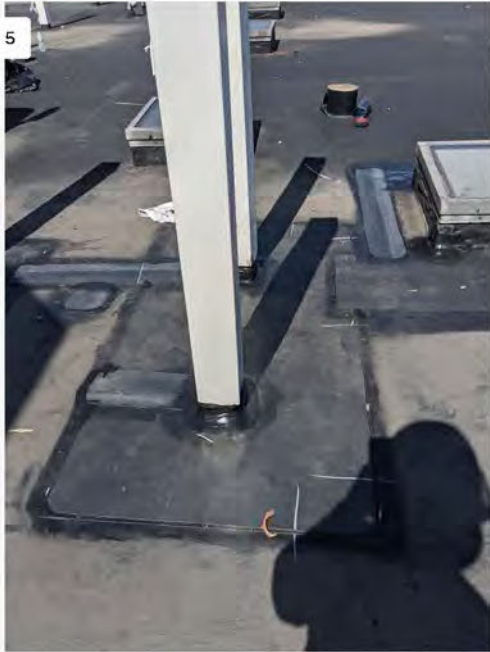
Project: 1657 W Broad St  
Date: 8/30/2021, 3:14pm  
Creator: Wilmer Gonzalez

4



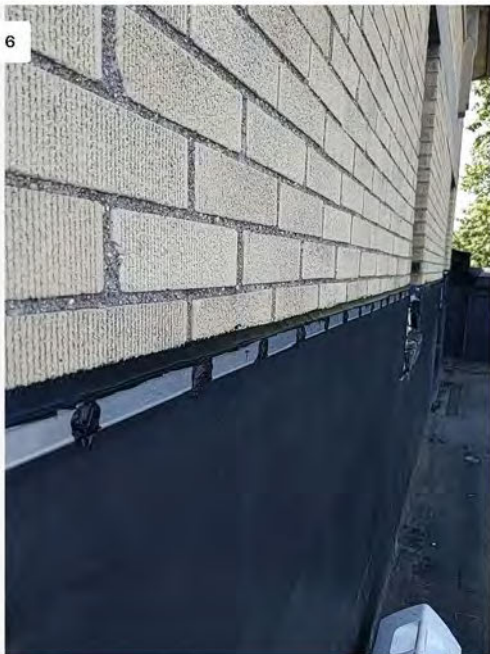
After picture of new EPDM target patch and flashing installed around pipe penetration.

Project: 1657 W Broad St  
Date: 8/30/2021, 3:14pm  
Creator: Wilmer Gonzalez



After picture of new EPDM target patch and flashing installed around deck post.

Project: 1657 W Broad St  
Date: 8/30/2021, 3:15pm  
Creator: Wilmer Gonzalez



After picture of new sealant applied to termination bar on wall flashing.

Project: 1657 W Broad St  
Date: 8/30/2021, 3:15pm  
Creator: Wilmer Gonzalez

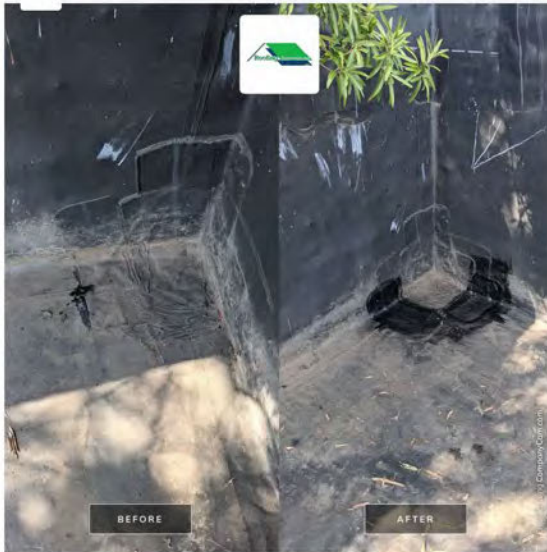
7



After picture of new sealant applied to termination bar on wall flashing.

Project: 1657 W Broad St  
Date: 8/30/2021, 3:16pm  
Creator: Wilmer Gonzalez

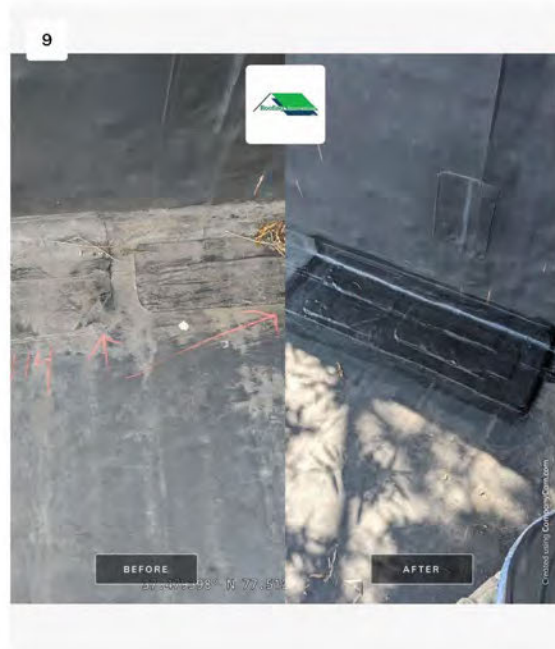
8



Before and after picture of EPDM patch installed over defective patch.

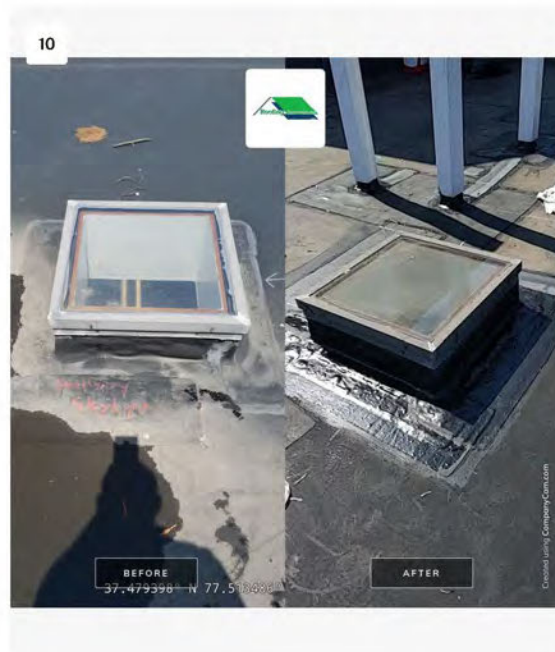
Project: 1657 W Broad St  
Date: 8/31/2021, 2:21pm  
Creator: Adam Fletcher  
Tags: Before and After





Before and after picture of EPDM patch installed over defective patch.

Project: 1657 W Broad St  
Date: 8/31/2021, 2:22pm  
Creator: Adam Fletcher  
Tags: Before and After



Before and after picture of new EPDM flashing installed around skylight.

Project: 1657 W Broad St  
Date: 8/31/2021, 2:28pm  
Creator: Adam Fletcher  
Tags: Before and After



Exhibit 6: Roof Report – EPDM Repair (Continued)

1657 West Broad St.

8/31/2021

11



The image is a side-by-side comparison of a roof repair. The left side, labeled 'BEFORE', shows a white deck post on a flat roof with a large, irregular hole in the EPDM membrane around its base. The right side, labeled 'AFTER', shows the same post with a new, dark EPDM patch and flashing installed, sealing the area. A small icon of a house with a green roof is visible in the top center of the image area. A vertical watermark 'Created using CampanyCam.com' is on the right edge of the image.

Before and after picture of new EPDM target patch and flashing installed around deck post.

Project: 1657 W Broad St  
Date: 8/31/2021, 2:29pm  
Creator: Adam Fletcher  
Tags: Before and After

Repair Photos

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1657 W Broad St

Adam Fletcher

Roofing Innovations

9/16/2021 | 10 Photos



## 209 South Arthur Ashe Blvd.



209 South Arthur Ashe Blvd.

9/16/2021

## Repair Photos

Repair Photos

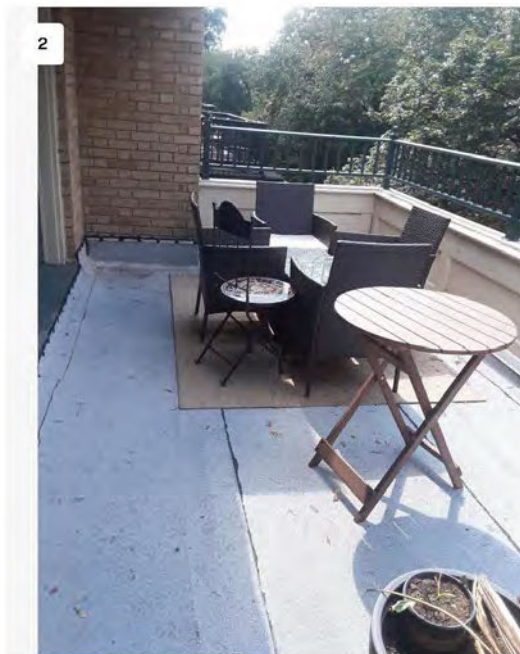
2 / 7

209 S Arthur Ashe Blvd



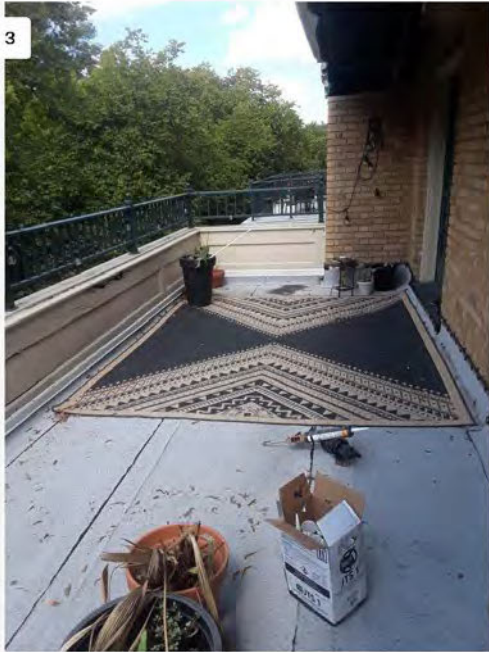
Picture showing aerial view of roof.

Project: 209 S Arthur Ashe Blvd  
Date: 8/25/2021, 9:42am  
Creator: Adam Fletcher



After picture showing new termination bar installed on modified bitumen wall flashing, New sealant applied to counter-flashing, And new modified bitumen patches installed over defective areas in membrane.

Project: 209 S Arthur Ashe Blvd  
Date: 9/15/2021, 4:09pm  
Creator: Duver Gonzalez



After picture showing new termination bar installed on modified bitumen wall flashing, New sealant applied to counter-flashing, And new modified bitumen patches installed over defective areas in membrane.

Project: 209 S Arthur Ashe Blvd  
Date: 9/15/2021, 4:09pm  
Creator: Duver Gonzalez

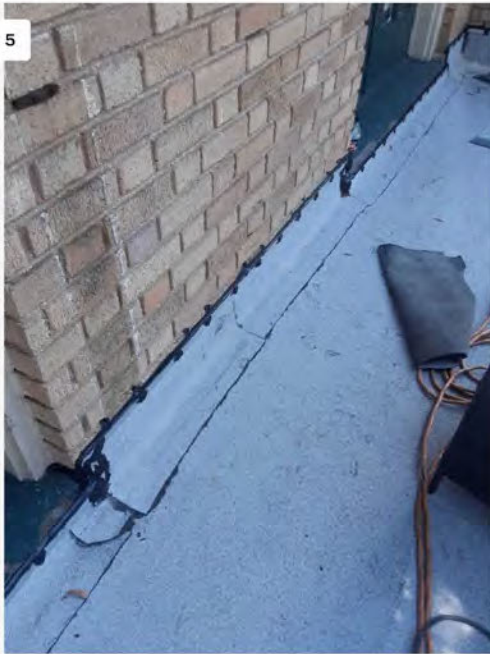


After picture showing new termination bar installed on modified bitumen wall flashing.

Project: 209 S Arthur Ashe Blvd  
Date: 9/15/2021, 4:08pm  
Creator: Duver Gonzalez



5



After picture showing new termination bar installed on modified bitumen wall flashing.

Project: 209 S Arthur Ashe Blvd  
Date: 9/15/2021, 4:08pm  
Creator: Duver Gonzalez

6



Before and after picture of modified bitumen patch installed over defective area in membrane.

Project: 209 S Arthur Ashe Blvd  
Date: 9/16/2021, 7:42am  
Creator: Adam Fletcher  
Tags: Before and After



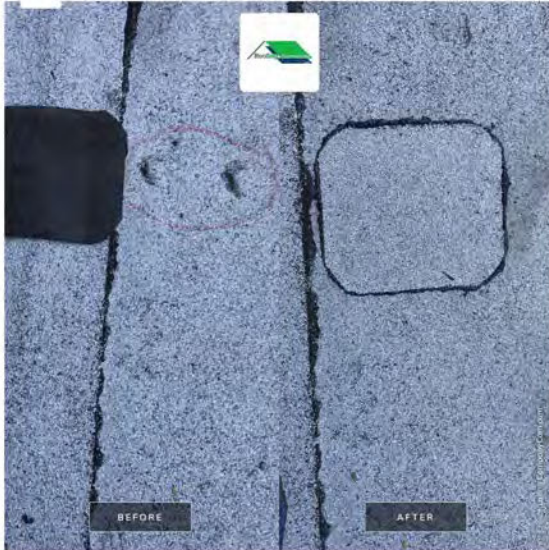
7



Before and after picture of modified bitumen patch installed over defective area in membrane.

Project: 209 S Arthur Ashe Blvd  
Date: 9/16/2021, 7:43am  
Creator: Adam Fletcher  
Tags: Before and After

8



Before and after picture of modified bitumen patch installed over defective area in membrane.

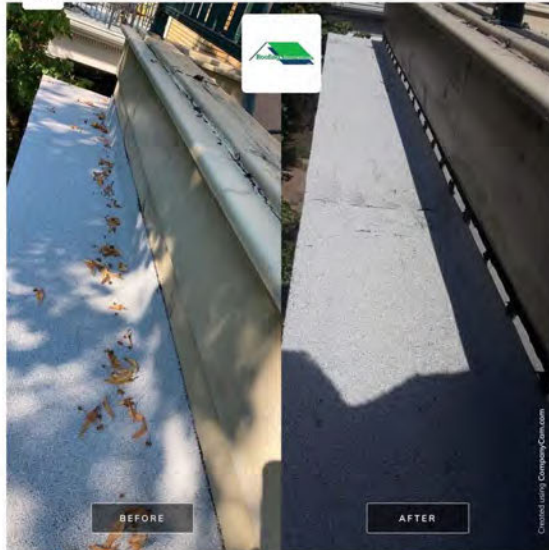
Project: 209 S Arthur Ashe Blvd  
Date: 9/16/2021, 7:43am  
Creator: Adam Fletcher  
Tags: Before and After

Exhibit 7: Roof Report – Modified Bitumen (Continued)

209 South Arthur Ashe Blvd.

9/16/2021

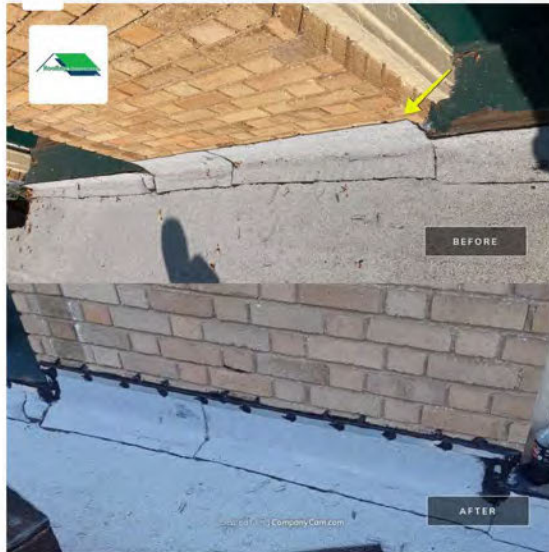
9



Before and after picture showing new termination bar installed on modified bitumen wall flashing.

Project: 209 S Arthur Ashe Blvd  
Date: 9/16/2021, 7:45am  
Creator: Adam Fletcher  
Tags: Before and After

10



Before and after picture showing new termination bar installed on modified bitumen wall flashing.

Project: 209 S Arthur Ashe Blvd  
Date: 9/16/2021, 7:49am  
Creator: Adam Fletcher  
Tags: Before and After

Repair Photos

7 / 7

209 S Arthur Ashe Blvd

## Maintenance:

Cost: Low Slope is calculated on a per roof basis at \$0.07 per square foot, and Steep Slope is calculated on a combination of building height and linear feet of guttering.

We promote preventive maintenance as a method for preserving the life of the roof and for maintaining warranty status of the roof. Additionally, studies have shown that adopting a preventive maintenance plan reduces the lifetime cost of the roof by reducing the amount of repairs needed and by extending the service life of the roof.

We provide two types of maintenance. Our low slope preventive maintenance is designed to keep the roof and drains clean of debris so water can flow off of the roof. Additionally, we repair minor deficiencies while performing inspections and present remedy plans for serious deficiencies. The steep slope preventive maintenance focuses more on directing water away from the building through gutter cleaning and cleaning debris from the roof.

### The Process:

#### Low Slope.

1. Discovery work: manufacturer's requirements for warranty coverage, Identify active leaks on the roof.
2. Gather and input all roof specifications
3. Roof evaluation (with photos)
  - a. Condition of roofing surface
  - b. Condition of flashings
  - c. Condition of penetrations
  - d. Inspection of drains/scuppers
  - e. Identify standing water
  - f. Inspection of gutters and downspouts
4. Evaluation is captured in software
5. Repairs made (up to 1% of the surface area)
6. Evaluation is produced as a report and reviewed with customer
7. Deficiencies (over the 1% threshold) are presented to the customer
8. Proposals for prepared and delivered to the customer

Provided for your reference are example documents used and generated for our customers:

Exhibit 8: Preventive Roof Maintenance Agreement (PRM)

Exhibit 9: PRM Initial Evaluation (Internal Documents used for Initial Roof Assessment)

Exhibit 10: PRM Follow up Evaluation (Internal Documents used for Follow-up Assessments)

Exhibit 11: PRM Roof Report (Sample Report generated after roof maintenance is performed)



## Roof Maintenance Agreement

Proper maintenance will prolong the life of any roof. We offer a maintenance plan that will extend the serviceable life of your roof while satisfying the manufacturer's warranty requirements. This regularly scheduled maintenance also provides you with peace of mind as we address any issues that may result in unexpected leaks or other issues.

### PROGRAM INCLUDES:

- Clean Drains, scuppers, and gutters of foreign material. Drains will be cleaned around the roof surface.
- All flashing will be inspected. Any open flashing will be sealed.
- Blisters or loose roof areas will be inspected. Not all loose areas or blisters represent potential leak problems. If Roofing Innovations determines that a blister has a strong possibility of creating a leak within a 12-month period, the blister will be repaired. (Blisters to be repaired will not exceed 1% of the total roof area.)
- Repair membrane damage up to 1% of total roof area. Damages to be repaired include punctures, splits, and deteriorated coating.
- Inspection Report.
- Annual Moisture survey using thermal imaging to identify wet insulation trapped in the roof.

### EACH INSPECTION REPORT WILL INCLUDE:

- Condition summary and photos.
- Roof Drawing with all components labeled.
- A written estimate for any repair work needed that is not covered by this agreement.

*In the event that needed repairs exceed 1% of the total roof area, the building owner/representative will be notified and a quotation for the work needed will be provided.*

PRICING:	<u>Under Warranty</u>	<u>Outside of Warranty</u>
	Roofs under 15,000 sf = \$1,000 Roofs over 15,000 sf = \$0.07 per sf	Ask for a free estimate

**ROOF:** \_\_\_\_\_ Square Footage: \_\_\_\_\_  
Manufacturer: \_\_\_\_\_ Warranty #: \_\_\_\_\_  
Service Address: \_\_\_\_\_

**AGREEMENT:** Roofing Innovations \_\_\_\_\_ Client Name: \_\_\_\_\_  
Signature: \_\_\_\_\_ Client Signature: \_\_\_\_\_  
Date: \_\_\_\_\_ Date: \_\_\_\_\_

1607 Rhoadmiller Street Suite A • Phone: 804-447-8426 • Fax: 804-447-8429 • [www.roofinginnovation.com](http://www.roofinginnovation.com)





### INSPECTION CHECKLIST:

General Roof Conditions	
Item	Remarks
Debris on Roof	
Drainage	
Physical Damage	
Attic Conditions	
Structural Deformation	
Other	
<b>Flat / Membrane Roof</b>	
Item	Remarks
Condition of Coating	
Granular Loss	
Punctures	
Cracks / Alligatoring	
Blisters / Fishmouths	
Ponding	
Other	
<b>Sloped Roof</b>	
Item	Remarks
Roof Material	
Condition of Surface	
Deformed Edges	
Shingle: Buckled	
Curled	
Missing Tabs	
Granular Loss	
Other	
Metal: Corrosion	
Fasteners	
Other	
<b>Roof Features</b>	
Item	Remarks
Fascia	
Soffit	
Flashing	
Gutters / Drains, etc.	
Skylights	
Chimneys / Vents	
Fall Arrest Anchors	
Control Zone Access	
Drains / Vents	
Other	

Ceiling Conditions	
Item	Remarks
Cracks	
Water Staining	
Water Leaks	
Seasonal Change	
Other	
<b>Exterior Wall Surfaces</b>	
Item	Remarks
Deformed Finish	
Surface Deterioration	
Staining	
Other	
<b>Interior Wall Surfaces</b>	
Item	Remarks
Cracks	
Water Staining	
Water Leaks	
Deformed Finish	
Seasonal Change	
Window Leaks	
Door/Window Alignment	
Other	

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**SUMMARY COMMENTS:**

(Highlight Areas of Concern and any rapid degradation in roof system)

---

**OVERALL ROOF CONDITION:**

(Comment on changes from previous inspections. Indicate recommended action of roof repair and/or further assessment, and estimate remaining life expectancy of roof system. Include any photographs and thermography records in this report.)

---

**OBSERVED DEFICIENCIES:**

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## Initial Setup Visit Preventative Roof Maintenance

Inspector Name: \_\_\_\_\_ Inspection \_\_\_\_\_

Date: Roof Inspection Check List

- ☒ If more than 150 squares order skymeaure prior to visit.
- ☒ Complete PreVisit Section of Document prior to visiting project
- ☒ Interior and roof top photos see photo list
- ☒ Building exterior elavation photos of building taken
- ☒ If less than 150 squares create roof drawing onsite.
- ☒ All photos labeled into roof area (A, B, C, D etc.)
- ☒ Roof composition identified for each roof area
- ☒ Test Cut/Probe locations shown on roof plan and listed in report
- ☒ All parapet wall and base flashing heights on roof plans and report
- ☒ All gutter and downspout type, size and condition identified on roof plans & report
- ☒ All perimeter detail types, sizes identified in report
- ☒ All roof penetrations on roof plans and report
- ☐
- ☐
- ☐
- ☐
- ☐



## Roof System Condition Evaluation Report

### PROJECT INFORMATION

Facility Name: \_\_\_\_\_ Facility Contact: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Year Building Built: \_\_\_\_\_ Building Use: \_\_\_\_\_

E Exterior Wall Type: Brick

### ROOF AREA DATA

Building Number: 6008 Area Label(s): \_\_\_\_\_ Leak History: Moderate

Year Roof Installed: \_\_\_\_\_ Leak Sensitivity: Low

Roof Elevation: 40 ft Maintenance Items  
Roof Traffic: Yes

### Guarantee Information

Guarantee (Y/N): No Manufacturer: \_\_\_\_\_ Guarantee Term: \_\_\_\_\_

Guarantee Number: \_\_\_\_\_

### COMPLETE ROOF SYSTEM COMPOSITION / CROSS SECTION

**Note: Start with the roof deck as layer 1 and list all components of the entire system**

Layer	Type	Thickness	Attachment	Condition
1	Wood deck	3/4 inch	Mechanical	Good
2	Insulation	2 inch	Mechanical	Good
3	Tpo	1/8	Fully adhered	Good
4				
5				
6				
7				
8				
9				
10				
11				



## Roof System Condition Evaluation Report

### ROOF AREA DATA – CONT'D

#### Base Flashings

Flashing Type: Typ

Height: 1 ft

Coated: No

Securement: Adhered

CF Type: Coping

Reglet Joint: ☐

Thru Wall: ☐

Surface Mount: ☐

Term Bar: ☐

#### Perimeter Types

Eave Edge Detail:

Eave Edge Material:

Rake Edge Detail:

Rake Edge Material:

#### Penetrations

Pipe Penetration: ☒

Pitch Pockets: ☒

Exhaust Units: ☐

Skylights: ☐

Roof Hatch: ☒

HVAC Unit: ☒

Pipe Supports: ☐

#### Quantity

<u>Item</u>	<u>Size</u>	<u>Material Type</u>	<u>Quantity</u>
<input checked="" type="checkbox"/> Roof Drains:	<u>4 inches</u>	<u>Steel</u>	<u>12</u>
<input type="checkbox"/> Scuppers:	<u></u>	<u></u>	<u></u>
<input type="checkbox"/> Gutters:	<u></u>	<u></u>	<u></u>
<input checked="" type="checkbox"/> Downspouts:	<u>8 inches total</u>	<u>Aluminum</u>	<u>8</u>
<input checked="" type="checkbox"/> Coping:	<u>12</u>	<u>Steel</u>	<u></u>

#### Drainage

Slope:



## Roof Technician Preventative Roof Maintenance

Inspector Name: Corey Selden Inspection Date 7/14/21

Date: Roof Inspection Check List

- ☒ Review Initial Visit Report prior to Visiting
- ☒ Document roof deficiencies on report and aerial roof drawing
- ☒ Document condition of flashings and penetrations
- ☒ Interior and roof top photos of leak areas taken
- ☒ All active roof leaks marked on roof plan and identified in report
- ☒ Building exterior elevation photos of building taken
- ☒ Inspect all flashing. Any open flashing will be sealed.
- ☒ Roof membrane inspected. Repair up to \_\_\_\_\_ sq of roof area
- ☒ All photos labeled into roof areas (A, B, C, D etc. etc.) when uploaded to software
- ☒ Clear drains, scuppers, gutters, and roof of all debris

## Roof System Condition Evaluation Report

### PROJECT INFORMATION

Inspection Date: 7/14/21 Inspector(s): Corey Selden , Nery gonzalez

Exterior Moisture Staining: Yes Exterior Wall Condition: Good

### COMMENTS

5802-5804



## Roof System Condition Evaluation Report

### ROOF AREA DATA

Remaining Service Life (years): \_\_\_\_\_

Active Leaks: \_\_\_\_\_

Quantity of Leaks: \_\_\_\_\_

#### Maintenance Items

Mechanical Damage: \_\_\_\_\_

Chemical Exposure: None Observed

#### Base Flashings

Condition: Good

#### Perimeter Types

Debris: \_\_\_\_\_

Edge Edge Condition: \_\_\_\_\_

Rake Edge Condition: \_\_\_\_\_

#### Item

#### Condition

#### Drainage

- ☐ Roof Drains: Yes good
- ☐ Scuppers: \_\_\_\_\_
- ☐ Gutters: \_\_\_\_\_
- ☐ Downspouts: \_\_\_\_\_
- ☐ Coping: Yes good

Drainage: Good

Ponding Water: Yes

Drainage Comments: \_\_\_\_\_

A little bit of ponding near drains.

## Roof System Condition Evaluation Report

Units: Each (EA)  
Squares (SQS)

Lineal Feet (LF)  
Typical (TYP)

Square Feet (SF)  
Miscellaneous (MISC)

Locations (LOC)  
Areas (Areas)

### ROOF SYSTEM DEFICIENCIES

Number	Description	QTY	Unit
1	No deficiencies seen		
2			
3			
4			
5			
6			
7			
8			
9			
10			



Photo Report by Roofing Innovations

Created by Adam Fletcher

Nov 20, 2020 | 10 Photos



## 2601 Maury St. #25 P.R.M







Picture showing layout of buildings.

Project: P.R.M Warehouse 25  
Date: June 15th, 2020, 8:24 a.m.  
Creator: Adam Fletcher



Aerial view of building.

Project: P.R.M Warehouse 25  
Date: June 15th, 2020, 8:46 a.m.  
Creator: Adam Fletcher



Picture showing view of roof.

Project: P.R.M Warehouse 25  
Date: June 15th, 2020, 10:01 a.m.  
Creator: Duver Gonzalez



Picture showing view of roof.

Project: P.R.M Warehouse 25  
Date: June 15th, 2020, 10:01 a.m.  
Creator: Duver Gonzalez



Picture showing view of roof.

Project: P.R.M Warehouse 25  
Date: June 15th, 2020, 10:01 a.m.  
Creator: Duver Gonzalez



Picture showing gutters free of debris.

Project: P.R.M Warehouse 25  
Date: November 5th, 2020, 1:05 p.m.  
Creator: Duver Gonzalez



Before and after picture of TPO patch installed over open seam in membrane.

Project: P.R.M Warehouse 25  
Date: November 20th, 2020, 2:33 p.m.  
Creator: Adam Fletcher  
Tags: Before and After



Before and after picture of TPO patch installed over puncture hole in membrane.

Project: P.R.M Warehouse 25  
Date: November 20th, 2020, 2:34 p.m.  
Creator: Adam Fletcher  
Tags: Before and After



Before and after picture of TPO patch installed over puncture hole in membrane.

Project: P.R.M Warehouse 25  
Date: November 20th, 2020, 2:36 p.m.  
Creator: Adam Fletcher  
Tags: Before and After

Exhibit 11: PRM Roof Report (Continued)



Before and after picture of TPO patch installed over defective seam in membrane.

Project: P.R.M Warehouse 25  
Date: November 20th, 2020, 2:37 p.m.  
Creator: Adam Fletcher  
Tags: Before and After

## Replacement:

Cost: \$70 per hour plus materials

Full roof replacements is one of the four pillars of our company. Along with Repairs, Shingle Roofing, and Maintenance, we provide re-roofing services. We work closely with our customer to identify the appropriate solution for their roofing requirement. When assessing a re-roof, we encourage our customers to follow a process of discovery to explore what would best suit their needs and budget. We look at four alternatives: Repair, Restoration, Recovery, Re-Roof.

**Repair:** Strategic repairs that keep the system watertight. In many cases, it becomes more cost-effective to perform strategic repairs for a period of time. We look at the yearly amortized cost of the roof and use that to set the threshold for repair costs. Once the costs to repair exceed the amortized cost of the roof, then we explore the next alternative.

**Restoration:** This is the process of applying a coating or liquid membrane to an existing roof system. We go over the benefits and drawbacks of the system and determine whether this system is the best fit. This is very cost effective and carries warranties comparable to Recovery and Re-Roofing.

**Recovery:** We refer to a roof overlay as Recovery. Without the costly removal and replacement of insulation, there are situations where an overlay is an appropriate roofing application. We determine with the customer whether this is the appropriate solution for their roof.

**Re-Roof:** This is oftentimes the most expensive solution, but in some cases the only solution. This includes the removal of insulation and roofing material down to the roof decking. Decking is repaired where required and a new system is applied.

Process:

1. Discovery work: physical inspection with photos
2. Explore Roofing options
3. Set Specifications
4. Create proposal
5. Finalize contract & payment schedule
6. Receive down-payment / Materials Order
7. Schedule work / Order Materials
8. Complete the work
9. Walk through with customer / Final punch list
10. Final Invoice / Roof Report

### *Industry Challenges: Supply Chain*

The current supply chain within the roofing industry is operating at a sub-par level. There are extensive materials shortages which includes membrane, fasteners, coatings and insulation. All projects have been affected by the shortages. We have seen smaller projects wait months for membrane and for larger projects up to six months for materials to become available. For this reason, we work with our customers to begin planning for larger projects as soon as possible.

Below are two examples of roof replacements for a metal and TPO roofs. The Metal roof was a small job performed for Virginia State University while the TPO roof was for a small apartment building owned by a national real estate fund.

#### Exhibit 12: Metal Roof Replacement

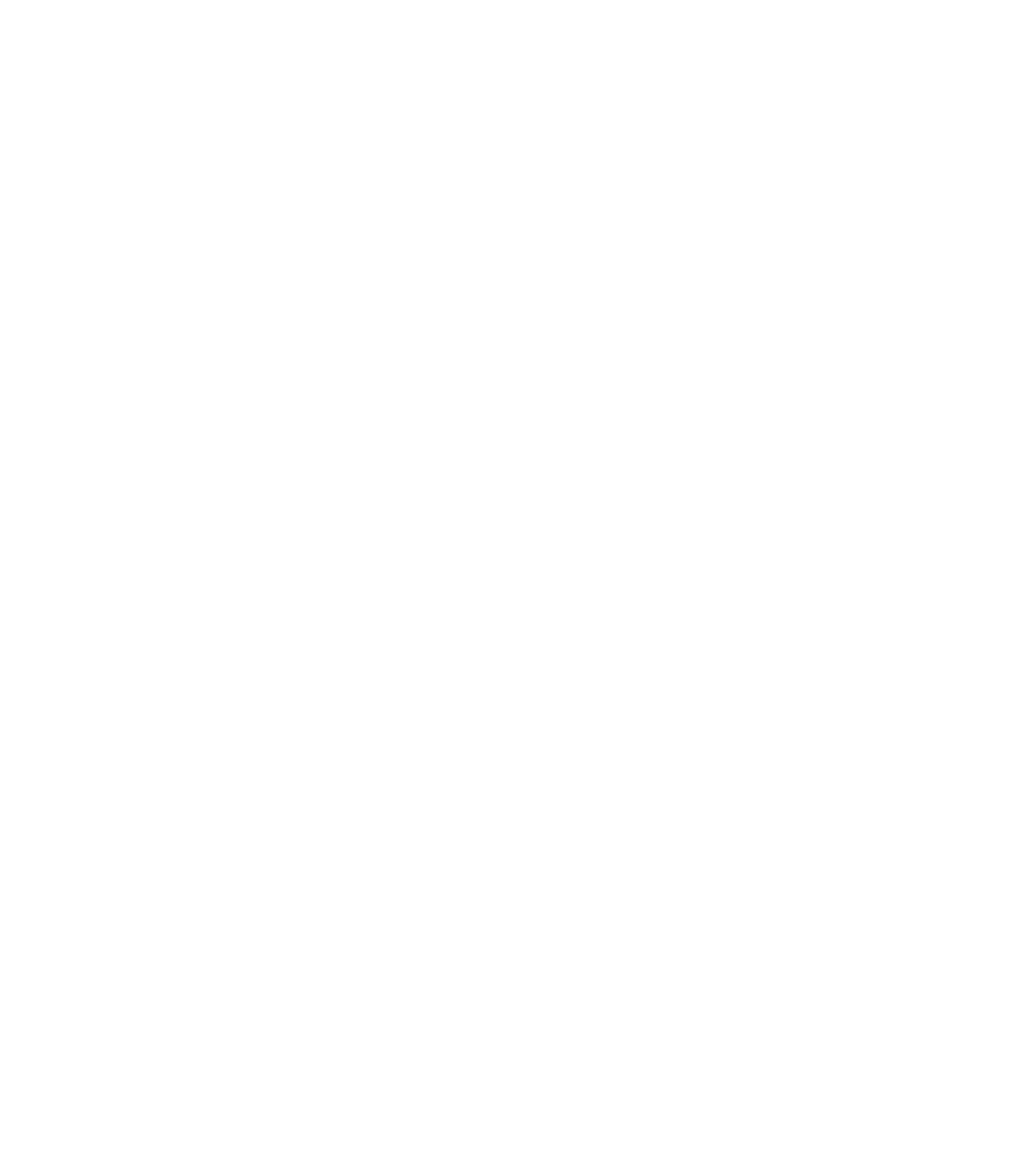




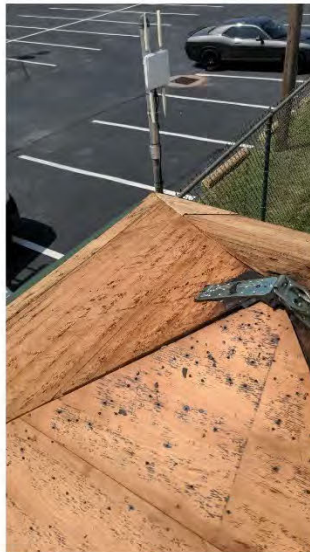
Photo Report by Roofing Innovations

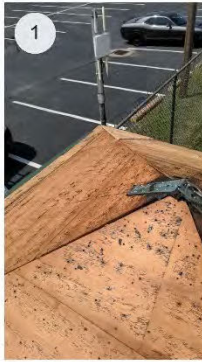
Created by Kyle Tucker

Jul 26, 2021 | 28 Photos



## Rodgers Stadium Ticket Booths





Project: 20700 4th Ave  
Date: July 15th, 2021, 11:10 a.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 15th, 2021, 11:10 a.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 15th, 2021, 11:10 a.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 15th, 2021, 11:10 a.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 15th, 2021, 11:11 a.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 15th, 2021, 11:11 a.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 15th, 2021, 3:41 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 15th, 2021, 3:41 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 15th, 2021, 3:42 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 15th, 2021, 3:42 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 16th, 2021, 4:37 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 16th, 2021, 4:37 p.m.  
Creator: Wilmer Gonzalez



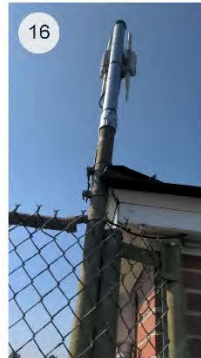
Project: 20700 4th Ave  
Date: July 16th, 2021, 4:38 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 16th, 2021, 4:38 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 16th, 2021, 4:38 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 16th, 2021, 4:38 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 20th, 2021, 3:28 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 20th, 2021, 3:28 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 20th, 2021, 3:28 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 20th, 2021, 3:29 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 20th, 2021, 3:29 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 23rd, 2021, 12:51 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 23rd, 2021, 12:51 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 23rd, 2021, 12:51 p.m.  
Creator: Wilmer Gonzalez



Exhibit 12: Metal Roof Replacement (Continued)



Project: 20700 4th Ave  
Date: July 23rd, 2021, 12:52 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 23rd, 2021, 12:52 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 23rd, 2021, 12:52 p.m.  
Creator: Wilmer Gonzalez



Project: 20700 4th Ave  
Date: July 26th, 2021, 10:32 a.m.  
Creator: Adam Fletcher  
Tags: Before and After



## EXPERIENCE

*O. 1. b. Describe experience providing roofing inspection, installation, maintenance, and replacement services. Emphasize experience with other higher education institutions.*

Our services begin with the Temporary Emergency Repairs. With our customer we determine a pre-determined fixed price for stopping the water from penetrating the building. This flat rate is a temporary fix which allows a team to respond within 48 hours. Stopping the water immediately prevents further damage to the property while removing the headaches of an active leak. Our teams respond within 48 hours, so damage is limited. After stopping the water, we evaluate the problem and propose a permanent solution if one is needed. There is a 30-day warranty on temporary emergency repairs.

From the evaluation we prepare a proposal to permanently repair any deficiencies. This is a fixed price proposal which is delivered to the decision maker. With the water stopped, this is a repair that can be scheduled at the customer's convenience. These repairs carry a two-year warranty.

We also provide proactive services to help with budgeting and also to protect the warranty status of roofs. Preventive Roof Maintenance plans are required by manufacturers in order to warrant their products. We provide yearly subscription plans for cleaning roof surfaces, drains and gutters, which keep customers in compliance with manufacturer requirements.

Our Budget and Analysis program groups buildings, assesses their likelihood of water penetration, and ranks them by severity. This ranking allows building owners to prioritize and plan spending on their roofs.

Other variations of this program have been used to determine the resources needed to keep a roof water-tight for the year. This is oftentimes used when an owner is planning for a re-roof within a few years and needs to maintain their roof until it can be replaced.

Full roof replacements are also part of our offering. Working with our customers, we help evaluate appropriate roof systems, budgets and timing. Our team works in concert with facilities to ensure that work is completed on time and within budget.

## Inspection & Installation

Our experience is well documented in the roof reports that are included in this Response. We documented our work in TPO, EPDM, Slate, Asphalt Shingles, Modified Bitumen, and Ballasted systems. We have successfully performed other work, which did not fit into the scope of this RFP. The Scope of our work ranges from Temporary Emergency repairs at \$350 each to re-roofing large centers for \$350,000. When our interests are aligned with that of our customers, we understand that the smaller jobs are just as pressing and important as a new roof installation.

Our current university client base is made up of The College of William and Mary, Old Dominion University, Virginia State University and Virginia Union University. The Old Dominion University contract was awarded in late September, and we are working with their facilities department on an evaluation plan for their highest risk buildings. A similar program is in place at Virginia Union

University. We would be happy to place James Madison University in contact with our points of contact for these programs at Old Dominion University and Virginia Union University.

The College of William and Mary utilized a different approach where they hired us to perform an in-depth inspection of one of their roofs. We provided the inspection for a cost of \$2,000 and proposed repairs based on that detailed inspection. The results of that inspection are detailed in the following exhibits:

Exhibit 13: Roof Inspection Checklist

Exhibit 14: Monroe Hall Inspection Report



## Roof System Condition Evaluation Report

### PROJECT INFORMATION

Facility Name: Monroe Hall Facility Contact: Jeff Beattie  
Address: 226 Richmond Road City: Williamsburg State: VA Zip: 23185  
Inspection Date: 3-5-2021 Inspector(s): Duver, Corey  
Year Building Built: 1924 Building Use: Student housing  
Exterior Moisture Staining: Yes ☒ Exterior Wall Type: Masonry Exterior Wall Condition: Good

### COMMENTS

On March 5, 2021 a visual inspection was conducted on the roof of Monroe Hall. This report identifies general observations and deficient conditions on all roof systems, This includes slate shingles and low slope metal roof. Roof is considered to be in 'Fair' condition at this time. Two active leaks reported at time of inspection. Damage at eave of metal roof was observed due to high winds lifting metal panels loose for decking. Previous repairs observed where screws and plates were installed in metal panels to refasten to wood substrate. Additional screws and plates installed at time of inspection to secure metal panels affected by wind damage. At this time the repairs (both previous and additional) are not affecting the performance of metal roof system, corrective action is suggested within 5 years. Multiple deficiencies observed on slate section of roof including, Loose/ Missing slate shingles and deteriorated sealants on ridge line. Both deficiencies can be easily corrected with new slate shingles, flashing mastic and fabric. These deficiencies should be corrected to extend life of slate roof. Remaining service life of slate roof is estimated to be 20+ Years. Remaining service life of low slope metal roof is estimated to be 2-4 years. At time of replacement of metal roof system, it is suggested to go to with a low slope single ply system.



## Roof System Condition Evaluation Report

### ROOF AREA DATA

Building Number: \_\_\_\_\_ Area Label(s): Metal  
 Year Roof Installed: N/D  
 Remaining Service Life (years): 2-4 +/-  
 Roof Elevation: 30 +/-

Active Leaks: Yes  
 Quantity of Leaks: 2  
 Leak History: Unknown  
 Leak Sensitivity: Normal

### Roofing Contractor

Contractor: N/D  
 Contact: N/D  
 Phone: N/D

### Guarantee Information

Guarantee (Y/N): \_\_\_\_\_  
 Manufacturer: N/D  
 Guarantee Term: N/D  
 Guarantee Number: N/D

### Maintenance Items

Mechanical Damage: N/A  
 Chemical Exposure: None Observed  
 Roof Traffic: No  
 Debris: None Observed

### Roof Deck Support Structure

Roof Truss Type: Wood Height: N/D Span: Varies Spacing: 16" O.C.

### COMPLETE ROOF SYSTEM COMPOSITION / CROSS SECTION

**Note: Start with the roof deck as layer 1 and list all components of the entire system**

Layer	Type	Thickness	Attachment	Condition
1	Wood Plank Deck	.75"	Mechanical	Good
2	Underlayment Not Determined		Mechanical	
3	Slate/ Metal panels	N/D	Mechanical	Good/ Fair
4				
5				
6				
7				
8				
9				
10				
11				



## Roof System Condition Evaluation Report

### ROOF AREA DATA – CONT'D

#### Base Flashings

Flashing Type: Metal  
 Height: Varies  
 Coated: Yes  
 Cant Strip Type: N/D  
 Condition: Fair  
 Securement: Mechanical  
 CF Type: Metal  
 Reglet Joint: ☒  
 Thru Wall: ☐  
 Surface Mount: ☐  
 Term Bar: ☐

#### Perimeter Types

Gravel Slop Type: None  
 Gravel Slop Condition: N/D  
 Parapet Wall Type: N/A  
 Parapet Wall Condition: N/A  
 Wall Coping Type: N/A  
 Wall Coping Condition: N/A  
 Expansion Joint Type: N/A  
 Expansion Joint Condition: N/A

#### Penetrations

Soil Stacks: ☒  
 Exhaust Units: ☐  
 Standard Curbs: ☐  
 Pipe Supports: ☐  
 Pitch Pans: ☐  
 Roof Hatch: ☒  
 Hot Stacks: ☐  
 Skylights: ☐  
 Smoke Hatch: ☐  
 Other: ☐

<u>Item</u>	<u>Size</u>	<u>Material Type</u>	<u>Quantity</u>	<u>Condition</u>
<input type="checkbox"/> Roof Drains:	_____	_____	_____	_____
<input type="checkbox"/> Scuppers:	_____	_____	_____	_____
<input checked="" type="checkbox"/> Gutters:	<u>6" +/-</u>	<u>Metal</u>	_____	<u>Fair</u>
<input type="checkbox"/> Downspouts:	_____	_____	_____	_____
<input type="checkbox"/> Coping:	_____	_____	_____	_____

#### Roof Moisture Survey

Moisture Survey Completed: No   
 Results: N/A   
 Number of Anomalies: N/A

#### Drainage

Drainage: Good   
 Slope: 1:12   
 Ponding Water: No   
 Drainage Comments: \_\_\_\_\_





## Roof System Condition Evaluation Report

Units: Each (EA)      Lineal Feet (LF)      Square Feet (SF)      Locations (LOC)  
 Squares (SQS)      Typical (TYP)      Miscellaneous (MISC)      Areas (Areas)

### **ROOF SYSTEM DEFICIENCIES**

Number	Description	Unit
1	Mortar Damage on brick Chimney	Each
2	Punctures In metal	Location
3	Deteriorated coating	Location
4	Open seams on flashing	Location
5	Broken/ Missing slate	Location
6	Deteriorated mastic flashing on ridge line	Location
7	Loose metal panels	Location
8	Exposed nails	Location
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		
19		
20		
21		
22		
23		
24		
25		



# Roof System Condition Evaluation Report

Units:    Each (EA)                      Lineal Feet (LF)                      Square Feet (SF)                      Locations (LOC)  
             Squares (SQS)                  Typical (TYP)                      Miscellaneous (MISC)                  Areas (Areas)

**ROOF SYSTEM DEFICIENCIES**

Number	Description	Unit
26		
27		
28		
29		
30		
31		
32		
33		
34		
35		
36		
37		
38		
39		
40		
41		
42		
43		
44		
45		
46		
47		
48		
49		



## Roof System Condition Evaluation Report

### **TEST CUT / ROOF MOISTURE PROBE INFORMATION**

Test Cut/Probe Number						
Test Cut Size						
Troxler Reading						
Infrared Reading						
Delmhorst Reading						
Deck Condition						
Vapor Retarder Condition						
Insulation Condition						
Membrane Condition						

Test Cut/Probe Number						
Test Cut Size						
Troxler Reading						
Infrared Reading						
Delmhorst Reading						
Deck Condition						
Vapor Retarder Condition						
Insulation Condition						
Membrane Condition						

E-mail Completed Report Form

Photo Report by Roofing Innovations

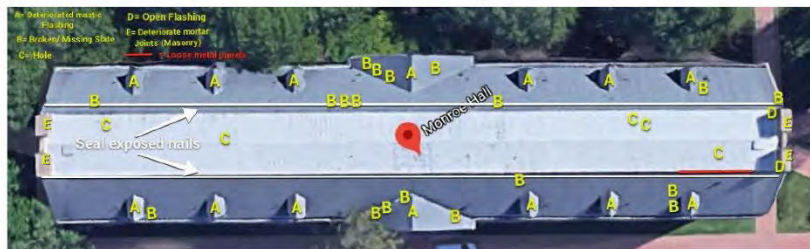
Created by Adam Fletcher

Mar 10, 2021 | 30 Photos



## 226 Richmond Road

Monroe Hall





Aerial view of roof showing all listed deficiencies.

Project: Monroe Hall  
Date: March 10th, 2021, 9:12 a.m.  
Creator: Adam Fletcher



Picture showing leaking interior.

Project: Monroe Hall  
Date: March 5th, 2021, 9:46 a.m.  
Creator: Duver Gonzalez



Picture showing small amount of water staining from attic.

Project: Monroe Hall  
Date: March 5th, 2021, 10:11 a.m.  
Creator: Duver Gonzalez





Picture take from attic interior showing hole in slate roof.

Project: Monroe Hall  
Date: March 5th, 2021, 10:31 a.m.  
Creator: Duver Gonzalez



Picture showing nail hole in metal roof.

Permanent repair: Install metal patch with butyl tape and fasten to roof over hole, Seal metal patch with seam sealer.

Project: Monroe Hall  
Date: March 5th, 2021, 11:49 a.m.  
Creator: Duver Gonzalez



Picture showing nail hole in metal roof.

Permanent repair: Install metal patch with butyl tape and fasten to roof over hole, Seal metal patch with seam sealer.

Project: Monroe Hall  
Date: March 5th, 2021, 11:47 a.m.  
Creator: Duver Gonzalez



Picture showing nail hole in metal roof.

Permanent repair: Install metal patch with butyl tape and fasten to roof over hole, Seal metal patch with seam sealer.

Project: Monroe Hall  
Date: March 5th, 2021, 10:22 a.m.  
Creator: Duver Gonzalez



Picture showing nail hole in metal roof.

Permanent repair: Install metal patch with butyl tape and fasten to roof over hole, Seal metal patch with seam sealer.

Project: Monroe Hall  
Date: March 5th, 2021, 11:47 a.m.  
Creator: Duver Gonzalez



Picture showing nail hole in metal roof.

Permanent repair: Install metal patch with butyl tape and fasten to roof over hole, Seal metal patch with seam sealer.

Project: Monroe Hall  
Date: March 5th, 2021, 12:14 p.m.  
Creator: Duver Gonzalez



Picture showing view of metal roof section.

Deteriorated coating on roof along with other deficiencies. Estimated life of roof 2-4 Years.

Project: Monroe Hall  
Date: March 5th, 2021, 11:44 a.m.  
Creator: Duver Gonzalez



Picture showing area where screws were added at eave of metal roof where metal panels were coming loose due to wind.

Project: Monroe Hall  
Date: March 5th, 2021, 2:00 p.m.  
Creator: Duver Gonzalez



Picture showing seam sealer applied to screws to prevent leaks.

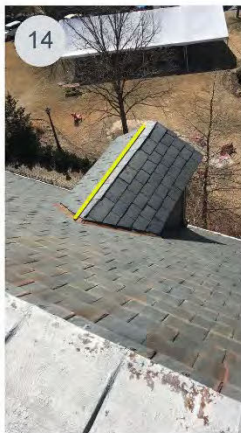
Project: Monroe Hall  
Date: March 5th, 2021, 2:41 p.m.  
Creator: Duver Gonzalez



Picture showing open flashing around chimney.

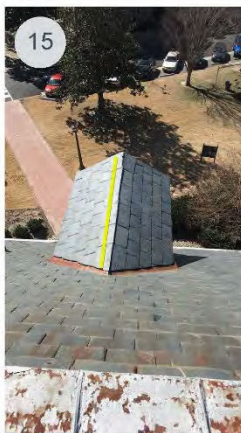
Permanent repair: Install seam sealer on open areas of flashing.

Project: Monroe Hall  
Date: March 5th, 2021, 11:45 a.m.  
Creator: Duver Gonzalez



Picture showing area on dormer ridge where mastic flashing and reinforced fabric is needed.

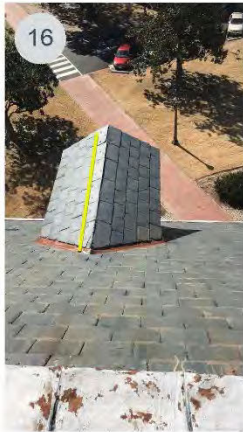
Project: Monroe Hall  
Date: March 5th, 2021, 11:42 a.m.  
Creator: Duver Gonzalez



Picture showing area on dormer ridge where mastic flashing and reinforced fabric is needed.

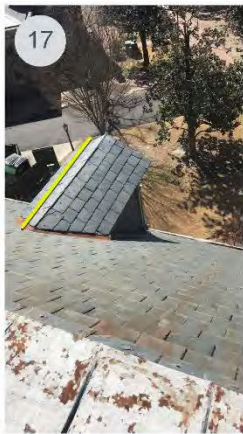
Project: Monroe Hall  
Date: March 5th, 2021, 11:44 a.m.  
Creator: Duver Gonzalez





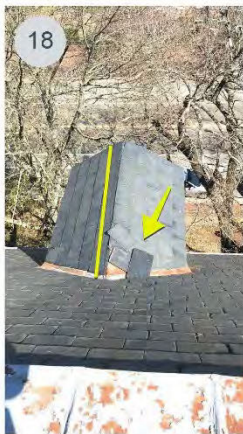
Picture showing area on dormer ridge where mastic flashing and reinforced fabric is needed.

Project: Monroe Hall  
Date: March 5th, 2021, 11:44 a.m.  
Creator: Duver Gonzalez



Picture showing area on dormer ridge where mastic flashing and reinforced fabric is needed.

Project: Monroe Hall  
Date: March 5th, 2021, 11:44 a.m.  
Creator: Duver Gonzalez



Picture showing area on dormer ridge where mastic flashing and reinforced fabric is needed.

Picture also showing loose/ Missing slate on dormer.

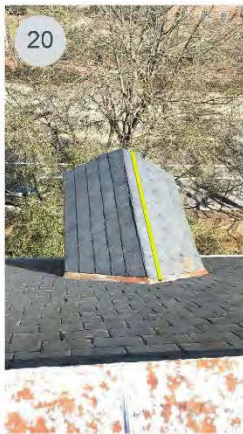
Project: Monroe Hall  
Date: March 5th, 2021, 11:49 a.m.  
Creator: Duver Gonzalez





Picture showing area on dormer ridge where mastic flashing and reinforced fabric is needed.

Project: Monroe Hall  
Date: March 5th, 2021, 11:49 a.m.  
Creator: Duver Gonzalez



Picture showing area on dormer ridge where mastic flashing and reinforced fabric is needed.

Project: Monroe Hall  
Date: March 5th, 2021, 11:49 a.m.  
Creator: Duver Gonzalez



Picture showing loose slate on dormer.

Permanent repair: Install missing slate shingles/ Refasten any loose slate.

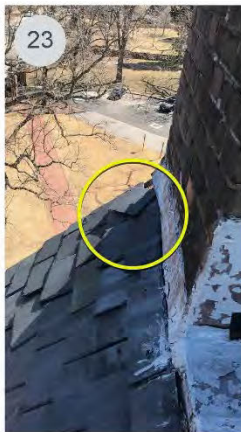
Project: Monroe Hall  
Date: March 5th, 2021, 11:43 a.m.  
Creator: Duver Gonzalez



Picture showing loose slate on dormer.

Permanent repair: Install missing slate shingles/ Refasten any loose slate.

Project: Monroe Hall  
Date: March 5th, 2021, 11:44 a.m.  
Creator: Duver Gonzalez



Picture showing loose slate at headwall of chimney.

Permanent repair: Install missing slate shingles/ Refasten an loose slate.

Project: Monroe Hall  
Date: March 5th, 2021, 11:46 a.m.  
Creator: Duver Gonzalez



Picture showing loose slate near ridge of slate roof.

Permanent repair: Install missing slate shingles/ Refasten an loose slate.

Project: Monroe Hall  
Date: March 5th, 2021, 11:48 a.m.  
Creator: Duver Gonzalez



Picture showing loose slate near ridge of slate roof.

Permanent repair: Install missing slate shingles/ Refasten an loose slate.

Project: Monroe Hall  
Date: March 5th, 2021, 11:50 a.m.  
Creator: Duver Gonzalez



Picture showing area where sealant was applied to exposed nails and gaps on ridge of slate roof.

Project: Monroe Hall  
Date: March 5th, 2021, 1:53 p.m.  
Creator: Duver Gonzalez



Picture showing area where sealant was applied to exposed nails and gaps on ridge of slate roof.

Project: Monroe Hall  
Date: March 5th, 2021, 1:54 p.m.  
Creator: Duver Gonzalez

Exhibit 14: Monroe Hall Inspection Report (Continued)



Picture showing deteriorated mortar joints on chimney.

Permanent repair: Install mortar sealant where needed on deteriorated mortar joints.

Project: Monroe Hall  
Date: March 5th, 2021, 11:45 a.m.  
Creator: Duver Gonzalez



Picture showing deteriorated mortar joints on chimney.

Permanent repair: Install mortar sealant where needed on deteriorated mortar joints.

Project: Monroe Hall  
Date: March 5th, 2021, 11:46 a.m.  
Creator: Duver Gonzalez



Picture showing deteriorated mortar joints on chimney.

Permanent repair: Install mortar sealant where needed on deteriorated mortar joints.

Project: Monroe Hall  
Date: March 5th, 2021, 11:46 a.m.  
Creator: Duver Gonzalez



## EXAMPLES

O. 1. c. Provide examples of recent projects of comparable services that have been completed by your firm. List the dollar amount, time frame, work performed, and contact information.

Below is a list of recent small repair projects which highlight the different types of work we regularly perform. The list does not include clay tile, ballasted or metal, but gives a fair representation of the work we regularly perform.

	Contract Value	Time Frame	Work Performed	Contact Info
20-3800	\$3,173.96	1 day	Slate repair	Rianna Davis-Gaetano rdavis-gaetano@vsu.edu
20-4068	\$3,847.60	2 days	EPDM repair: flashing, puncture repairs, replace pipe boots	Paulette paulette@plumstreetpartners.com
20-4067	\$2,915.78	1 day	EPDM repair: flashing, repair termination bar	Adam Pitts adamp@dodsonpropertymanagement.com
20-4062	\$1,919.56	1 day	Modified Bitumen repair: Install patch over defective seam, Fabricate and install new downspout at low point in gutter system to allow for proper drainage from gutter, Redirect Interior downspout to drain into drain trench	invoices@nascar.com
20-4060	\$2,763.33	1 day	TPO repair: pitch pocket, edge metal, TPO patches	Melissa Proffit Mainstreetpropertiesinc@yahoo.com
20-4050	\$1,156.40	1 day 9/2/21	Asphalt Shingle repair: remove damage shingles, replace damaged decking, apply ice and water, install new shingles	Patrick Connor patrick@picproperties.com
20-4094	\$5,662.00	2 days 9/10/21	EPDM repair: patches over open seams and punctures, remove and replace EPDM from defective areas.	David Gordon degordon@vuu.edu
20-4181	\$1,039.39	1 day 10/4/21	EPDM repair: replaced skylight, flashing around curbing	David White david.white@brookfieldpropertiesmultifamily.com
20-4159	\$1,585.52	1 day 10/7/21	TPO repair: TPO patches, reattach loose gutters, install new dryer vents, install sealant around windows	Adam Pitts adamp@dodsonpropertymanagement.com
20-4086	\$2,139.93	1 day 9/14/21	Gutter Repair, Chimney caps: fabricate and install new chimney caps, install gutter hangers, straighten gutters	Stephanie Scroggins sscroggins@campusapts.com

Examples of TPO, EPDM, Metal, Slate, and Modified Bitumen have been shared in previous sections of this response. Below you will find Examples of:

Exhibit 15: Ballasted Roof Repair

Exhibit 16: Shingle Roof



Adam Fletcher

Roofing Innovations

9/29/2021 | 13 Photos



## 200 West Grace St.



## Repair Photos

1

Aerial view of roof marked with repaired location.



Project: 200 W Grace St  
Date: 9/27/2021, 7:18am  
Creator: Adam Fletcher

2

Before picture showing cut in fabric and coating system over modified bitumen membrane around pipe penetrations.



Project: 200 W Grace St  
Date: 9/27/2021, 1:24pm  
Creator: Wilmer Gonzalez

3



Before picture showing open seam in fabric and coating system over modified bitumen membrane around pipe penetrations.

Project: 200 W Grace St  
Date: 9/27/2021, 1:48pm  
Creator: Wilmer Gonzalez

4



After picture of seam sealer mastic flashing applied to open areas in coating system around pipe penetrations.

Project: 200 W Grace St  
Date: 9/27/2021, 2:32pm  
Creator: Wilmer Gonzalez

5



After picture of seam sealer mastic flashing applied to open areas in coating system around pipe penetrations.

Project: 200 W Grace St  
Date: 9/27/2021, 2:32pm  
Creator: Wilmer Gonzalez

6



After picture of seam sealer mastic flashing applied to open areas in coating system around pipe penetrations.

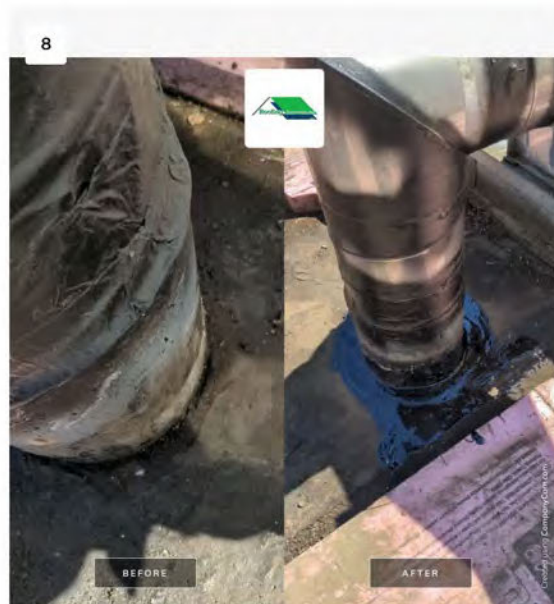
Project: 200 W Grace St  
Date: 9/27/2021, 2:32pm  
Creator: Wilmer Gonzalez





Before picture showing cut in fabric and coating system over modified bitumen membrane around pipe penetrations.

Project: 200 W Grace St  
Date: 9/29/2021, 8:37am  
Creator: Adam Fletcher  
Tags: Before and After



Before and after picture of seam sealer mastic flashing applied to open areas in coating system around pipe penetrations.

Project: 200 W Grace St  
Date: 9/29/2021, 8:38am  
Creator: Adam Fletcher  
Tags: Before and After

9



After picture of HVAC duct caps installed.

Project: 200 W Grace St  
Date: 9/28/2021, 2:39pm  
Creator: Wilmer Gonzalez

10



Before and after picture of HVAC duct caps installed.

Project: 200 W Grace St  
Date: 9/29/2021, 9:12am  
Creator: Adam Fletcher  
Tags: Before and After



Before and after picture of HVAC duct caps installed.



Before and after picture of seam sealer mastic flashing applied to seams on HVAC ducts.

Exhibit 15: Ballasted Roof Repair (Continued)

200 West Grace St.

9/29/2021

13



After picture of Ballast gravel, Insulation board, And fabric matting reinstalled and redistributed evenly across roof system.

Project: 200 W Grace St  
Date: 9/28/2021, 2:17pm  
Creator: Wilmer Gonzalez

Repair Photos

9 / 9

200 W Grace St



Adam Fletcher

Roofing Innovations

9/3/2021 | 7 Photos



## 2470 Mountain View



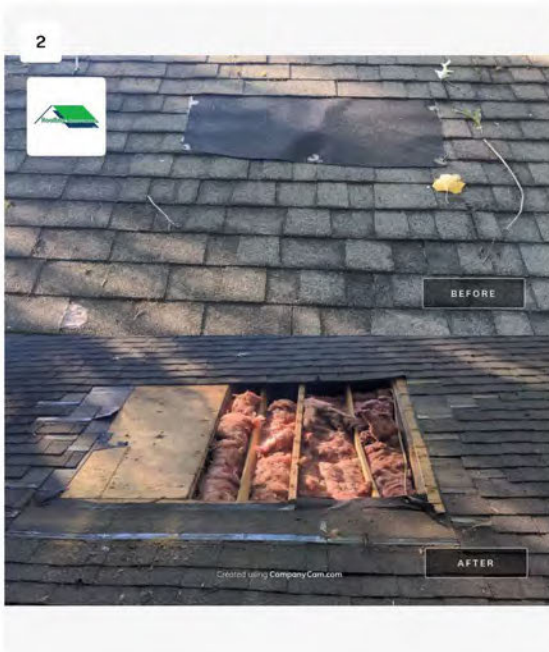


## Repair Photos



Picture showing front of dwelling.

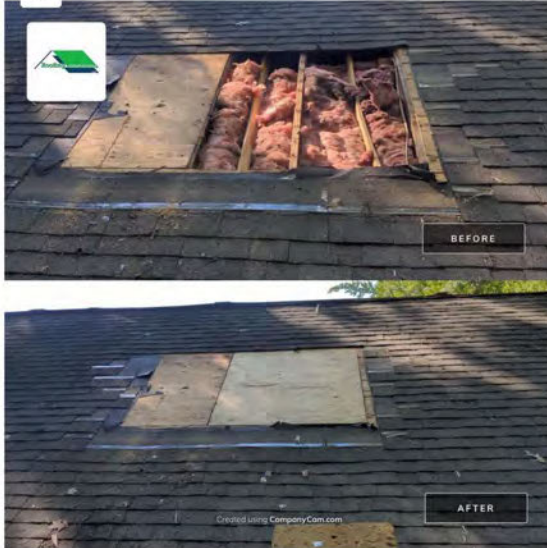
Project: 2470 Mountain View Rd  
Date: 8/12/2021, 9:09am  
Creator: Adam Fletcher



Before and after picture of damaged shingles and sheathing removed.

Project: 2470 Mountain View Rd  
Date: 9/3/2021, 7:47am  
Creator: Adam Fletcher  
Tags: Before and After

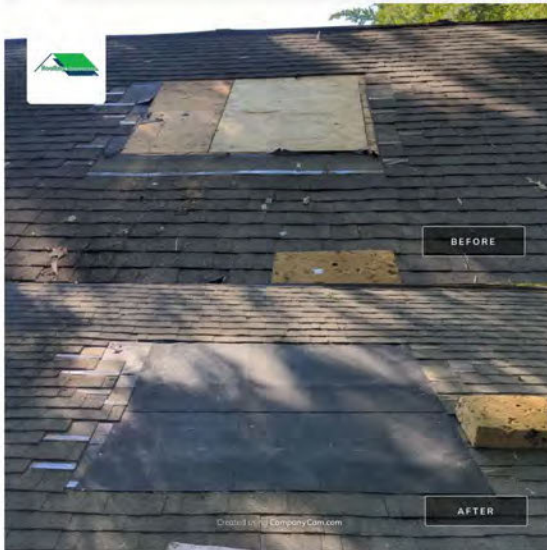
3



Before and after picture of new sheathing installed.

Project: 2470 Mountain View Rd  
Date: 9/3/2021, 7:47am  
Creator: Adam Fletcher  
Tags: Before and After

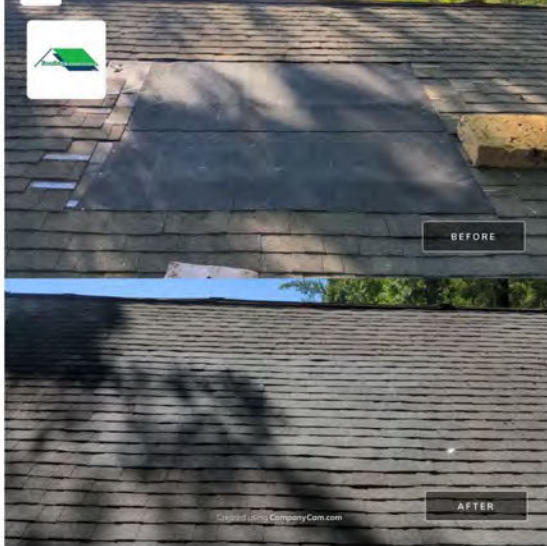
4



Before and after picture of new Ice and water shield underlayment installed over new sheathing.

Project: 2470 Mountain View Rd  
Date: 9/3/2021, 7:47am  
Creator: Adam Fletcher  
Tags: Before and After

5



Before and after picture of new shingles installed to match existing roof system.

Project: 2470 Mountain View Rd  
Date: 9/3/2021, 7:47am  
Creator: Adam Fletcher  
Tags: Before and After

6



After picture of new shingles installed to match existing roof system.


Project: 2470 Mountain View Rd  
Date: 9/2/2021, 11:56am  
Creator: Chuy Montero

Exhibit 16: Asphalt Shingle Repair (Continued)

2470 Mountain View

9/3/2021

7



After picture of new shingles installed to match existing roof system.

Project: 2470 Mountain View Rd  
Date: 9/2/2021, 11:56am  
Creator: Chuy Montero

Repair Photos

6 / 6

2470 Mountain View Rd



## WARRANTY

*O. 1. d. Describe in detail warranty given on all services and materials. Contractor shall be the primary point of contact for warranty responsibility for all equipment, material, and work.*

### Time and Material Repairs:

Roofing Innovations treats “Time and Material” repairs as it would “Permanent Repairs.” The warranty period for materials and workmanship is two years. Should any of the performed work degrade and fail within two years of the Permanent Repair, the company will fix the problem at no charge to the customer.

### Temporary Emergency Repairs:

The warranty for the Temporary Emergency Repairs is a 30-day warranty on the work that we performed. We find deficiencies within a 15-foot radius of the leak area. We temporarily stop the water to prevent further interior damage to the building and to ease the burden for the tenant and property managers. This allows for the building owner to budget and make a plan for the leak area. If the leak area continues to leak within 30 days of the Temporary Emergency Repair, we will return at no charge to the customer.

### Installations (Permanent Repairs):

Permanent repairs are flat-rate fees for addressing specified deficiencies. The warranty period for materials and workmanship is two years. Should any of the performed work degrade and fail within two years of the Permanent Repair, the company will fix the problem at no charge to the customer.

### Replacement:

On full roof replacements, recoveries (overlay of a new single-ply roof system), and restorations (application of a coating on existing membrane) there are differing levels of manufacturers’ warranties available. In the discovery phase of the project, the customer will specify the desired level of warranty that fits their budget and requirements. These range from 10 years to 30 years and cover anywhere from materials only to materials and labor.

The Roofing Innovations warranty on this work is always two years. Any deficiencies noted within that period will be covered by the Company at no charge to the customer. Included in the Roofing Innovations contract is a two-year preventive maintenance plan to ensure all debris and drains are functioning properly. The contract allows us to proactively inspect and ensure that the roof is performing to specifications.

Exhibit 17: Workmanship Warranty

Exhibit 18: Temporary Emergency Repair Program



Roofing Innovations ("RI") warrants to the building owner ("Owner") named below, subject to the terms, conditions, and limitations set forth herein, that for the period in which this warranty is effective, RI will, at its own cost and expense, make or cause to be made such repairs to the RI installed roof on Owner's Building at the address shown below resulting solely from faults or defects in material or workmanship applied by RI and/or its sub-contractors as may be necessary to maintain the installed roof in a watertight conditions.

**Terms, Condition and Limitations**

1. During the term of this warranty, RI shall have access to the roof for inspection during normal business hours.
2. Owner shall obtain RI written approval before making any alterations of the roof or installing any structures, fixtures, or utilities on or through the roof.
3. Owner shall provide RI with written notice of any leak in the roof and of any claim under this warranty within thirty (30) days of the discovery of the leak. Such notice shall be given by certified mail to: Roofing Innovations, P.O. Box 4374, Richmond, VA 23220. If RI investigation of any claim under this warranty reveals that RI is not responsible under the terms of this warranty for Owner's claim. Owner shall promptly reimburse the investigation and repair costs incurred by RI.
4. If there is a leak during the period in which this warranty is in effect caused by a defect in RI workmanship within the scope of this warranty, RI will repair the leak.
5. The remedy stated herein is the SOLE AND EXCLUSIVE REMEDY for failure of the RI installed roof. RI SHALL UNDER NO CIRCUMSTANCES BE LIABLE FOR INCIDENTAL CONSEQUENTIAL DAMAGES INCLUDING BUT NOT LIMITED TO INJURY TO ANY PERSON OR DAMAGES TO THE BUILDING OR THE CONTENTS OF THE BUILDING, INCLUDING ANY SUCH DAMAGES RELATING TO THE PRESENCE OF MOLD, MILDEW OR OTHER PATHOGENIC MICROBE.
6. THERE ARE NO EXPRESS WARRANTIES EXCEPT AS STATED HEREIN, AND RI HEREBY DISCLAIMS THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR PARTICULAR PURPOSE. NO REPRESENTATIVE HAS AUTHORITY TO MAKE ANY REPRESENTATIONS OTHER THAN THOSE STATED HEREIN.
7. This warranty shall not be applicable to damage or loss caused in whole or in part by:
  - a. Natural disasters, including but not limited to lightning, wind gusts in excess of 54 mph, hail, hurricanes, or similar natural disasters;
  - b. Vandalism, acts of war, or civil disturbances;
  - c. Alterations of the roof or installation of structures, fixtures, or utilities on or through the roof without the prior written approval of RI
  - d. Failure by the owner to use reasonable care in maintaining the roof as may be instructed by the original material manufacturer or manufacturers;
  - e. Traffic or storage of materials on the roof;
  - f. Infiltration or condensation of moisture in, through, around or above the walls of the building;
  - g. Acts of parties other than RI ;
  - h. Failure of any materials not provided by RI
  - i. Insects or animals;
  - j. Deterioration or failure of any building component including but not limited to, the roof substrate.
8. RI reserves the right to suspend its obligations under this warranty if all bills for installation of the roof have not been paid in full to RI; Owner fails to reimburse RI for claim investigation cost as provided in paragraph 3 above. Notwithstanding the foregoing, the provisions of paragraph 5 and 6 shall remain in full force and effect.
9. This warranty may not be transferred upon change of ownership of the building shown below unless the Owner Notifies RI in writing of its proposed change at least 45 days prior to the change and RI in turn approves the warranty transfer in writing.
10. Any claim or dispute between Owner and RI arising out of the warranty or relating to any material and/or workmanship provided by RI shall be resolved by final and binding arbitration in accordance with the rules of the American Arbitration Association. Owner hereby releases RI from all liability to Owner's insurance carrier or to anyone claiming under or through Owner by reason of subrogation or otherwise.

**Relationship Manager:** \_\_\_\_\_

**Warranty Issued to:** \_\_\_\_\_

**Project Number:** \_\_\_\_\_

**Job Address:** \_\_\_\_\_

**Repairs Made:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Effective Dates - From:** \_\_\_\_\_

**To:** \_\_\_\_\_

**Authorized Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_



## TEMPORARY EMERGENCY REPAIR

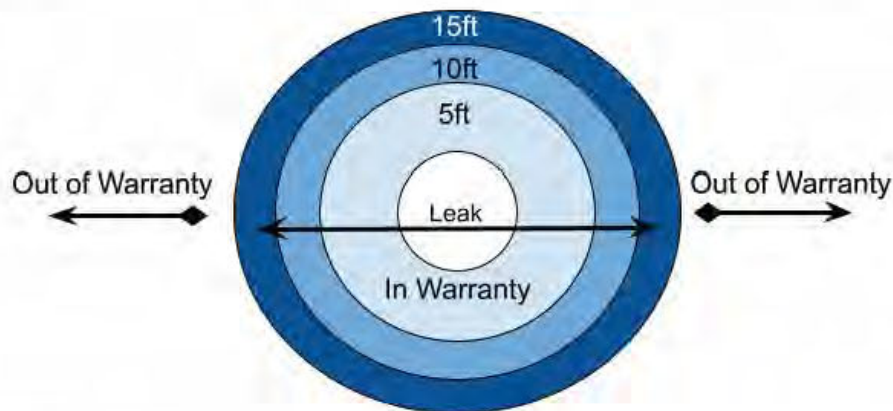
### THE PROGRAM

The Temporary Emergency Repair is designed to stop the water from causing more damage to the building and relieve the Tenant and Property Manager from the headaches of an active leak. The Temporary Emergency Repair is designed to be a rapid-response "band aid" until permanent repairs can be performed.

### PROCEDURES

Our Roof Technician identifies the leak from the inside of the building. From there, photos are taken of the affected area and the Technician finds anchor points (a window, a physical feature, measurement, etc...) to guide them to the same location on the roof.

While on the roof, the Technician uses the anchor points to find the general leak area. The Technician inspects an area within a 15 foot radius of the Leak Area. All potential deficiencies within that 15-foot circle are addressed with a temporary fix that is designed to stop the water but not permanently and professionally repair the deficiency.



### REPORTING

Reporting will be provided on all completed work. Photos will be taken before and after the work is completed. If the Temporary Emergency Repair did not allocate enough time to perform a permanent repair, then a proposal for permanent repairs will be provided. At a minimum, Photos of deficiencies and the Temporary Emergency Repairs will be provided.

---

Roofing Innovations, LLC | 1607 Rhoadmiller St, Ste. A, Richmond, VA 23220  
Office: 804-447-8426 | URL: [roofinginnovation.com](http://roofinginnovation.com)  
Version: 8.2.21



#### WARRANTY

There is a 30-day warranty on our Temporary Emergency Repair. The warranty covers the work that we performed in our search. If the Temporary Emergency Repair does not stop the water from leaking, we will return and inspect the work that was previously done. If we find that our work did not seal up the deficient area, we will honor the warranty and perform the work at no additional charge.

If we return for warranty work and find that our prior work stopped the water, but did not plug the reported leak, then a new Temporary Emergency Repair will be charged to the customer and the process of identifying and addressing deficient areas will start afresh.

#### PROGRAM COSTS

Roofing Innovations establishes a flat rate charge for Temporary Emergency Repairs which is discounted from proposed Permanent Repairs, if those repairs are purchased within 30 days of the proposal. This charge is assessed for each "Leak Call" and allows us to perform enough work to temporarily stop the water, and gives us and the owner time to plan for permanent repairs.

The individual charge for Temporary Emergency Repairs is: \$ \_\_\_\_\_

#### PROGRAM APPROVAL

The following individual is authorized to approve Temporary Emergency Repairs and approves the per use charge listed above. He/She also understands the program and authorizes payment for the work performed.

#### Roofing Innovations

#### Client:

Approved By: \_\_\_\_\_

Approved By: \_\_\_\_\_

Name: \_\_\_\_\_

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

#### ACCOUNTS PAYABLE INFORMATION

Contact Name

Email

Phone

Address

Roofing Innovations, LLC | 1607 Rhoadmiller St, Ste. A, Richmond, VA 23220  
Office: 804-447-8426 | URL: roofinginnovation.com  
Version: 8.2.21



## CERTIFICATIONS & LICENSES

*O. 1. e. Identify and provide copies of all relevant certification and licenses that the contractor and/or employees currently hold.*

Roofing Innovations has expertly worked on all roof types and is a certified installer for GAF and Mulehide, with Sika/Sarnafil coming on soon. Additionally, we are certified to perform repairs for Firestone and Carlyle. We are also member of the National Roofing Contractors Association and employ their training programs to keep our team up to speed on best practices within their areas of expertise.

Certifications and Licenses provided in this document include:

- Exhibit 19: GAF Master Installer
- Exhibit 20: Mulehide Authorized Installer
- Exhibit 21: NRCA Member
- Exhibit 22: SWaM Certification
- Exhibit 23: Business License
- Exhibit 24: eVA Profile
- Exhibit 25: Certificate of Insurance
- Exhibit 26: Contractors License





August 25, 2021

Roofing Innovations LLC  
8516 Sanford Dr  
Henrico, VA 23228  
(804) 869-8165

Subject: Contractor Certification  
ODU

To Whom It May Concern:

This is to confirm that Roofing Innovations LLC of Henrico, VA is a GAF Master Roofing Contractor for Single Ply, United Coatings™, RUBEROID® and GAFGLAS® Roofing Systems. Roofing Innovations LLC is eligible to obtain a GAF Diamond Pledge (NDL) guarantee for up to 20 years provided that all current GAF application and specification requirements are met and procedures followed.

If you have any questions please call 1-800-766-3411. Thank you for choosing GAF.

Sincerely,

A handwritten signature in black ink, appearing to read "James Schnepfer".

James Schnepfer  
President and Chief Executive Officer

A handwritten signature in black ink, appearing to read "Bobby Fischer".

Bobby Fischer  
Vice President, Contractor Programs



# Roofing Innovations LLC

is a Master Commercial Roofing Contractor for GAF


As a GAF Master, this contractor has demonstrated a commitment to installation excellence and continuous education. They have pledged to ensure that each customer receives their best choice in roofing.

GAF ID: 1129455

Valid Through: 12/2021

Member Since: 12/2020

  
Jim Schnepfer  
President and CEO, GAF

  
Bobby Fischer  
VP, Contractor Programs, GAF

Guarantees offered



Designations







**Roofing Innovations  
Richmond, VA**

Is a member in good standing of the National Roofing Contractors Association, adheres to the NRCA Pledge and is committed to promoting professionalism within the roofing industry

**Through August 31, 2022**



Reid Ribble  
Chief Executive Officer

Rod Petrick  
2021-2022 Chairman of the Board

# CERTIFICATION APPLICATION



Tracking Number: 817697

Application Status: Submitted

## Designations and Business type

### Selected Designations

Certification Types	Designation Status
Small Micro	Approved, Pending Review Pending

**Business Type** : LLC

## General Information

**Legal Business Name** : Roofing Innovations LLC

**Trade Name** : -

**Federal EIN** : [REDACTED]

**Social Security Number** : -

**Physical Country** : US

**Physical Address** : 1607 Rhoadmiller St Suite A

**Physical State/Province** : VA

**Physical City** : Richmond

**Physical Zip** : 23220

**Is Mailing Address same as Physical address?** : No

**Mailing Country** : US

**Mailing Address** : PO Box 4374

**Mailing State/Province** : VA

**Mailing City** : Richmond

**Mailing Zip** : 23220

**Is this business registered with eVA?** : Yes





## 2021 CITY OF RICHMOND BUSINESS LICENSE

POST IN PUBLIC VIEW

The person, firm or corporation named below is granted this license pursuant to the provision of the City Code of Ordinances to engage in, carry on or transact the business, trade, calling, profession, exhibition or occupation described below for the period indicated. **It is the responsibility of the applicant/licensee to ensure that his/her business complies with all applicable City codes and the City zoning ordinance. In the event it is determined that the business does not comply, the business license may be revoked by the City.** This license is nontransferable. Please note that it is your responsibility to renew and update this license annually.

No. 46210

**SHALL BE RENEWED BY:**  
*March 01, 2022*

Name: ROOFING INNOVATIONS LLC  
Business Address: 1607 RHOADMILLER ST A RICHMOND, VA 23220  
Business Description: CONTRACTOR  
Owner: ROOFING INNOVATIONS LLC  
Account Number: 1033778



CITY OF RICHMOND • 900 E. BROAD STREET, ROOM 103 • RICHMOND, VA 23219 • [www.richmondgov.com](http://www.richmondgov.com)

Exhibit 24: eVA Profile

**Location Information**  
On this page you may view and modify information specific to your business location. Please select Save when you are finished with your changes. If you ha  
[Save Changes](#) [Cancel](#)

**Location Information**  
Headquarter Standard Name : Roofing Innovations LLC  
Headquarters Account Code :   
Vendor/Customer :   
Virginia Location ID :   
VA Location Standard Name : Roofing Innovations LLC  
Account Status : Active  
\*Location Name :   
DUNS Number :   
Ariba Network ID :   
'AN' plus 11 digits

Classification :   
Number of Employees :   
Annual Income :   
\*Preferred Ordering Method :   
\*Accept Charge Cards? :   
Memorandum of Agreement : Accepted  
[View Memorandum of Agreement](#)


**Attachments**  
[Add your Attachments](#)

Your Attachments : ☒

Delete	File Name	Size	Date	Description	Type of Attachment
	<a href="#">RIW9.pdf</a>	514.76 KB	1/23/20	W-9 Roofing Innovations	W-9

[First](#) [Prev](#) [Next](#) [Last](#)


Exhibit 25: Certificate of Insurance

		<b>CERTIFICATE OF LIABILITY INSURANCE</b>		DATE (MM/DD/YYYY) 10/16/2021	
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.					
<b>IMPORTANT:</b> If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).					
<b>PRODUCER</b> Wade S Dunbar Company Inc 14413 Justice Rd Suite 2 Midlothian VA 23113			<b>CONTACT NAME:</b> Barbara Kellams <b>PHONE (A/C, No, Ext):</b> (804) 378-4650 <b>FAX (A/C, No):</b> (804) 378-7602 <b>E-MAIL ADDRESS:</b> barbara@wsdunbar.com		
<b>INSURED</b> Roofing Innovations, LLC 1607 Rhoadmiller St, Ste A Richmond VA 23220			<b>INSURER(S) AFFORDING COVERAGE</b> <b>INSURER A:</b> Builders Mutual Insurance Co.		<b>NAIC #</b> 10844
			<b>INSURER B:</b>		
			<b>INSURER C:</b>		
			<b>INSURER D:</b>		
			<b>INSURER E:</b>		
			<b>INSURER F:</b>		

<b>COVERAGES</b>		<b>CERTIFICATE NUMBER:</b> 21-22 All		<b>REVISION NUMBER:</b>			
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.							
INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER	Y	Y	CPP0092729 00	06/27/2021	06/27/2022	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	Y	Y	CAP0034103 00	06/27/2021	06/27/2022	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ Underinsured motorist BI \$ 1,000,000
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED \$ RETENTION \$			MUB0018320 00	06/27/2021	06/27/2022	EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000 Retention \$ 10,000
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	Y	WCP1078509 00	06/27/2021	06/27/2022	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)							

<b>CERTIFICATE HOLDER</b> Commonwealth of Virginia James Madison University Procurement Services MSC 5720 752 Ott Street, Wine Price Building First Floor, Suite 1023 Harrisonburg VA 22807	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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**COMMONWEALTH of VIRGINIA**  
 Department of Professional and Occupational Regulation  
 9960 Mayland Drive, Suite 400, Richmond, VA 23233  
 Telephone: (804) 367-8500

**EXPIRES ON**  
 09-30-2023

**NUMBER**  
 2705173006

**BOARD FOR CONTRACTORS**  
**CLASS A CONTRACTOR**  
**\*CLASSIFICATIONS\* ROC**

**ROOFING INNOVATIONS LLC**  
 PO BOX 4374  
 RICHMOND, VA 23220

**DPOR**

*Alamy Proctor*  
 Lic. Broc-Virginia, Director

Status can be verified at <http://www.dpor.virginia.gov>

(SEE REVERSE SIDE FOR PRIVILEGES AND INSTRUCTIONS)

**COMMONWEALTH of VIRGINIA**  
 Department of Professional and Occupational Regulation

**CLASS A BOARD FOR CONTRACTORS**  
**CONTRACTOR**

**\*CLASSIFICATIONS\* ROC**  
**NUMBER: 2705173006 EXPIRES: 09-30-2023**

**ROOFING INNOVATIONS LLC**  
 PO BOX 4374  
 RICHMOND, VA 23220

Status can be verified at <http://www.dpor.virginia.gov>

DPOR-LIC (02/2017)  
 (DETACH HERE)

DPOR-PC (02/2017)

## KEY PERSONNEL

O. 1. f. Provide the names, qualifications, and experience of personnel expected to be assigned to JMU for roofing services. Designate the primary point of contact for this account.

Roofing Innovations is a professionally led service company, specializing in roofing and asset preservation. The Company finds methods to maintain and extend the life of our customers' assets. Below is our organizational chart with their assigned responsibilities.

Team Member	Title & Qualifications	Responsibilities
Rod Young	CEO	Oversight of company direction and strategy.
Mark Babb	COO	Oversight of operations and sales efforts.
Sterling Young	VP Operations	Oversees Project Managers. Manages profitability, quality of work, scope, and delivery.
Hayden Young	Asset Management	Coordination of personnel and equipment.
Adam Fletcher	Project Manager	Establish the scope and pricing of all work. Create roof reports and work documentation.
Jason Price	Superintendent	Management of in-house crews, quality of work, delivery of work.
As Assigned	Senior Roof Technician	The Senior Roof Technician is our roofing expert. This individual is highly skilled in identifying leaks, scoping repairs, and leading on-site work (including managing work of Junior Roof Technicians).
As Assigned	Roof Technician	The Roofing Technician is skilled at roofing but has no supervisory responsibility.
Account Representative	Derek Oates	Serve as primary point of contact with customer to coordinate work orders.

## MOBILIZATION

*O. 1. g. Describe approach to mobilization of management and work staff to meet the needs stated herein. Include how you will meet the needs of fast turnaround projects. Include information on how contractor will meet these needs if your firm is not located in close proximity to JMU.*

Harrisonburg falls within, but lies at the edge of our service area. This distance has not proven impractical or difficult when we employ our proactive two-pronged approach to roof management.

Prong #1: Temporary Emergency Repairs. When leaks occur, the first priority is to stop the water from causing more damage to the building and assuaging the frustration of leaks where students, faculty and staff work. Once the leak is stopped, and an assessment is performed at the time of the leak, the Company provides the Customer with a report outlining what was done to stop the leak, and includes a proposal for further repairs to be completed, if necessary. The Temporary Emergency Repair allows the Customer time to budget and plan for the permanent repair without the worry and hassle of a leaking building. Temporary Emergency Repair pricing is a pre-determined flat rate when the customer joins the program.

Prong #2: Assessment and Planning. The roof assessments provide the basis for yearly roof budgeting and planning. Every department estimates the level of expense needed to perform repairs and maintenance on assets. Our roof assessments, coupled with our severity ranking, allow the customer to allocate resources according to their budget and timeline. We look for ways to extend the useful life of a roof system, thus allowing the Customer to re-roof when they are ready. Based on the Ranking and JMU's plan, we will schedule out work to be completed. This process allows JMU to get in front of leaks before they happen.

## INVOICING

*O. 1. h. Describe invoicing procedure. Provide a sample invoice and proposal.*

Work is approved and signed off on prior to scheduling. Depending on the client, certain information is included on the invoice to facilitate payment. These items may include Purchase Orders, Job Numbers, or submittals on specific forms.

All invoices are due 30 days after they are sent. Invoices are sent via our management software and can be viewed any time by clicking the link in the invoice email. If the Temporary Emergency Repair program is used, that cost will be deducted from the cost for a permanent repair. If an invoice remains unpaid for 31 days after the due date, a 2% finance charge will be added to the invoice, and an additional 2% will be added every 30 days. Additionally, if Roofing Innovations confirms an appointment with the client, and we are unable to access the location at the scheduled date and time of service, a \$100 charge will be billed to cover costs of travel.

A sample invoice is listed below:

Exhibit 27: Sample Invoice – Proposed Work

Exhibit 28: Sample Invoice – Email delivery



**Roofing Innovations LLC**

P.O. Box 4374  
Richmond, Va 23220  
Phone: 804-447-8426  
Fax: 804-447-8429

10/14/2021

**Company Representative**

Derek Oates  
Derek.Oates@RoofingInnovation.com

**Scope of work included**

- Install mastic flashing with reinforced fabric to all defective seams discovered during inspection
- Install granules to match existing roof system over mastic flashing repairs
- Install new sealant to open areas discovered on counter-flashing.

**Robinette Construction - 376**

6050 Technology Creek Drive  
Sandston, VA 23150  
(804) 339-7161

Job: 20-3969: Robinette Construction - 376

**Open Seams**

Karnak 5-Gallon Fibered Waterproofer Cement Roof Sealant

Johns Manville Roof Granules (5 Gal) - White

Karnak 34 Utility Grade Cotton Fabric - 6'x150'

MuleHide JTB1 Joint & Termination Sealant (10 oz) - White

Low Slope Hourly Repair

**\$5,005.55**

**TOTAL**

**\$5,005.55**

**TERMS AND CONDITIONS:**

Advance payment of 50% of the contract price is required on contracts greater than \$5,000. Final payment is to be made at project completion. Should payment not be received, customer agrees to pay all costs of collection, plus attorney's fees and costs related to collections efforts. In addition, customer agrees to a monthly finance charge of 1.5% (with an effective annual interest rate of 18%) to accrue on any unpaid balance.

**CANCELLATION/DELAYS:**

All parties have three (3) business days from the signed contract date to cancel the contract. After the third business day the contract will be executed by Roofing Innovations, LLC. Delays to the agreed upon schedule may occur due to inclement weather and other unforeseeable factors.

**CUSTOMER'S RESPONSIBILITIES:**

- \* Remove or cover articles in attic areas to protect items during work.
- \* Cover articles beneath skylights during work.
- \* Notify contractor of any wiring or covered lines (electrical, air conditioning, refrigeration, T.V. antenna wires, etc.)
- \* Turn off electricity to attic fans.
- \* Keep children and pets at a safe location during the removal and installation process.
- \* Move all vehicles at least 30 feet from the house and waste receptacles.

**DISCLAIMERS:**

- \* Nail pops on the interior of the home may occur as a result of the construction process. The customer is responsible for repairing and painting any nail pops.

Exhibit 27: Sample Invoice - Proposed Work (Continued)

- We are not responsible for any pre-existing damage on the home prior to construction.
- Customer shall remove any satellite dishes from the roof prior to construction. The Customer is responsible for removal and re-installation of satellite dishes.
- We will work around foundation plants as carefully as possible, however, Roofing Innovations is not responsible for damage to foundation plants during the construction process.
- We will reinstall or work around existing gutter guards but cannot guarantee the continuance of any existing warranty.

This Proposal is based on the visual inspection performed by Roofing Innovations. Roofing Innovations assumes no responsibility for latent conditions that are encountered and/or discovered (i.e. rotten wood or other dilapidation), which shall constitute a change in condition and will be subject to issuance of a change order.

Roofing Innovations shall be excused from performing under this Agreement during the period of a force majeure event and shall not be liable for any delay, failure or loss arising from conditions beyond its reasonable control, including without limitation, acts of God or government, civil disobedience, riots, rebellions, wars, terrorism, fires, earthquakes, storms, floods, strikes and lockouts, or other similar events.

This Agreement shall be governed by the laws of the Commonwealth of Virginia. Disputes arising out of this Agreement shall be resolved, at the option of Roofing Innovations, (1) in the Circuit or General District Court of Henrico County, Virginia with customer hereby waiving the right to demand a jury trial; or (2) by arbitration in accordance with the Construction Industry Arbitration Rules of the American Arbitration Association. In the event that Roofing Innovations substantially prevails in such litigation or arbitration, customer shall pay Roofing Innovations its reasonably attorneys' fees and costs incurred.

ROOFING INNOVATIONS SHALL NOT UNDER ANY CIRCUMSTANCE BE LIABLE FOR ANY INCIDENTAL, CONSEQUENTIAL, INDIRECT, PUNITIVE, EXEMPLARY OR SPECIAL DAMAGES, INCLUDING, WITHOUT LIMITATION, LOSS OF USE, DELAYS, LOST BUSINESS OPPORTUNITIES OR LOST PROFITS OR SAVINGS ARISING OUT OF THIS AGREEMENT.

**Proposal is good for 30 days**

\_\_\_\_\_  
Company Authorized Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Customer Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Customer Signature

\_\_\_\_\_  
Date



Roofing Innovations LLC  
Richmond, VA

**Payment Due:**

**\$4,842.67**

Payment Due October 21, 2021

**Customer & Job Location:**

805 North Arthur Ashe Boulevard  
Richmond, VA 23220

**Invoice #: 20-4085-1, Payment Due October 21, 2021**

Please find the invoice for roof repairs completed at 805 North Arthur Ashe Boulevard. I will follow up this email with a roof report of repairs completed.

**Your Roofing Innovations LLC Representative:**

Rob Helsley  
(804) 921-9821

Roofing Innovations LLC | 1607 Rhoadmiller Street | Richmond, VA 23220

## CHANGE ORDERS

*O. 1. i. Describe change order procedure. Provide a sample change order.*

Change orders are necessary when additional work is needed on a project that is outside the agreed upon proposal. Change orders are initiated when a purchaser requests work to be done at an existing project. Roofing Innovations' estimator will then review the proposal and determine if the requested work is in or out of scope. If the work is outside of scope, the estimator will prepare a proposal for a change order, which is then sent to the purchaser. Once the purchaser has agreed to the proposal, we will complete the work as scheduled.

Exhibit 29: Change Order

Adam Fletcher

Roofing Innovations

9/15/2021 | 5 Photos



## 100 S. Arthur Ashe Blvd.



## Rotten Wood



Picture showing area of rotten wood in built in gutter system.

Project: 100 S Arthur Ashe Blvd  
Date: 9/15/2021, 9:34am  
Creator: Kyle Tucker



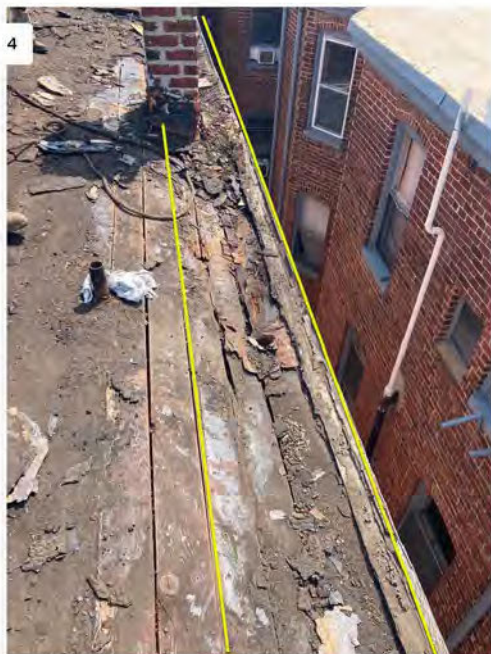
Picture showing hole in roof decking. Rotten decking and rafters throughout built in gutter.

Project: 100 S Arthur Ashe Blvd  
Date: 9/15/2021, 9:34am  
Creator: Kyle Tucker



Picture showing hole in roof decking. Rotten decking and rafters throughout built in gutter.

Project: 100 S Arthur Ashe Blvd  
Date: 9/15/2021, 9:35am  
Creator: Kyle Tucker



Picture showing rotten wood decking throughout built in gutter, Rotten rafters throughout built in gutter

Project: 100 S Arthur Ashe Blvd  
Date: 9/15/2021, 11:51am  
Creator: Adam Fletcher

Exhibit 29: Change Order (Continued)

100 S. Arthur Ashe Blvd.

9/15/2021

5

Picture showing rotten rafter below hole in decking at built in gutter.



Project: 100 S Arthur Ashe Blvd  
Date: 9/15/2021, 11:52am  
Creator: Adam Fletcher

Rotten Wood

5 / 5

100 S Arthur Ashe Blvd



# Exhibit A

09/15/2021



Roofing Innovations, LLC  
P.O. Box 4374  
Richmond, VA 23220  
Phone: 804-447-8426  
Fax: 804-447-8429

Company Representative  
Rob Helsley  
Phone: (804) 921-9821  
rob.helsley@roofinginnovation.com

Replace 50 pieces of 1"x6"x10'  
Replace 12 pieces of 2"x6"x10'  
Make repairs to rafters and built in gutter as needed to install roof

Campus Apartments - D64  
100 South Arthur Ashe Boulevard  
Richmond, VA 23220  
(540) 706-4908

## Production Roofing Section

	\$8,720.01
Sub Total	\$8,720.01
Tax	\$42.19
TOTAL	\$8,762.20

### TERMS AND CONDITIONS:

Advance payment of 50% of the contract price is required on contracts greater than \$5,000. Final payment is to be made at project completion. Should payment not be received, customer agrees to pay all costs of collection, plus attorney's fees and costs related to collections efforts. In addition, customer agrees to a monthly finance charge of 1.5% (with an effective annual interest rate of 18%) to accrue on any unpaid balance.

### CANCELLATION/DELAYS:

All parties have three (3) business days from the signed contract date to cancel the contract. After the third business day the contract will be executed by Roofing Innovations, LLC. Delays to the agreed upon schedule may occur due to inclement weather and other unforeseeable factors.

### CUSTOMER'S RESPONSIBILITIES:

- Remove or cover articles in attic areas to protect items during work
- Cover articles beneath skylights during work
- Notify contractor of any wiring or covered lines (electrical, air conditioning refrigeration, TV antenna wires, etc.)
- Turn off electricity to attic fans
- Keep children and pets at a safe location during the removal and installation process.
- Move all vehicles at least 30 feet from the house and waste receptacles.

### DISCLAIMERS:

- Nail pops on the interior of the home may occur as a result of the construction process. The customer is responsible for repairing and painting any nail pops.
- We are not responsible for any pre-existing damage on the home prior to construction.
- Customer shall remove any satellite dishes from the roof prior to construction. The Customer is responsible for removal and re-installation of satellite dishes.
- We will work around foundation plants as carefully as possible, however, Roofing Innovations is not responsible for damage to foundation.



Exhibit 29: Change Order (Continued)

- plants during the construction process.
- We will reinstall or work around existing gutter guards but cannot guarantee the continuance of any existing warranty.

This Proposal is based on the visual inspection performed by Roofing Innovations. Roofing Innovations assumes no responsibility for latent conditions that are encountered and/or discovered (i.e. rotten wood or other dilapidation), which shall constitute a change in condition and will be subject to issuance of a change order.

Roofing Innovations shall be excused from performing under this Agreement during the period of a force majeure event and shall not be liable for any delay, failure or loss arising from conditions beyond its reasonable control, including without limitation, acts of God or government, civil disobedience, riots, rebellions, wars, terrorism, fires, earthquakes, storms, floods, strikes and lockouts, or other similar events.

This Agreement shall be governed by the laws of the Commonwealth of Virginia. Disputes arising out of this Agreement shall be resolved, at the option of Roofing Innovations, (1) in the Circuit or General District Court of Henrico County, Virginia with customer hereby waiving the right to demand a jury trial; or (2) by arbitration in accordance with the Construction Industry Arbitration Rules of the American Arbitration Association. In the event that Roofing Innovations substantially prevails in such litigation or arbitration, customer shall pay Roofing Innovations its reasonably attorneys' fees and costs incurred.

ROOFING INNOVATIONS SHALL NOT UNDER ANY CIRCUMSTANCE BE LIABLE FOR ANY INCIDENTAL, CONSEQUENTIAL, INDIRECT, PUNITIVE, EXEMPLARY OR SPECIAL DAMAGES, INCLUDING, WITHOUT LIMITATION, LOSS OF USE, DELAYS, LOST BUSINESS OPPORTUNITIES OR LOST PROFITS OR SAVINGS ARISING OUT OF THIS AGREEMENT.

**Proposal is good for 30 days**

\_\_\_\_\_  
Company Authorized Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Customer Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Customer Signature

\_\_\_\_\_  
Date

## OTHER SERVICES

O. 1. j. *Identify other goods and/or services offered to JMU and any associated costs.*

Not Applicable.

## 3- WRITTEN NARRATIVE

### Overview

Roofing Innovations, LLC is a services company specializing in roofing and asset preservation. Our objective is to help our customers extend the life of their roofing asset through strategic repairs and proactive maintenance. We target commercial and institutional customers who manage many roofs and provide a service model that is rarely found within our industry. This service model allows us to operate as an extension of a maintenance departments, with the intent of prolonging and maintaining assets.

### Expertise

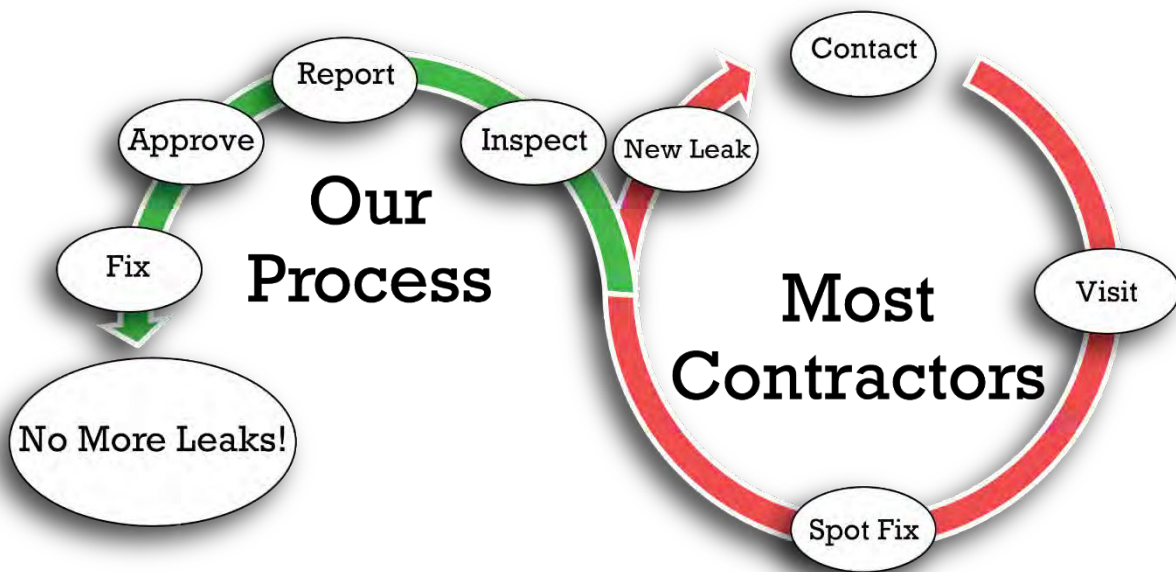
Our company leadership cut their teeth in Real Estate, Public Accounting and Service companies. This foundation has carried over into our roofing with an emphasis on making things easy for our customers, along with proactive roof planning to avoid painful and costly emergency situations.

VENDORS: We have built our business using key vendors who have proven products within the industry. We are certified installers with GAF and Mulehide, and our certification with Sika / Sarnafil is pending. We are cleared to perform repair work on Carlyle and Firestone products but are not currently certified installers. As illustrated in previous sections, our roof reports display our grasp of the roofing trade and our expertise in identifying and correcting deficiencies. Because of this work we have secured manufacturer certifications whenever we have applied. Those certifications were listed in the Certifications Section above.

PERSONNEL: We hire roofing mechanics for their heads, not their backs. Many roofing companies focus on full re-roofs, which are large jobs that require back-breaking removal of roofing materials. It is hard and heavy work. Our Senior Technicians are hired for their roofing knowledge. They have extensive experience working on low slope roofing systems as well as steep slope systems. We then layer onto that knowledge base the National Roofing Contractors Association (NRCA) training and in-field training to ensure they have the capability to diagnose active and potential leaks and perform the proper corrective action. On average, our Senior Roof Technicians have over 15 years experience in roofing and have been with our company since its inception. The longevity of our Senior Roof Technicians is a testament of the benefits of being hired to solve problems over tearing off a worn membrane or a ballasted roof.

PROCESSES: At Roofing Innovations we know that we are hired to be on the roof because most insurance does not allow for internal resources to be there. This lack of visibility for the owner can

cause friction between owners and contractors, so we try to increase visibility and transparency. Our Roof Reports are used to show deficiencies that we have identified and to document how we resolved those deficiencies. We also provide alternatives to replacement so we can place our interests on the side of the building owners and act as a partner and resource in their facility upkeep. When a new roof is actually needed, we help put a plan in place to keep things dry until budget can be secured for the full replacement. We feel that everyone wins when our processes align our interests with that of the building owner.



Our services begin with the Temporary Emergency Repairs. With our customer we determine a pre-determined fixed price for stopping the water from penetrating the building. This flat rate is a temporary fix which allows a team to respond within 48 hours. Stopping the water immediately prevents further damage to the property while removing the headaches of an active leak. Our teams respond within 48 hours so damage is limited. After stopping the water, we evaluate the problem and propose a permanent solution if one is needed. There is a 30-day warranty on temporary emergency repairs.

From the evaluation we prepare a proposal to permanently repair any deficiencies. This is a fixed price proposal which is delivered to the decision maker. With the water stopped, this is a repair that can be scheduled at the customer's convenience. These repairs carry a two-year warranty.

We also provide proactive services to help with budgeting and also to protect the warranty status of roofs. Preventive Roof Maintenance plans are required by manufacturers in order to warrant their products. We provide yearly subscription plans for cleaning roof surfaces, drains and gutters, which keep customers in compliance with manufacturer requirements.

Our Budget and Analysis program groups buildings, assesses their likelihood of water penetration, and ranks them by severity. This ranking allows building owners to prioritize and plan spending on their roofs.

Other variations of this program have been used to determine the resources needed to keep a roof water-tight for the year. This is oftentimes used when an owner is planning for a re-roof within a few years and needs to maintain their roof until it can be replaced.

Full roof replacements are also part of our offering. Working with our customers, we help evaluate appropriate roof systems, budgets and timing. Our team works in concert with facilities to ensure that work is completed on time and within budget.

## Experience

Our experience is well documented in the roof reports that were included in this Response. We documented our work in TPO, EPDM, Slate, Asphalt Shingles, Modified Bitumen, and Ballasted systems. We have successfully performed other work, which did not fit into the scope of this RFP. The Scope of our work ranges from Temporary Emergency repairs at \$350 each to re-roofing large centers for \$350,000. When our interests are aligned with that of our customers, we understand that the smaller jobs are just as pressing and important as a new roof installation.

Our current university client base is made up of The College of William and Mary, Old Dominion University, Virginia State University and Virginia Union University. The Old Dominion University contract was awarded in late September and we are working with their facilities department on an evaluation plan for their highest risk buildings. A similar program is in place at Virginia Union University. We would be happy to place James Madison University in contact with our points of contact for these programs at Old Dominion University and Virginia Union University.

## Specific Resumes of key personnel

Exhibit 30: Rod Young Resume

Exhibit 31: Resume Mark Babb

Exhibit 32: Sterling Young Resume

Exhibit 33: Hayden Young

Exhibit 34: Adam Fletcher

Exhibit 35: Jason Price

# RODNEY YOUNG

## EXPERIENCE

06/2019 – PRESENT

**CEO**, ROOFING INNOVATIONS LLC

CEO of day to day operations as well as establishing strategy for overall company direction. Helped to establish and launch a new business model changing how companies interact with roofing companies across all aspects of industry.

04/1997 – 2018

**DIRECTOR**, DELOITTE LLP

Owned overall relationships with several Fortune 500 clients in the mid-atlantic marketplace. Helped to grow the Capital One Bank relationship from under \$5 mil in client billings to over \$100 mil when retired. Helped to create and lead mid-atlantic BDM growth from \$7mil to over \$250 mil. Helped to establish and grow Deloitte Federal Practice.

01/1995 – 04/1997

**BDM RSM**, MCGLADREY

Lead all business development efforts as well as delivered projects to clients

## EDUCATION

1982

RICHARD BLAND COLLEGE

2003

**BACHELORS DEGREE IN BUSINESS**, DUKE

## SKILLS

- Seasoned leader in business applications of building and running companies
- Excellent interpersonal skills
- Industry leader in sales from 1998-2006
- Extensive experience in negotiation



# MARK BABB

Executive with expertise in enabling the vision of the CEO. Finesse for engaging and coordinating the efforts of the Operations, Marketing, and Finance teams to "row" in the same direction.

Demonstrated success in leading complex, high-stakes projects. The ability to dive deep while governing the inter-connected and broader efforts of the organization. Expertise in shaping initially ambiguous concepts, mapping development and implementation, and driving commercialization through systematic process improvement.

Proven performance defining strategic plan and driving execution on a multi-national level. Start-up founder, taking industry-disruptive ideas and building a culture to support the customer experience.

## EXPERIENCE

**MARCH, 2020 – PRESENT**

**CHIEF OPERATING OFFICER, ROOFING INNOVATIONS, LLC**

Oversight of Operations, leading the charge toward company expansion by defining and refining processes and methodologies. Establish controls and drive sales.

**2016 – MARCH, 2020**

**CONSULTANT, INDEPENDENT**

I help businesses save money and increase their EBITDA through cost reduction and process design. Functioning more as a fractional resource than a consultant, I focus on building a solid financial and operational base for fundraising and company expansion.

- Designed and implemented a sourcing program for an on-line retailer. Established a logistics network for reliable delivery of goods to the company's United States warehouse from overseas manufacturers.
- Established functional requirements, designed operating flows and planned the marketing roll-out of a digital storage service for estate planners.
- Created, implemented and memorialized standard operating processes and controls for \$3MM roofing company.
- Developed and refined customized proformas for start-ups in preparation for fundraising. Proformas created for clients in Transportation, Construction, On-line Storage, Real Estate Investment, Franchise Area Development, Human Resources, Retail (brick & mortar + on-line). Total raised from proformas: \$7.2MM.

**NOVEMBER, 2016 – NOVEMBER, 2019**

**CHIEF OPERATING OFFICER, BLENDED VENTURES**

Start-up client invited me to join their team to launch a Mountain West smoothie brand on the East Coast.

- Secure franchise development rights for 5 states along the East Coast.
- Strategically guided real estate plan, identifying markets, sourcing capital equipment, and directing store openings.
- Defined growth strategy to open 4 corporate locations, then select franchisees for designated territories, provide training, and uphold compliance.

**2012 – 2016**

**CHIEF OPERATING OFFICER, C3NEXUS, LLC**

Led development, testing, and integration of wireless technology to coordinate "healthcare anywhere" for newly-discharged cardiac patients. Patient management solution featured proprietary dashboard to remotely monitor vital signs, weight, and detect abnormal heart activity, compile that data, then issue alerts to notify multi-disciplinary providers: nurses, nutritionists, and social workers to engage with patients. Incorporated nurse triage, physician escalation, and hardware delivery / recovery into process.

- Structured business and revenue models, including pro forma projections, forecasting and budgeting for service that offered no traditional revenue stream.
- Awarded an NIH study with Mayo Clinic to evaluate change in cardiac patients' re-admission rates while utilizing core solution.
- Slashed re-admissions at pilot hospital, Bon Secours Health System, from 20%+ to 4%, avoiding monetary penalties levied under the Affordable Care Act.
- Negotiated license for solution, technology, and processes to Merck subsidiary for national rollout.

**2005 – 2012**

**SENIOR VICE PRESIDENT, INTELITAP, LLC & ASTRUM TEK**

Conceptualized and developed solution to increase draft beer yield 15-30%, and drive sales 10%. Defined operational model and hardware and software development for generations 1 and 2 of the solution. Directed operations teams, including installations and customer service for multi-national roll-outs. Advanced from the roles of *SVP, Operations* and *VP, Research & Development*.

- Raised \$2.5M with a killer business plan and no prototype.
- Delivered hardware cost reductions of 50% and hardware soft costs of 30%.
- Negotiated lucrative merger with Bevinco, a publicly-traded liquor control company based in Toronto, ON.

**2005**

**DIRECTOR, APPLE HOSPITALITY**

Principally guided non-core business operations, and placed sharp, consistent focus on identifying revenue and cost savings opportunities.

- Captured 30% annual savings by initiating regular utility, phone, internet, and solid waste audits.
- Consolidated directors insurance and property & casualty rates across family of 4 Apple REIT companies.

**1999 – 2005**

**VICE PRESIDENT, CORNERSTONE REALTY INCOME TRUST, INC**

Advanced to this role to drive sweeping change management, instituting centralized collections and purchasing departments, and implementing bulk purchasing program. Defined RFP process and leveraged purchasing power of the enterprise to negotiate highly favorable vendor terms. Additionally, steered overhaul of renovations department. Scope further encompassed capital construction: defining strategic direction, leading field coordination, and conducting due diligence. Served as the voice of the company to analysts, investors, and the media. Advanced from the roles of *AVP, Renovations & Purchasing* and *Financial Analyst*. Invited to join CEO's next REIT, Apple Hospitality Two, Inc.

- Created the in-house collections program from ideation through training, roll-out and administration. Revamped credit risk analysis. Slashed write-offs 18% while maintaining occupancy, largely by defining risk tolerances for applicant screening.
- Skyrocketed ancillary revenue from sub-metered utilities from \$500K to \$4+ M in less than 2 years, in a full-scale restructuring.
- Captured 1st year revenue of \$350K, with payback of less than 16 months, by expanding measurement systems to include water, natural gas, electricity, and trash services.

## EDUCATION

1999

**MASTERS IN BUSINESS ADMINISTRATION**, WILLAMETTE UNIVERSITY

1997

**BACHELORS OF ARTS**, BRIGHAM YOUNG UNIVERSITY

# STERLING YOUNG

## EXPERIENCE

MARCH 2021 – PRESENT

**VP, OPERATIONS,** ROOFING INNOVATIONS

Developing and documenting company strategy  
Meeting with operations team to establish and report against weekly, monthly, quarterly goals  
Developing and implementing employee training programs alongside human resources.  
Researching and investigating technology partners to assist with delivery of Roofing Innovations Services.  
Reviewed existing company process map and improve and adjust regularly

NOVEMBER 2019 – MARCH 2021

**BRANCH MANAGER,** ROOFING INNOVATIONS

Maintained and implemented Client Service Satisfaction Surveys.  
Managed all material ordering and labor dispatching  
Maintained and updated company KPI's  
Responsible for project take off, estimation, and profitability  
Project costing to evaluate estimated versus actual project costs.  
Responsible for delivery of yearly and quarterly sales goals and 3 person sales team.  
Responsible for management and training of project managers.  
Reviewed existing company process map and improve and adjust regularly.

JANUARY 2017 – NOVEMBER 2019

**PROJECT MANAGER & HUMAN RESOURCES,** RIVER CITY ROOFING

Perform difficult staffing duties, including dealing with understaffing, refereeing disputes, firing employees, and administering disciplinary procedures.  
Conduct exit interview to identify reasons for employee termination.  
Schedule the project in logical steps and budget time required to meet deadlines.  
Prepare and submit budget estimates, progress reports or cost tracking reports.  
Review time sheets, work charts, wage computation, and other information to detect and reconcile payroll discrepancies.  
Verify attendance, hours worked, and pay adjustments, and post information onto designated records.  
Compile statistical reports, statements, and summaries related to pay and benefits accounts, and submit them to appropriate departments.

JULY 2015 – JANUARY 2017

**ACCOUNTING MANAGER,** RIVER CITY ROOFING

Department lead in 3 person group



Oversaw Accounts Receivable, Accounts Payable, Payroll  
Prepare or direct preparation of financial statements, business activity reports, financial position forecasts, annual budgets, or reports required by regulatory agencies.  
Supervise employees performing financial reporting, accounting, billing, collections, payroll and budgeting duties.  
Analyze the financial detail of past, present and expected operations to identify development opportunities and areas where improvement is needed.

SEPTEMBER 2014 – JULY 2015

**BOOKKEEPER**, RIVER CITY ROOFING

Accounts Payable  
Accounts Receivable  
Payroll

## EDUCATION

MAY 2014

**ECONOMICS**, UNIVERSITY OF VIRGINIA

JUNE 2010

**GENERAL STUDIES**, MONACAN HIGH SCHOOL

It's okay to brag about your GPA, awards, and honors. Feel free to summarize your coursework too.

## SKILLS

- Accounting
- Quickbooks
- Project Management
- Account Reconciliation
- Communication
- Problem Solving
- Roof Budgeting and Management
- Roof life extension
- Account Management
- Roof Composition
- Roof Maintenance Agreements
-



# HAYDEN YOUNG

## EXPERIENCE

JULY 2016 – APRIL 2019

**HUMAN RESOURCES**, RIVER CITY ROOFING

Managed all aspects of compliance, employee management, and asset management

APRIL 2019 – CURRENT

**ASSET MANAGEMENT**, ROOFING INNOVATIONS LLC

Manage coordination of personnel, equipment, and compliance.

## EDUCATION

MAY 2017

**GENERAL STUDIES PROGRAM**, JOHN TYLER COMMUNITY COLLEGE

## SKILLS

- Extensive knowledge of roofing industry
- Adept at all Microsoft, adobe, and other computer programs

# ADAM FLETCHER



## EXPERIENCE

2018 – PRESENT

**PROJECT MANAGER**, ROOFING INNOVATIONS LLC

Project management and estimation. Establish scope and specifications for all work within the company. Completes reporting and documentation for each project.

2016 – 2017

**MECHANIC**, SINGLE PLY SYSTEMS

Low slope, commercial roofing mechanic

2015 – 2016

**STEEL SHINGLE INSTALLER**, SCHMIDT SIDING & WINDOWS

Steel shingle installer

2012 – 2015

**MANAGER, STEEL SHINGLE GROUP**, HEYN BROTHERS ROOFING

Managed schedules, scope and quality of work

## EDUCATION

HIGH SCHOOL DIPLOMA

## SKILLS

- Construction Laborer
- Roofing
- Sheetmetal
- Mechanical
- Carpentry
- Drywall
- Trim Carpentry
- Facilities Maintenance

# JASON PRICE



## EXPERIENCE

OCTOBER, 2021 – PRESENT

**SUPERINTENDENT**, ROOFING INNOVATIONS LLC

Manage work schedules, scope and quality control on service and production crews

SEPTEMBER, 2012 – JULY, 2015

**ROOFER/CARPENTER**, GREEN RIVER ROOFING AND CONSTRUCTION

Roofing and construction – mostly new construction

2008 – 2011

**ROOFER**, BRIAN SIKES ROOFING

Tile, shingles, low slope

1999 – 2006

**ROOFER**, ENGLEMIER ROOFING

Tile, shingles, low slope

## EDUCATION

HIGH SCHOOL DIPLOMA

## SKILLS

- Construction Laborer
- Roofing
- Sheetmetal
- Mechanical
- Carpentry
- Drywall
- Trim Carpentry
- Facilities Maintenance

# 4 - OFFEROR DATA SHEET

## ATTACHMENT A

### ATTACHMENT B

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan  
**Offeror Name:** Roofing Innovations LLC **Preparer Name:** Hayden Young

**Date:** 10/11/2021

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes ☒ No ☐

If yes, certification number: 817697 Certification date: 08/26/2021

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes ☐ No ☐

If yes, certification number:                      Certification date:                     

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes ☐ No ☐

If yes, certification number:                      Certification date:                     

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes ☒ No ☒

If yes, certification number: In Progress Certification date:                     

**Instructions:** *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWaMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

**Small Business:** "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years.

**Woman-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. For purposes of the SWaM Program, all certified women-owned businesses are also a small business enterprise.

**Minority-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. For purposes of the SWaM Program, all certified minority-owned businesses are also a small business enterprise.

**Micro Business** is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees AND no more than \$3 million in average annual revenue over the three-year period prior to their certification.

**All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWaM program. Certification applications are available through SBSD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at <http://www.sbsd.virginia.gov/> (Customer Service).**

***RETURN OF THIS PAGE IS REQUIRED***

# 5 - SMALL BUSINESS SUBCONTRACTING PLAN

## ATTACHMENT B

Exhibit 36: Attachment B



## ATTACHMENT B

### Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

**Offeror Name:** Roofing Innovations LLC

**Preparer Name:** Hayden Young

**Date:** 10/11/2021

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes ☒ No ☐

If yes, certification number: 817697 Certification date: 08/26/2021

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes ☐ No ☐

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes ☐ No ☐

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes ☐ No ☒

If yes, certification number: In Progress Certification date: \_\_\_\_\_

**Instructions:** *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWaMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

**Small Business:** "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years.

**Woman-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

**Minority-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

**Micro Business** is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees **AND** no more than \$3 million in average annual revenue over the three-year period prior to their certification.

**All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at <http://www.sbsd.virginia.gov/> (Customer Service).**

***RETURN OF THIS PAGE IS REQUIRED***

**ATTACHMENT B (CNT'D)**  
Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Procurement Name and Number: James Madison University Date Form Completed: 10/11/2021

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses  
for this Proposal and Subsequent Contract

Offeror / Proposer: Roofing Innovations LLC 1607 Rhoadmiller St, Suite A, Richmond, VA 23220 Hayden Young | 804-447-8426  
Firm Address Contact Person/No.

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)
N/A, See Attached Letter					

*(Form shall be submitted with proposal and if awarded, again with submission of each request for payment)*

**RETURN OF THIS PAGE IS REQUIRED**



1607 Rhoadmiller St. STE A, Richmond, VA 23220  
Office: (804) 447-8426  
Fax: (804) 447-8429

**10/18/2021**

**Re: RFP# MPM-1132 SWaM Utilization Plan**

To Whom it may Concern,

We do not currently have business relationships with any SWaM certified subcontractors or vendors. As a SWaM contractor, we will utilize only in-house crews to perform all roofing work on our projects at JMU. If any representative from JMU is aware of certified vendors or subcontractors in our industry, we are always looking to build new working relationships and would value any recommendations.

Regards,

A handwritten signature in black ink, appearing to read 'Hayden Young'. The signature is fluid and cursive.

Hayden Young, Asset Management

1607 Rhoadmiller St, STE A, Richmond, VA 23220  
P 804-447-8426 -Fax 804-447-8429  
hayden@roofinginnovation.com

## 6 - VASCUPP SALES VOLUME

### OVERVIEW

To date, The College of William & Mary is the only VASCUPP member we have worked with. We expect this number to increase with the addition of Old Dominion University in late September. The contract we were awarded with ODU was not a VASCUPP contract but allows us to work with the university for repairs and maintenance. Our sales volume in the last 12 months is \$87,079.72.

The following Report is included below:

Exhibit 37: VASCUPP Sales Volume



# REPORT

Exhibit 37: VASCUPP Sales Volume

Jobs Report				Report Data
Current Milestone	Job Name	Location Address	Contract Total	Completed Milestone Date
Closed	20-3193: William & Mary - 041	400 Brooks Street, Williamsburg, VA 23188 US	\$0.00	11/23/20
Closed	20-3541: William & Mary - 041	402 Jamestown Road, Williamsburg, VA 23185 US	\$1,801.08	3/15/21
Closed	20-3450: The College of William and Mary	100B Wake Drive, Williamsburg, VA 23188 US	\$1,600.00	2/16/21
Closed	20-3418: William & Mary - 041	700 Landrum Drive, Williamsburg, VA 23185 US	\$1,600.00	2/1/21
Closed	20-3531: William & Mary - 041	651 Ukrop Way, Williamsburg, VA 23188 US	\$820.00	3/8/21
Closed	20-3525: William & Mary - 041	104 Jamestown Road, Williamsburg, VA 23185 US	\$950.00	3/8/21
Closed	20-3509: William & Mary - 041	121 Grigsby Drive, Williamsburg, VA 23185 US	\$0.00	3/4/21
Closed	20-3243: The College of William and Mary-Alumni House	500 Richmond Road, Williamsburg, VA 23185 US	\$3,777.81	12/29/20
Closed	20-3212: The College of William and Mary-Facilities Mgmt Annex	14 Grigsby Drive, Williamsburg, VA 23185 US	\$2,487.58	11/27/20
Closed	20-3477: The College of William and Mary	226 Richmond Road, Williamsburg, VA 23186 US	\$2,150.00	3/11/21
Closed	20-3605: William & Mary - 041	104 Jamestown Road, Williamsburg, VA 23185 US	\$0.00	4/5/21
Closed	20-3020: The College of William and Mary-Bush Field House	600 Brooks Street, Williamsburg, VA 23185 US	\$8,739.40	11/25/20
Closed	20-3321: The College of William and Mary-Sorority house 1	111 Richmond Road, Williamsburg, VA 23185 US	\$2,140.94	12/30/20
Closed	20-3606: William & Mary - 041	700 Ukrop Way, Williamsburg, VA 23185 US	\$0.00	4/8/21
Closed	20-3604: William & Mary - 041	400 Landrum Drive, Williamsburg, VA 23186 US	\$0.00	4/2/21
Closed	20-3498: The College of William and Mary	601 Landrum Drive, Williamsburg, VA 23185 US	\$1,405.00	3/4/21
Closed	20-3181: The College of William and Mary-Patrick Galt Annex	201 Ironbound Road, Williamsburg, VA 23185 US	\$1,290.00	11/19/20
Closed	20-3410: William & Mary - 041	119 Grigsby Drive, Williamsburg, VA 23185 US	\$1,750.80	1/28/21
Closed	20-3945: William & Mary - 041	402 Jamestown Road, Williamsburg, VA 23185 US	\$0.00	7/28/21
Closed	20-3502: William & Mary - 041	400 Landrum Drive, Williamsburg, VA 23186 US	\$0.00	3/15/21
Closed	20-3770: William & Mary - 041	402 Jamestown Road, Williamsburg, VA 23185 US	\$0.00	6/21/21
Closed	20-3503: The College of William and Mary	600 Ukrop Way, Williamsburg, VA 23185 US	\$0.00	2/26/21
Closed	20-3501: The College of William and Mary	100B Wake Drive, Williamsburg, VA 23188 US	\$0.00	2/26/21
Closed	20-3459: The College of William and Mary	700 Landrum Drive, Williamsburg, VA 23185 US	\$1,080.00	2/19/21
Closed	20-3676: William & Mary - 041	613 South Henry Street, Williamsburg, VA 23185 US	\$2,363.90	5/14/21
Closed	20-3638: William & Mary - 041	232 Jamestown Road, Williamsburg, VA 23185 US	\$694.50	5/10/21
Closed	20-3641: William & Mary - 041	400 Landrum Drive, Williamsburg, VA 23186 US	\$4,242.70	5/21/21
Closed	20-3705: Jeff Beattie	232 Jamestown Road, Williamsburg, VA 23186 US	\$12,728.65	6/22/21
Closed	20-3409: William & Mary - 041	600 South Henry Street, Williamsburg, VA 23185 US	\$1,530.10	1/27/21
Closed	20-3441: William & Mary - 041	206 South Boundary Street, Williamsburg, VA 23185 US	\$6,205.67	4/8/21
Closed	20-3612: William & Mary - 041	208 South Boundary Street, Williamsburg, VA 23185 US	\$6,684.10	7/23/21
Closed	20-3809: William & Mary - 041	220 Jamestown Road, Williamsburg, VA 23185 US	\$5,019.52	7/23/21
Closed	20-4142: William & Mary - 041	402 Jamestown Road, Williamsburg, VA 23185 US	\$0.00	9/16/21
Closed	20-4148: William & Mary - 041	400 Landrum Drive, Williamsburg, VA 23186 US	\$0.00	9/16/21
Involved	20-3458: The College of William and Mary	600 Ukrop Way, Williamsburg, VA 23185 US	\$1,080.00	2/17/21
Involved	20-3425: William & Mary - 041	200 Stadium Drive, Williamsburg, VA 23186 US	\$1,080.00	2/4/21
Involved	20-3313: The College of William and Mary-Law School	613 South Henry Street, Williamsburg, VA 23185 US	\$1,486.68	12/17/20
Involved	20-3322: The College of William and Mary-Sorority house 7	129 Richmond Road, Williamsburg, VA 23185 US	\$4,463.10	1/7/21
Involved	20-3426: William & Mary - 041	400 Landrum Drive, Williamsburg, VA 23186 US	\$1,080.00	2/4/21
Involved	20-3808: William & Mary - 041	204 South Boundary Street, Williamsburg, VA 23185 US	\$6,828.19	7/21/21
			Sum	
			\$87,079.72	
Roofing Innovations LLC - Roofing Innovations LLC				



# 7 - PROPOSED COST

## ATTACHMENT C

### Sample Contract

Exhibit 38: Sample Contract

## Exhibit A



Roofing Innovations LLC  
P.O. Box 4374  
Richmond, Va 23220  
Phone: 804-447-8426  
Fax: 804-447-8429

Company Representative  
Rob Helsley  
Phone: (804) 821-9821  
rob.helsley@roofinginnovation.com

09/15/2021

Replace 50 pieces of 1"x6"x10'  
Replace 12 pieces of 2"x6"x10'  
Make repairs to rafters and built in gutter as needed to install roof

Campus Apartments - 064  
100 South Arthur Ashe Boulevard  
Richmond, VA 23220  
(540) 706-4908

### Production Roofing Section

	\$8,720.01
Sub Total	\$8,720.01
Tax	\$42.19
TOTAL	\$8,762.20

#### TERMS AND CONDITIONS:

Advance payment of 50% of the contract price is required on contracts greater than \$5,000. Final payment is to be made at project completion. Should payment not be received, customer agrees to pay all costs of collection, plus attorney's fees and costs related to collections efforts. In addition, customer agrees to a monthly finance charge of 1.5% (with an effective annual interest rate of 18%) to accrue on any unpaid balance.

#### CANCELLATION/DELAYS:

All parties have three (3) business days from the signed contract date to cancel the contract. After the third business day the contract will be executed by Roofing Innovations, LLC. Delays to the agreed upon schedule may occur due to inclement weather and other unforeseeable factors.

#### CUSTOMER'S RESPONSIBILITIES:

- Remove or cover articles in attic areas to protect items during work
- Cover articles beneath skylights during work
- Notify contractor of any wiring or covered lines (electrical, air conditioning refrigeration, TV antenna wires, etc.)
- Turn off electricity to attic fans
- Keep children and pets at a safe location during the removal and installation process.
- Move all vehicles at least 30 feet from the house and waste receptacles.

#### DISCLAIMERS:

- Nail pops on the interior of the home may occur as a result of the construction process. The customer is responsible for repairing and painting any nail pops.
- We are not responsible for any pre-existing damage on the home prior to construction.
- Customer shall remove any satellite dishes from the roof prior to construction. The Customer is responsible for removal and re-installation of satellite dishes.
- We will work around foundation plants as carefully as possible, however, Roofing Innovations is not responsible for damage to foundation.

## Exhibit 38: Sample Contract (Continued)

- plants during the construction process.
- We will reinstall or work around existing gutter guards but cannot guarantee the continuance of any existing warranty.

This Proposal is based on the visual inspection performed by Roofing Innovations. Roofing Innovations assumes no responsibility for latent conditions that are encountered and/or discovered (i.e. rotten wood or other dilapidation), which shall constitute a change in condition and will be subject to issuance of a change order.

Roofing Innovations shall be excused from performing under this Agreement during the period of a force majeure event and shall not be liable for any delay, failure or loss arising from conditions beyond its reasonable control, including without limitation, acts of God or government, civil disobedience, riots, rebellions, wars, terrorism, fires, earthquakes, storms, floods, strikes and lockouts, or other similar events.

This Agreement shall be governed by the laws of the Commonwealth of Virginia. Disputes arising out of this Agreement shall be resolved, at the option of Roofing Innovations, (1) in the Circuit or General District Court of Henrico County, Virginia with customer hereby waiving the right to demand a jury trial; or (2) by arbitration in accordance with the Construction Industry Arbitration Rules of the American Arbitration Association. In the event that Roofing Innovations substantially prevails in such litigation or arbitration, customer shall pay Roofing Innovations its reasonably attorneys' fees and costs incurred.

ROOFING INNOVATIONS SHALL NOT UNDER ANY CIRCUMSTANCE BE LIABLE FOR ANY INCIDENTAL, CONSEQUENTIAL, INDIRECT, PUNITIVE, EXEMPLARY OR SPECIAL DAMAGES, INCLUDING, WITHOUT LIMITATION, LOSS OF USE, DELAYS, LOST BUSINESS OPPORTUNITIES OR LOST PROFITS OR SAVINGS ARISING OUT OF THIS AGREEMENT.

**Proposal is good for 30 days**

\_\_\_\_\_  
Company Authorized Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Customer Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Customer Signature

\_\_\_\_\_  
Date

## ATTACHMENT D: Pricing Schedule by Zone

Specify any associated charge card processing fees, if applicable, to be billed to the university. Vendors shall provide their VISA registration number when indicating charge card processing fees. Any vendor requiring information on VISA registration may refer to <https://usa.visa.com/support/small-business/regulations-fees.html> and for questions <https://usa.visa.com/dam/VCOM/global/support-legal/documents/merchant-surcharging-qa-for-web.pdf>

The following template includes the most common expected labor roles and expenses that the University expects to be provided rates for. Specify all parts and materials discounts, shipping charges, and any other one-time or ongoing costs. Add additional lines, role designations, etc. as needed for your firm's offerings. Labor rates should be inclusive of all expected overhead and additional fees.

PRICING SCHEDULE BY ZONE									
	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
<b>Regular Time Labor Rates (7:30 a.m. to 4:00 p.m. Monday – Friday)*</b>									
Supervisor Labor Rate \$/hour	70	70	70	70	70	70	70	70	70
Laborer Labor Rate \$/hour	70	70	70	70	70	70	70	70	70
Inspector Labor Rate \$/hour	70	70	70	70	70	70	70	70	70
Project Estimator Labor Rate \$/hour	70	70	70	70	70	70	70	70	70
<b>Overtime/Emergency Labor Rates (Outside of Regular Time working hours)*</b>									
Supervisor Labor Rate \$/hour	105	105	105	105	105	105	105	105	105
Laborer Labor Rate \$/hour	105	105	105	105	105	105	105	105	105
Inspector Labor Rate \$/hour	105	105	105	105	105	105	105	105	105
Project Estimator Labor Rate \$/hour	105	105	105	105	105	105	105	105	105
<b>Equipment</b>									
Crane \$/hour	160	160	160	160	160	160	160	160	160
Crane (Daily Mobilization)	0	0	0	0	0	0	0	0	0
Skylift \$/hour	1400/day	1400/day	1400/day	1400/day	1400/day	1400/day	1400/day	1400/day	1400/day
Skylift (Daily Mobilization)	100	100	100	100	100	100	100	100	100
Pressure Wash Fee \$/hour	70	70	70	70	70	70	70	70	70
<b>Other fees/charges</b>									
<b>Charge Card Processing Fees:</b>						<b>%</b>			
						2% transaction fee			



# Request for Proposal

## **RFP# MPM-1132**

**Roofing Inspection, Installation,  
Maintenance, & Replacement**

**September 17, 2021**





# ***REQUEST FOR PROPOSAL***

## ***RFP# MPM-1132***

**Issue Date:** September 17, 2021

**Title:** Roofing Inspection, Installation, Maintenance, & Replacement

**Issuing Agency:** Commonwealth of Virginia  
James Madison University  
Procurement Services MSC 5720  
752 Ott Street, Wine Price Building  
First Floor, Suite 1023  
Harrisonburg, VA 22807

**Period of Contract:** From Date of Award Through One Year (Renewable)

**Sealed Proposals Will Be Received Until 2:00 PM on Tuesday October 19, 2021 for Furnishing The Services Described Herein.**

**MANDATORY/ OPTIONAL PRE-PROPOSAL:** No pre-proposal meeting is required.

*SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.*

All Inquiries For Information And Clarification Should Be Directed To: Michael Morrison, Buyer Senior, Procurement Services, [morrismp@jmu.edu](mailto:morrismp@jmu.edu); 540-568-6181; (Fax) 540-568-7935 not later than five business days before the proposal closing date.

**NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.**

In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

By: \_\_\_\_\_  
*(Signature in Ink)*

Name: \_\_\_\_\_  
*(Please Print)*

Date: \_\_\_\_\_

Title: \_\_\_\_\_

Web Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Fax #: \_\_\_\_\_

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 \_\_\_\_\_ #2 \_\_\_\_\_ #3 \_\_\_\_\_ #4 \_\_\_\_\_ #5 \_\_\_\_\_ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:

☐ YES; ☐ NO; *IF YES* ⇒⇒ ☐ SMALL; ☐ WOMAN; ☐ MINORITY ***IF MINORITY*** ☐ AA; ☐ HA; ☐ AsA; ☐ NW; ☐ Micro

**Note:** This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

# ***REQUEST FOR PROPOSAL***

*RFP # MPM-1132*

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## **I. PURPOSE**

The purpose of this Request for Proposal (RFP) is to solicit sealed proposals from qualified sources to enter into a contract to provide goods and services for Roofing Inspection, Installation, Maintenance, & Replacement for James Madison University (JMU), an agency of the Commonwealth of Virginia. Initial contract shall be for one (1) year with an option to renew for four (4) additional one-year periods.

## **II. BACKGROUND**

James Madison University (JMU) is a comprehensive public institution in Harrisonburg, Virginia with an enrollment of nearly 22,000 students and over 3,000 faculty and staff. There are over 600 individual departments on campus that support seven academic divisions. The University offers over 120 majors, minors, and concentrations. Further information about the University may be found at the following website: <http://www.jmu.edu>.

The JMU campus is 721 acres and includes more than 150 buildings. The University has numerous roofing installations of various ages which will be in need of maintenance and inspection on a regularly scheduled basis.

## **III. SMALL, WOMAN-OWNED AND MINORITY PARTICIPATION**

It is the policy of the Commonwealth of Virginia to contribute to the establishment, preservation, and strengthening of small businesses and businesses owned by women and minorities, and to encourage their participation in State procurement activities. The Commonwealth encourages contractors to provide for the participation of small businesses and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other contractual opportunities. Attachment B contains information on reporting spend data with subcontractors.

## **IV. STATEMENT OF NEEDS**

- A. James Madison University (JMU) seeks to secure the services of contractors with direct experience and expertise to provide campus-wide roofing inspection, installation, maintenance, & replacement on an as-needed basis. The contractor shall furnish all documentation, equipment, insurance, labor, materials, and supervision necessary to provide these services to the University. The contractor shall develop clear, concise, and professional quality proposal quotes for each project for review and acceptance by James Madison University.
- B. JMU reserves the right to obtain other cost estimates prior to authorizing work and to solicit and contract separate and apart from the resultant contract(s) as deemed to be in the best interest of the University. Upon approval of a proposal for a specific project received by the University, a purchase order will be issued as authority to proceed with the work. Contractor shall not perform work or include additional equipment which would result in exceeding the dollar limitation of the purchase order without first having obtained written approval from the University.
- C. Contractor shall be responsible for adhering to all University Design and Construction Guidelines and shall work directly with relevant personnel at the University. Contractor shall be responsible for any measurements, calculations, and other details for each project.

- D. Contractor to perform removal, replacement, maintenance, and repair of roofing materials, including, but not limited to, flashings of all types, asphalt shingle, clay tile, fully-adhered EPDM, ballasted rubber, slate, built up asphaltic materials, metal, and various other types of roofing materials as required. Contractor shall be responsible for ensuring all installations are performed according to specifications, best professional practices, and required standards.
- E. Projects resulting from awarded contracts may also include minor construction and/or repairs to rooftop appurtenances (such as parapet wall, roof vents, and/or cupolas) and may include application of waterproof coatings on various surfaces.
- F. Contractor to perform inspections of existing roofing on an as-needed basis to identify conditions of the existing roofing and related roofing components. All costs for roof inspections shall be estimated by the contractor and provided to the University in a proposal. Inspections may require testing of roofing systems including, but not limited to, confirming roofing materials used; the type, thickness, and attachment method of insulation; type and condition of roof deck; and the location and quantity of insulation. Contractor shall provide a report summarizing current conditions and recommended repairs.
- G. Contractor to inspect gutters, downspouts, and door canopies/overhangs with each roof inspection (or on an as-needed basis) as determined by the University. Contractor shall provide an estimate for all work based on labor rates established through this solicitation. Contractor shall be capable of cleaning entire gutter and downspout systems to include door canopies/overhangs of debris and washing the same clear.
- H. The University shall provide asbestos inspections and abatement activities as require to complete any work. The Contract shall coordinate these activities with the University project manager and consider this coordination in all project proposals and schedules.
- I. Class A Contractor's License is required. Include a copy of license with proposal.
- J. Contractor shall warrant all work and supply written verification of warranty to the University project manager. Warranty requirements shall be provided by the University on a per-job basis for consideration in each project proposal.
- K. Contractor shall comply with all applicable federal, state, local, and University regulations in the performance of work under any resulting contract.
- L. Contractor should have sufficient resources to be able to work multiple jobs at the same time.
- M. The job supervisor and project manager (or project lead if the same person is serving in both capacities) shall be present on the job site during all work.
- N. The University reserves the right to specify precisely the types of materials and methods to be utilized.
- O. Describe in detail your approach to each of the following items and include all associated costs.
  - 1. General
    - a. Describe approach to providing roofing inspection, installation, maintenance, and replacement services to JMU for both large and small scale projects. Include your process, methodology, and work plans.

- b. Describe experience providing roofing inspection, installation, maintenance, and replacement services. Emphasize experience with other higher education institutions.
- c. Provide examples of recent projects of comparable services that have been completed by your firm. List the dollar amount, time frame, work performed, and contact information.
- d. Describe in detail warranty given on all services and materials. Contractor shall be the primary point of contact for warranty responsibility for all equipment, material, and work.
- e. Identify and provide copies of all relevant certification and licenses that the contractor and/or employees currently hold.
- f. Provide the names, qualifications, and experience of personnel expected to be assigned to JMU for roofing services. Designate the primary point of contact for this account.
- g. Describe approach to mobilization of management and work staff to meet the needs stated herein. Include how you will meet the needs of fast turnaround projects. Include information on how contractor will meet these needs if your firm is not located in close proximity to JMU.
- h. Describe invoicing procedure. Provide a sample invoice and proposal.
- i. Describe change order procedure. Provide a sample change order.
- j. Identify other goods and/or services offered to JMU and any associated costs.

## V. PROPOSAL PREPARATION AND SUBMISSION

### A. GENERAL INSTRUCTIONS

**To ensure timely and adequate consideration of your proposal, offerors are to limit all contact, whether verbal or written, pertaining to this RFP to the James Madison University Procurement Office for the duration of this Proposal process. Failure to do so may jeopardize further consideration of Offeror's proposal.**

1. RFP Response: In order to be considered for selection, the **Offeror shall submit a complete response to this RFP**; and shall submit to the issuing Purchasing Agency:
  - a. **One (1) original and two (2) copies** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with 3.f. below.
  - b. **One (1) electronic copy in WORD format or searchable PDF (CD or flash drive)** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with 3.f. below.
  - c. Should the proposal contain **proprietary information**, provide **one (1) redacted hard copy** of the proposal and all attachments with **proprietary portions removed or blacked out**. This copy should be clearly marked "*Redacted Copy*" on the front cover.



The classification of an entire proposal document, line item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable. JMU shall not be responsible for the Contractor's failure to exclude proprietary information from this redacted copy.

No other distribution of the proposal shall be made by the Offeror.

2. The version of the solicitation issued by JMU Procurement Services, as amended by an addenda, is the mandatory controlling version of the document. Any modification of, or additions to, the solicitation by the Offeror shall not modify the official version of the solicitation issued by JMU Procurement services unless accepted in writing by the University. Such modifications or additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, JMU reserves the right to decide, on a case-by-case basis in its sole discretion, whether to reject such a proposal. If the modification or additions are not identified until after the award of the contract, the controlling version of the solicitation document shall still be the official state form issued by Procurement Services.
3. Proposal Preparation
  - a. Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in the purchasing agency requiring prompt submissions of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by the purchasing agency. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.
  - b. Proposals shall be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.
  - c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, sub letter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and sub letter should be repeated at the top of the next page. The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at the appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.
  - d. As used in this RFP, the terms "must", "shall", "should" and "may" identify the criticality of requirements. "Must" and "shall" identify requirements whose absence will have a major negative impact on the suitability of the proposed solution. Items labeled as "should" or "may" are highly desirable, although their absence will not have a large impact and would be useful, but are not necessary. Depending on the overall response to the RFP, some individual "must" and "shall" items may not be fully satisfied, but it is the intent to satisfy most, if not all, "must" and "shall" requirements. The inability of an offeror to satisfy a "must" or "shall" requirement does not

automatically remove that offeror from consideration; however, it may seriously affect the overall rating of the offeror's proposal.

- e. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.
  - f. Ownership of all data, materials and documentation originated and prepared for the State pursuant to the RFP shall belong exclusively to the State and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by the offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the offeror must invoke the protection of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data is submitted. The written notice must specifically identify the data or materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret materials submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and will result in rejection and return of the proposal.
4. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to James Madison University. This provides an opportunity for the Offeror to clarify or elaborate on the proposal. This is a fact-finding and explanation session only and does not include negotiation. James Madison University will schedule the time and location of these presentations. Oral presentations are an option of the University and may or may not be conducted. Therefore, proposals should be complete.

## B. SPECIFIC PROPOSAL INSTRUCTIONS

Proposals should be as thorough and detailed as possible so that James Madison University may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following items as a complete proposal:

- 1. Return RFP cover sheet and all addenda acknowledgements, if any, signed and filled out as required.
- 2. Plan and methodology for providing the goods/services as described in Section IV. Statement of Needs of this Request for Proposal.
- 3. A written narrative statement to include, but not be limited to, the expertise, qualifications, and experience of the firm and resumes of specific personnel to be assigned to perform the work.
- 4. Offeror Data Sheet, included as *Attachment A* to this RFP.
- 5. Small Business Subcontracting Plan, included as *Attachment B* to this RFP. Offeror shall provide a Small Business Subcontracting plan which summarizes the planned utilization of Department of Small Business and Supplier Diversity (SBSD)-certified small businesses which include businesses owned by women and minorities, when they have received Department of Small Business and Supplier Diversity (SBSD) small business certification,

under the contract to be awarded as a result of this solicitation. This is a requirement for all prime contracts in excess of \$100,000 unless no subcontracting opportunities exist.

6. Identify the amount of sales your company had during the last twelve months with each VASCUPP Member Institution. A list of VASCUPP Members can be found at: [www.VASCUPP.org](http://www.VASCUPP.org).
7. Proposed Cost. See Section X. Pricing Schedule of this Request for Proposal.

## **VI. EVALUATION AND AWARD CRITERIA**

### **A. EVALUATION CRITERIA**

Proposals shall be evaluated by James Madison University using the following criteria:

	<u>Points</u>
1. Quality of products/services offered and suitability for intended purposes	30
2. Qualifications and experience of Offeror in providing the goods/services	20
3. Specific plans or methodology to be used to perform the services	20
4. Participation of Small, Women-Owned, & Minority (SWaM) Businesses	10
5. Cost	<u>20</u>
	100

- B. AWARD TO MULTIPLE OFFERORS: Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The Commonwealth reserves the right to make multiple awards as a result of this solicitation. The Commonwealth may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous. Should the Commonwealth determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the contractor's proposal as negotiated.

## VII. GENERAL TERMS AND CONDITIONS

- A. PURCHASING MANUAL: This solicitation is subject to the provisions of the Commonwealth of Virginia's Purchasing Manual for Institutions of Higher Education and Their Vendors and any revisions thereto, which are hereby incorporated into this contract in their entirety. A copy of the manual is available for review at the purchasing office. In addition, the manual may be accessed electronically at <http://www.jmu.edu/procurement> or a copy can be obtained by calling Procurement Services at (540) 568-3145.
- B. APPLICABLE LAWS AND COURTS: This solicitation and any resulting contract shall be governed in all respects by the laws of the Commonwealth of Virginia and any litigation with respect thereto shall be brought in the courts of the Commonwealth. The Contractor shall comply with applicable federal, state and local laws and regulations.
- C. ANTI-DISCRIMINATION: By submitting their proposals, offerors certify to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With Disabilities Act and §10 of the Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 (available for review at <http://www.jmu.edu/procurement>). If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender, sexual orientation, gender identity, or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (*§6 of the Rules Governing Procurement*).

In every contract over \$10,000 the provisions in 1. and 2. below apply:

- 1. During the performance of this contract, the contractor agrees as follows:
  - a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
  - b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.
  - c. Notices, advertisements, and solicitations placed in accordance with federal law, rule, or regulation shall be deemed sufficient for the purpose of meeting these requirements.
- 2. The contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

- D. ETHICS IN PUBLIC CONTRACTING: By submitting their proposals, offerors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other offeror, supplier, manufacturer or subcontractor in connection with their proposal, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.
- E. IMMIGRATION REFORM AND CONTROL ACT OF 1986: By entering into a written contract with the Commonwealth of Virginia, the Contractor certifies that the Contractor does not, and shall not during the performance of the contract for goods and services in the Commonwealth, knowingly employ an unauthorized alien as defined in the federal Immigration Reform and Control Act of 1986.
- F. DEBARMENT STATUS: By submitting their proposals, offerors certify that they are not currently debarred by the Commonwealth of Virginia from submitting proposals on contracts for the type of goods and/or services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.
- G. ANTITRUST: By entering into a contract, the contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under said contract.
- H. MANDATORY USE OF STATE FORM AND TERMS AND CONDITIONS RFPs: Failure to submit a proposal on the official state form provided for that purpose may be a cause for rejection of the proposal. Modification of or additions to the General Terms and Conditions of the solicitation may be cause for rejection of the proposal; however, the Commonwealth reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal.
- I. CLARIFICATION OF TERMS: If any prospective offeror has questions about the specifications or other solicitation documents, the prospective offeror should contact the buyer whose name appears on the face of the solicitation no later than five working days before the due date. Any revisions to the solicitation will be made only by addendum issued by the buyer.
- J. PAYMENT:
1. To Prime Contractor:
    - a. Invoices for items ordered, delivered and accepted shall be submitted by the contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the state contract number and/or purchase order number; social security number (for individual contractors) or the federal employer identification number (for proprietorships, partnerships, and corporations).
    - b. Any payment terms requiring payment in less than 30 days will be regarded as requiring payment 30 days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment in less than 30 days, however.



- c. All goods or services provided under this contract or purchase order, that are to be paid for with public funds, shall be billed by the contractor at the contract price, regardless of which public agency is being billed.
- d. The following shall be deemed to be the date of payment: the date of postmark in all cases where payment is made by mail, or the date of offset when offset proceedings have been instituted as authorized under the Virginia Debt Collection Act.
- e. Unreasonable Charges. Under certain emergency procurements and for most time and material purchases, final job costs cannot be accurately determined at the time orders are placed. In such cases, contractors should be put on notice that final payment in full is contingent on a determination of reasonableness with respect to all invoiced charges. Charges which appear to be unreasonable will be researched and challenged, and that portion of the invoice held in abeyance until a settlement can be reached. Upon determining that invoiced charges are not reasonable, the Commonwealth shall promptly notify the contractor, in writing, as to those charges which it considers unreasonable and the basis for the determination. A contractor may not institute legal action unless a settlement cannot be reached within thirty (30) days of notification. The provisions of this section do not relieve an agency of its prompt payment obligations with respect to those charges which are not in dispute (*Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 § 53; available for review at <http://www.jmu.edu/procurement>*).

2. To Subcontractors:

- a. A contractor awarded a contract under this solicitation is hereby obligated:
    - (1) To pay the subcontractor(s) within seven (7) days of the contractor's receipt of payment from the Commonwealth for the proportionate share of the payment received for work performed by the subcontractor(s) under the contract; or
    - (2) To notify the agency and the subcontractors, in writing, of the contractor's intention to withhold payment and the reason.
  - b. The contractor is obligated to pay the subcontractor(s) interest at the rate of one percent per month (unless otherwise provided under the terms of the contract) on all amounts owed by the contractor that remain unpaid seven (7) days following receipt of payment from the Commonwealth, except for amounts withheld as stated in (2) above. The date of mailing of any payment by U. S. Mail is deemed to be payment to the addressee. These provisions apply to each sub-tier contractor performing under the primary contract. A contractor's obligation to pay an interest charge to a subcontractor may not be construed to be an obligation of the Commonwealth.
3. Each prime contractor who wins an award in which provision of a SWAM procurement plan is a condition to the award, shall deliver to the contracting agency or institution, on or before request for final payment, evidence and certification of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the SWAM procurement plan. Final payment under the contract in question may be withheld until such certification is delivered and, if necessary, confirmed by the agency or institution, or other appropriate penalties may be assessed in lieu of withholding such payment.

4. The Commonwealth of Virginia encourages contractors and subcontractors to accept electronic and credit card payments.
- K. PRECEDENCE OF TERMS: Paragraphs A through J of these General Terms and Conditions and the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors, shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.
- L. QUALIFICATIONS OF OFFERORS: The Commonwealth may make such reasonable investigations as deemed proper and necessary to determine the ability of the offeror to perform the services/furnish the goods and the offeror shall furnish to the Commonwealth all such information and data for this purpose as may be requested. The Commonwealth reserves the right to inspect offeror's physical facilities prior to award to satisfy questions regarding the offeror's capabilities. The Commonwealth further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such offeror fails to satisfy the Commonwealth that such offeror is properly qualified to carry out the obligations of the contract and to provide the services and/or furnish the goods contemplated therein.
- M. TESTING AND INSPECTION: The Commonwealth reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.
- N. ASSIGNMENT OF CONTRACT: A contract shall not be assignable by the contractor in whole or in part without the written consent of the Commonwealth.
- O. CHANGES TO THE CONTRACT: Changes can be made to the contract in any of the following ways:
  1. The parties may agree in writing to modify the scope of the contract. An increase or decrease in the price of the contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the contract.
  2. The Purchasing Agency may order changes within the general scope of the contract at any time by written notice to the contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The contractor shall comply with the notice upon receipt. The contractor shall be compensated for any additional costs incurred as the result of such order and shall give the Purchasing Agency a credit for any savings. Said compensation shall be determined by one of the following methods:
    - a. By mutual agreement between the parties in writing; or
    - b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the contractor accounts for the number of units of work performed, subject to the Purchasing Agency's right to audit the contractor's records and/or to determine the correct number of units independently; or
    - c. By ordering the contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The contractor shall present the Purchasing

Agency with all vouchers and records of expenses incurred and savings realized. The Purchasing Agency shall have the right to audit the records of the contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to the Purchasing Agency within thirty (30) days from the date of receipt of the written order from the Purchasing Agency. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this contract shall excuse the contractor from promptly complying with the changes ordered by the Purchasing Agency or with the performance of the contract generally.

- P. DEFAULT: In case of failure to deliver goods or services in accordance with the contract terms and conditions, the Commonwealth, after due oral or written notice, may procure them from other sources and hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the Commonwealth may have.
- Q. INSURANCE: By signing and submitting a proposal under this solicitation, the offeror certifies that if awarded the contract, it will have the following insurance coverage at the time the contract is awarded. For construction contracts, if any subcontractors are involved, the subcontractor will have workers' compensation insurance in accordance with § 25 of the Rules Governing Procurement – Chapter 2, Exhibit J, Attachment 1, and 65.2-800 et. Seq. of the Code of Virginia (available for review at <http://www.jmu.edu/procurement>) The offeror further certifies that the contractor and any subcontractors will maintain these insurance coverage during the entire term of the contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

MINIMUM INSURANCE COVERAGES AND LIMITS REQUIRED FOR MOST CONTRACTS:

1. Workers' Compensation: Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Commonwealth of increases in the number of employees that change their workers' compensation requirement under the Code of Virginia during the course of the contract shall be in noncompliance with the contract.
2. Employer's Liability: \$100,000
3. Commercial General Liability: \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The Commonwealth of Virginia must be named as an additional insured and so endorsed on the policy.
4. Automobile Liability: \$1,000,000 combined single limit. *(Required only if a motor vehicle not owned by the Commonwealth is to be used in the contract. Contractor must assure that the required coverage is maintained by the Contractor (or third party owner of such motor vehicle.)*

<b>Profession/Service</b>	<b>Limits</b>
Accounting	\$1,000,000 per occurrence; \$3,000,000 aggregate
Architecture	\$2,000,000 per occurrence; \$6,000,000 aggregate
Absestos Design, Inspection, or Abatement Contractors	\$1,000,000 per occurrence; \$3,000,000 aggregate
Health Care Practitioner [to include Dentists, Licensed Dental Hygienists, Optometrists, Registered or Licensed Practical Nurses, Pharmacists, Physicians, Podiatrists, Chiropractors, Physical Therapists, Physical Therapist Assistants, Clinical Psychologists, Clinical Social Workers, Professional Counselors, Hospitals, or Health Maintenance Organizations.]	\$2,450,000 per occurrence; \$4,250,000 aggregate
Limits increase each July 1 through fiscal year 2031. Contractor shall maintain coverage that meets or exceeds statutory limitations in compliance with the <i>Code of Virginia</i> ( <a href="https://law.lis.virginia.gov/vacode/title8.01/chapter21.1/section8.01-581.15/">https://law.lis.virginia.gov/vacode/title8.01/chapter21.1/section8.01-581.15/</a> ) §8.01-581.15.	
Insurance/Risk Management	\$1,000,000 per occurrence; \$3,000,000 aggregate
Landscape/Architecture	\$1,000,000 per occurrence; \$1,000,000 aggregate
Legal	\$1,000,000 per occurrence; \$5,000,000 aggregate
Professional Engineer	\$1,000,000 per occurrence; \$6,000,000 aggregate
Surveying	\$1,000,000 per occurrence; \$1,000,000 aggregate

R. **ANNOUNCEMENT OF AWARD:** Upon the award or the announcement of the decision to award a contract over \$100,000, as a result of this solicitation, the purchasing agency will publicly post such notice on the DGS/DPS eVA web site ([www.eva.virginia.gov](http://www.eva.virginia.gov)) for a minimum of 10 days.

S. **DRUG-FREE WORKPLACE:** During the performance of this contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

For the purposes of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a contractor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

T. **NONDISCRIMINATION OF CONTRACTORS:** An offeror, or contractor shall not be discriminated against in the solicitation or award of this contract because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, faith-based organizational status, any other basis prohibited by state law relating to discrimination in employment or because the offeror employs ex-offenders unless the state agency, department or institution has made a written determination that employing ex-offenders on the specific contract is not in its best interest. If the award of this contract is made to a faith-based

organization and an individual, who applies for or receives goods, services, or disbursements provided pursuant to this contract objects to the religious character of the faith-based organization from which the individual receives or would receive the goods, services, or disbursements, the public body shall offer the individual, within a reasonable period of time after the date of his objection, access to equivalent goods, services, or disbursements from an alternative provider.

- U. eVA BUSINESS TO GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS: The eVA Internet electronic procurement solution, website portal [www.eVA.virginia.gov](http://www.eVA.virginia.gov), streamlines and automates government purchasing activities in the Commonwealth. The eVA portal is the gateway for vendors to conduct business with state agencies and public bodies. All vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet eprocurement solution by completing the free eVA Vendor Registration. All offerors must register in eVA and pay the Vendor Transaction Fees specified below; failure to register will result in the proposal being rejected. Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

1. For orders issued July 1, 2014 and after, the Vendor Transaction Fee is:
    - a. Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$500 per order.
    - b. Businesses that are not Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$1,500 per order.
  2. For orders issued prior to July 1, 2014 the vendor transaction fees can be found at [www.eVA.virginia.gov](http://www.eVA.virginia.gov).
  3. The specified vendor transaction fee will be invoiced by the Commonwealth of Virginia Department of General Services approximately 60 days after the corresponding purchase order is issued and payable 30 days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.
- V. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the Commonwealth of Virginia shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
- W. PRICING CURRENCY: Unless stated otherwise in the solicitation, offerors shall state offered prices in U.S. dollars.
- X. E-VERIFY REQUIREMENT OF ANY CONTRACTOR: Any employer with more than an average of 50 employees for the previous 12 months entering into a contract in excess of \$50,000 with James Madison University to perform work or provide services pursuant to such contract shall register and participate in the E-Verify program to verify information and work authorization of its newly hired employees performing work pursuant to any awarded contract.
- Y. CIVILITY IN STATE WORKPLACES: The contractor shall take all reasonable steps to ensure that no individual, while performing work on behalf of the contractor or any subcontractor in connection with this agreement (each, a "Contract Worker"), shall engage in 1) harassment



(including sexual harassment), bullying, cyber-bullying, or threatening or violent conduct, or 2) discriminatory behavior on the basis of race, sex, color, national origin, religious belief, sexual orientation, gender identity or expression, age, political affiliation, veteran status, or disability.

The contractor shall provide each Contract Worker with a copy of this Section and will require Contract Workers to participate in training on civility in the State workplace. Upon request, the contractor shall provide documentation that each Contract Worker has received such training.

For purposes of this Section, "State workplace" includes any location, permanent or temporary, where a Commonwealth employee performs any work-related duty or is representing his or her agency, as well as surrounding perimeters, parking lots, outside meeting locations, and means of travel to and from these locations. Communications are deemed to occur in a State workplace if the Contract Worker reasonably should know that the phone number, email, or other method of communication is associated with a State workplace or is associated with a person who is a State employee.

The Commonwealth of Virginia may require, at its sole discretion, the removal and replacement of any Contract Worker who the Commonwealth reasonably believes to have violated this Section.

This Section creates obligations solely on the part of the contractor. Employees or other third parties may benefit incidentally from this Section and from training materials or other communications distributed on this topic, but the Parties to this agreement intend this Section to be enforceable solely by the Commonwealth and not by employees or other third parties.

- Z. TAXES: Sales to the Commonwealth of Virginia are normally exempt from State sales tax. State sales and use tax certificates of exemption, Form ST-12, will be issued upon request. Deliveries against this contract shall usually be free of Federal excise and transportation taxes. The Commonwealth's excise tax exemption registration number is 54-73-0076K.

## **VIII. SPECIAL TERMS AND CONDITIONS**

- A. AUDIT: The Contractor hereby agrees to retain all books, records, systems, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The Commonwealth of Virginia, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
- B. CANCELLATION OF CONTRACT: James Madison University reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
- C. IDENTIFICATION OF PROPOSAL ENVELOPE: The signed proposal should be returned in a separate envelope or package, sealed and identified as follows:

From: \_\_\_\_\_

Name of Offeror	Due Date	Time
Street or Box No.	RFP #	
City, State, Zip Code	RFP Title	
Name of Purchasing Officer:		

The envelope should be addressed as directed on the title page of the solicitation.

The Offeror takes the risk that if the envelope is not marked as described above, it may be inadvertently opened and the information compromised, which may cause the proposal to be disqualified. Proposals may be hand-delivered to the designated location in the office issuing the solicitation. No other correspondence or other proposals should be placed in the envelope.

- D. LATE PROPOSALS: To be considered for selection, proposals must be received by the issuing office by the designated date and hour. The official time used in the receipt of proposals is that time on the automatic time stamp machine in the issuing office. Proposals received in the issuing office after the date and hour designated are automatically non responsive and will not be considered. The University is not responsible for delays in the delivery of mail by the U.S. Postal Service, private couriers, or the intra university mail system. It is the sole responsibility of the Offeror to ensure that its proposal reaches the issuing office by the designated date and hour.
- E. UNDERSTANDING OF REQUIREMENTS: It is the responsibility of each offeror to inquire about and clarify any requirements of this solicitation that is not understood. The University will not be bound by oral explanations as to the meaning of specifications or language contained in this solicitation. Therefore, all inquiries deemed to be substantive in nature must be in writing and submitted to the responsible buyer in the Procurement Services Office. Offerors must ensure that written inquiries reach the buyer at least five (5) days prior to the time set for receipt of offerors proposals. A copy of all queries and the respective response will be provided in the form of an addendum to all offerors who have indicated an interest in responding to this solicitation. Your signature on your Offer certifies that you fully understand all facets of this solicitation. These questions may be sent by Fax to 540/568-7935.
- F. RENEWAL OF CONTRACT: This contract may be renewed by the Commonwealth for a period of four (4) successive one year periods under the terms and conditions of the original contract except as stated in 1. and 2. below. Price increases may be negotiated only at the time of renewal. Written notice of the Commonwealth's intention to renew shall be given approximately 90 days prior to the expiration date of each contract period.
1. If the Commonwealth elects to exercise the option to renew the contract for an additional one-year period, the contract price(s) for the additional one year shall not exceed the contract price(s) of the original contract increased/decreased by no more than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
  2. If during any subsequent renewal periods, the Commonwealth elects to exercise the option to renew the contract, the contract price(s) for the subsequent renewal period shall not exceed the contract price(s) of the previous renewal period increased/decreased by more than the percentage increase/decrease of the other services category of the CPI-W section

of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

- G. SUBMISSION OF INVOICES: All invoices shall be submitted within sixty days of contract term expiration for the initial contract period as well as for each subsequent contract renewal period. Any invoices submitted after the sixty day period will not be processed for payment.
- H. OPERATING VEHICLES ON JAMES MADISON UNIVERSITY CAMPUS: Operating vehicles on sidewalks, plazas, and areas heavily used by pedestrians is prohibited. In the unlikely event a driver should find it necessary to drive on James Madison University sidewalks, plazas, and areas heavily used by pedestrians, the driver must yield to pedestrians. For a complete list of parking regulations, please go to [www.jmu.edu/parking](http://www.jmu.edu/parking); or to acquire a service representative parking permit, contact Parking Services at 540.568.3300. The safety of our students, faculty and staff is of paramount importance to us. Accordingly, violators may be charged.
- I. COOPERATIVE PURCHASING / USE OF AGREEMENT BY THIRD PARTIES: It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body, (to include government/state agencies, political subdivisions, etc.), cooperative purchasing organizations, public or private health or educational institutions or any University related foundation and affiliated corporations may access any resulting contract if authorized by the Contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the Contractor(s) and shall fully and independently administer its use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this contract or execution of a separate agreement is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of this contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

The Contractor will notify the University in writing of any such entities accessing this contract. The Contractor will provide semi-annual usage reports for all entities accessing the contract. The University shall not be held liable for any costs or damages incurred by any other participating entity as a result of any authorization by the Contractor to extend the contract. It is understood and agreed that the University is not responsible for the acts or omissions of any entity and will not be considered in default of the contract no matter the circumstances.

Use of this contract(s) does not preclude any participating entity from using other contracts or competitive processes as needed.

- J. SMALL BUSINESS SUBCONTRACTING AND EVIDENCE OF COMPLIANCE:
  - 1. It is the goal of the Commonwealth that 42% of its purchases are made from small businesses. This includes discretionary spending in prime contracts and subcontracts. All potential offerors are required to submit a Small Business Subcontracting Plan. Unless the offeror is registered as a Department of Small Business and Supplier Diversity (SBSD)-certified small business and where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the contractor is encouraged to offer such

subcontracting opportunities to SBSB-certified small businesses. This shall not exclude SBSB-certified women-owned and minority-owned businesses when they have received SBSB small business certification. No offeror or subcontractor shall be considered a Small Business, a Women-Owned Business or a Minority-Owned Business unless certified as such by the Department of Small Business and Supplier Diversity (SBSB) by the due date for receipt of proposals. If small business subcontractors are used, the prime contractor agrees to report the use of small business subcontractors by providing the purchasing office at a minimum the following information: name of small business with the SBSB certification number or FEIN, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product/service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.**

2. Each prime contractor who wins an award in which provision of a small business subcontracting plan is a condition of the award, shall deliver to the contracting agency or institution with every request for payment, evidence of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the small business subcontracting plan. **This information shall be submitted to: JMU Office of Procurement Services, SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.** When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm with the Department of Small Business and Supplier Diversity (SBSB) certification number or FEIN number, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product or service provided. Payment(s) may be withheld until compliance with the plan is received and confirmed by the agency or institution. The agency or institution reserves the right to pursue other appropriate remedies to include, but not be limited to, termination for default.
  3. Each prime contractor who wins an award valued over \$200,000 shall deliver to the contracting agency or institution with every request for payment, information on use of subcontractors that are not Department of Small Business and Supplier Diversity (SBSB)-certified small businesses. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm, phone number, FEIN number, total dollar amount subcontracted, and type of product or service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807.**
- K. AUTHORIZATION TO CONDUCT BUSINESS IN THE COMMONWEALTH: A contractor organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the Code of Virginia or as otherwise required by law. Any business entity described above that enters into a contract with a public body shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the contract. A public body may void any contract with a business entity if the business entity fails to remain in compliance with the provisions of this section.
- L. PUBLIC POSTING OF COOPERATIVE CONTRACTS: James Madison University maintains a web-based contracts database with a public gateway access. Any resulting

cooperative contract/s to this solicitation will be posted to the publicly accessible website. Contents identified as proprietary information will not be made public.

- M. CRIMINAL BACKGROUND CHECKS OF PERSONNEL ASSIGNED BY CONTRACTOR TO PERFORM WORK ON JMU PROPERTY: The Contractor shall obtain criminal background checks on all of their contracted employees who will be assigned to perform services on James Madison University property. The results of the background checks will be directed solely to the Contractor. The Contractor bears responsibility for confirming to the University contract administrator that the background checks have been completed prior to work being performed by their employees or subcontractors. The Contractor shall only assign to work on the University campus those individuals whom it deems qualified and permissible based on the results of completed background checks. Notwithstanding any other provision herein, and to ensure the safety of students, faculty, staff and facilities, James Madison University reserves the right to approve or disapprove any contract employee that will work on JMU property. Disapproval by the University will solely apply to JMU property and should have no bearing on the Contractor's employment of an individual outside of James Madison University.
- N. INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the contractor/any services of any kind or nature furnished by the contractor, provided that such liability is not attributable to the sole negligence of the using agency or to failure of the using agency to use the materials, goods, or equipment in the manner already and permanently described by the contractor on the materials, goods or equipment delivered.
- O. ADDITIONAL GOODS AND SERVICES: The University may acquire other goods or services that the supplier provides than those specifically solicited. The University reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services under the same pricing, terms, and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products, components, accessories, subsystems, or related services that are newly introduced during the term of this Agreement. Such additional goods and services will be provided to the University at favored nations pricing, terms, and conditions.
- P. ADVERTISING: In the event a contract is awarded for supplies, equipment, or services resulting from this proposal, no indication of such sales or services to James Madison University will be used in product literature or advertising without the express written consent of the University. The contractor shall not state in any of its advertising or product literature that James Madison University has purchased or uses any of its products or services, and the contractor shall not include James Madison University in any client list in advertising and promotional materials without the express written consent of the University.
- Q. ELECTRICAL EQUIPMENT STANDARDS: All equipment/material shall conform to the latest issue of all applicable standards as established by National Electrical Manufacturer's Association (NEMA), American National Standards Institute (ANSI), and Occupational Safety & Health Administration (OSHA). All equipment and material, for which there are OSHA standards, shall bear an appropriate label of approval for use intended from a Nationally Recognized Testing Laboratory (NRTL).
- R. AS BUILT DRAWINGS: The contractor shall provide the University a clean set of reproducible "as built" drawings and wiring diagrams, marked to record all changes made



during installation or construction. The contractor shall also provide the University with maintenance manuals, parts lists, and a copy of all warranties for all equipment. All “as built” drawings, wiring diagrams, maintenance manuals, parts lists, and warranties shall be delivered to the University upon completion of the work and prior to final payment.

- S. CONTRACTOR’S TITLE TO MATERIALS: No materials or supplies for the work shall be purchased by the contractor or by any subcontractor subject to any chattel mortgage or under a conditional sales or other agreement by which an interest is retained by the seller. The contractor warrants that they have clear title to all materials and supplies for which they invoice for payment.
- T. FINAL INSPECTION: At the conclusion of the work, the contractor shall demonstrate to the authorized owner’s representative that the work is fully operational and in compliance with contract specification and codes. Any deficiencies shall be promptly and permanently corrected by the contractor at the contractor’s sole expense prior to final acceptance of the work.
- U. KEYS: If the contractor is given keys for this project, it is the contractor’s responsibility to return the keys when the contract is terminated, as well as for safekeeping of the keys during the contract period. The contract shall not loan or duplicate the keys. In the event the contractor loses the keys, they will be charged for the replacement of the keys and any locks which are rekeyed or replaced.
- V. LIQUIDATED/ACTUAL DAMAGES, FURNISH AND INSTALL: Work shall begin after receipt of purchase order or contract and all work shall be completed no later than the agreed upon date. It is hereby understood and agreed by the bidder that time is of the essence in the delivery of supplies, services, materials, or equipment of the character and quality specified in the bid document. In the event these specified supplies, services, materials, or equipment are not delivered by the date specified, there will be deducted, not as a penalty but as liquidated and/or actual damages, the sum of \$ 500.00 per day for each and every calendar day of delay beyond the time specified; except that if the delivery be delayed by any act, negligence, or default on the part of the Commonwealth, public enemy, war, embargo, fire, or explosion not caused by the negligence or intentional act of the contractor or his supplier(s), or by riot, sabotage, or labor trouble that results from a cause or causes entirely beyond the control or fault of the contractor or his supplier(s), a reasonable extension of time as the procuring public body deems appropriate may be granted. Upon receipt of a written request and justification for an extension from the contractor, the purchasing office may extend the time for performance of the contract or delivery of goods herein specified at the purchasing office’s sole discretion for good cause shown.
- W. PRIME CONTRACTOR RESPONSIBILITIES: The contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that they may utilize, using their best skill and attention. Subcontractors who perform work under this contract shall be responsible to the prime contractor. The contractor agrees that they are as fully responsible for the acts and omissions of their subcontractors and of persons employed by them as they are for the acts and omissions of their own employees.
- X. RETAINAGE: The Owner may withhold as retainage an amount not exceeding 5% of the contract dollar value. Retainage will be released upon project completion and all documentation/invoicing (as-built drawings, SWaM/Subcontracting Plan, etc.) has been submitted to the owner.
- Y. STANDARDS OF CONDUCT: Work sites under this contract will be occupied by students and University personnel during times when work is performed. Contractor and contractor’s

personnel shall exercise a particularly high level of discipline, safety, and cooperation at all times while on any job site. The contractor shall be responsible for controlling employee conduct, for assuring that its employees are not boisterous or rude, and ensuring that they are not engaging in any destructive or criminal activity. The contractor is also responsible for ensuring that its employees do not disturb papers on desks, open desk drawers, cabinets, briefcases, or use University phones, and the like, except as authorized.

- Z. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent of the University. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish the University the names, qualifications, and experience of their proposed subcontractors. The contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of the contract.
- AA. WORK SITE DAMAGES: Any damage to existing utilities, equipment, or finished surfaces resulting from the performance of this contract shall be repaired to the University's satisfaction at the contractor's expense.
- BB. WORK ESTIMATES (TIME AND MATERIAL CONTRACTS): Under this time and material contract, the contractor shall furnish the agency with a non-binding written estimate of the total costs to complete the work required. The estimate must include the labor category(ies), the contractor's hourly rates specified in the contract, and the total material cost. Material costs shall be billed at contractor's actual invoice costs (contractor shall furnish copies of all invoices for materials) or discount off the list price, whichever is specified in the contract. If the agency determines that the estimated price is not fair and reasonable, the agency has the right to ask the contractor to reevaluate the estimate. If the revised estimate is determined to be not fair and reasonable, the agency reserves the right to obtain additional quotes from other vendors. A work order will be issued to the contractor, as the authority to proceed with the work, which will incorporate the contractor's estimate and the terms and conditions of the contract. The contractor and his/her personnel shall log in with the designated contract administrator each day before and after work to confirm labor hours.

## **IX. METHOD OF PAYMENT**

The contractor will be paid based on invoices submitted in accordance with the solicitation and any negotiations. James Madison University recognizes the importance of expediting the payment process for our vendors and suppliers; we request that our vendors and suppliers enroll in our bank's Comprehensive Payable options: either the Virtual Payables Virtual Card or the PayMode-X electronic deposit (ACH) to your bank account so that future payments are made electronically. Contractors signed up for the Virtual Payables process will receive the benefit of being paid Net 15. Additional information is available online at:

<http://www.jmu.edu/financeoffice/accounting-operations-disbursements/cash-investments/vendor-payment-methods.shtml>

## **X. PRICING SCHEDULE**

The offeror shall provide pricing for all products and services included in proposal indicating one-time and on-going costs. The resulting contract will be cooperative and pricing shall be inclusive for the attached Zone Map, of which JMU falls within Zone 2.

Specify any associated charge card processing fees, if applicable, to be billed to the university. Vendors shall provide their VISA registration number when indicating charge card processing fees. Any vendor requiring information on VISA registration may refer to <https://usa.visa.com/support/small-business/regulations-fees.html> and for questions <https://usa.visa.com/dam/VCOM/global/support-legal/documents/merchant-surcharging-qa-for-web.pdf>.

The following template includes the most common expected labor roles and expenses that the University expects to be provided rates for. Specify all parts and materials discounts, shipping charges, and any other one-time or ongoing costs. Add additional lines, role designations, etc. as needed for your firm's offerings. Labor rates should be inclusive of all expected overhead and additional fees.

	<b>PRICING SCHEDULE BY ZONE</b>													
	<i>Zone 1</i>	<i>Zone 2</i>	<i>Zone 3</i>	<i>Zone 4</i>	<i>Zone 5</i>	<i>Zone 6</i>	<i>Zone 7</i>	<i>Zone 8</i>	<i>Zone 9</i>					
<b>Regular Time Labor Rates (7:30 a.m. to 4:00 p.m. Monday – Friday)*</b>														
Supervisor Labor Rate \$/hour														
Laborer Labor Rate \$/hour														
Inspector Labor Rate \$/hour														
Project Estimator Labor Rate \$/hour														
<b>Overtime/Emergency Labor Rates (Outside of Regular Time working hours)*</b>														
Supervisor Labor Rate \$/hour														
Laborer Labor Rate \$/hour														
Inspector Labor Rate \$/hour														
Project Estimator Labor Rate \$/hour														
<b>Equipment</b>														
Crane \$/hour														
Crane (Daily Mobilization)														
Skylift \$/hour														
Skylift (Daily Mobilization)														
Pressure Wash Fee \$/hour														
<b>Other fees/charges</b>														
<b>Charge Card Processing Fees:</b>					<b>%</b>									

## **XI. ATTACHMENTS**

Attachment A: Offeror Data Sheet

Attachment B: Small, Women, and Minority-owned Business (SWaM) Utilization Plan

Attachment C: Standard Contract Sample

Attachment D: Zone Map

Attachment E: [JMU Design and Construction Guidelines](#) (separate attachment)

Attachment F: JMU Roofing Standard Proposal Form (separate attachment)

## ATTACHMENT A

### OFFEROR DATA SHEET

#### TO BE COMPLETED BY OFFEROR

1. QUALIFICATIONS OF OFFEROR: Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.
2. YEARS IN BUSINESS: Indicate the length of time you have been in business providing these types of goods and services.

Years \_\_\_\_\_ Months \_\_\_\_\_

3. REFERENCES: Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

CLIENT	LENGTH OF SERVICE	ADDRESS	CONTACT PERSON/PHONE #
--------	-------------------	---------	---------------------------

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

_____
_____
_____
_____

5. RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA: Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the [CODE OF VIRGINIA](#), SECTION 2.2-3100 – 3131?

[ ] YES [ ] NO

IF YES, EXPLAIN: \_\_\_\_\_

_____
_____
_____



## ATTACHMENT B

### Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

**Offeror Name:** \_\_\_\_\_ **Preparer Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, certification number: \_\_\_\_\_ Certification date: \_\_\_\_\_

**Instructions:** *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWAMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

**Small Business:** "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years.

**Woman-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

**Minority-Owned Business Enterprise:** A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

**Micro Business** is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees **AND** no more than \$3 million in average annual revenue over the three-year period prior to their certification.

**All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at <http://www.sbsd.virginia.gov/> (Customer Service).**

***RETURN OF THIS PAGE IS REQUIRED***

**ATTACHMENT B (CNT'D)**  
Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Procurement Name and Number: \_\_\_\_\_

Date Form Completed: \_\_\_\_\_

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses  
for this Proposal and Subsequent Contract

Offeror / Proposer: \_\_\_\_\_

\_\_\_\_\_  
Firm

\_\_\_\_\_  
Address

\_\_\_\_\_  
Contact Person/No.

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)

*(Form shall be submitted with proposal and if awarded, again with submission of each request for payment)*

***RETURN OF THIS PAGE IS REQUIRED***

ATTACHMENT C



**COMMONWEALTH OF VIRGINIA  
STANDARD CONTRACT**

Contract No. \_\_\_\_\_

This contract entered into this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by \_\_\_\_\_ hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE From \_\_\_\_\_ through \_\_\_\_\_

The contract documents shall consist of:

- (1) This signed form;
- (2) The following portions of the Request for Proposals dated \_\_\_\_\_:
  - (a) The Statement of Needs,
  - (b) The General Terms and Conditions,
  - (c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
  - (d) List each addendum that may be issued
- (3) The Contractor's Proposal dated \_\_\_\_\_ and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
  - (a) Negotiations summary dated \_\_\_\_\_.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:

PURCHASING AGENCY:

By: \_\_\_\_\_  
(Signature)

By: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Printed Name)

\_\_\_\_\_  
(Printed Name)

Title: \_\_\_\_\_

Title: \_\_\_\_\_

## ATTACHMENT D

### Zone Map



## Virginia Association of State College & University Purchasing Professionals (VASCUPP)

### List of member institutions by zones

<b><u>Zone 1</u></b> George Mason University (Fairfax)	<b><u>Zone 2</u></b> James Madison University (Harrisonburg)	<b><u>Zone 3</u></b> University of Virginia (Charlottesville)
<b><u>Zone 4</u></b> University of Mary Washington (Fredericksburg)	<b><u>Zone 5</u></b> College of William and Mary (Williamsburg) Old Dominion University (Norfolk)	<b><u>Zone 6</u></b> Virginia Commonwealth University (Richmond)
<b><u>Zone 7</u></b> Longwood University (Farmville)	<b><u>Zone 8</u></b> Virginia Military Institute (Lexington) Virginia Tech (Blacksburg) Radford University (Radford)	<b><u>Zone 9</u></b> University of Virginia - Wise (Wise)