



Center for Procurement Excellence

FORM-5520[©]

Request For Proposal Roofing Services

<<INSERT ORGANIZATION NAME>>
<<INSERT PROJECT NAME>>

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<<INSERT ORGANIZATION NAME>>

Request For Proposal

Roofing Services

<< Insert Project Name >>

RFP Number: <<Insert RFP Project Number>>

RFP Release Date: <<Date>>

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SECTION 1

STATEMENT OF WORK

1.1 PROJECT SUMMARY

The Owner is soliciting proposals for (insert 1 sentence that briefly describes the scope of work. Try to describe at a very high-level and avoid any technical language or specifics. Should be brief and explain the goods or services sought or a summary of the problem to be addressed. Note that the project details / technical requirements will be described in a later portion of this Section). Include the estimated roof area to be roofed (i.e. 50,000 SF)

1.2 BUDGET

Clearly define any financial constraints or expectations that you have. Such as: The construction budget for this Project is \$XXX,XXX or the estimated spend for this Project is \$XXX,XXX

1.3 SCHEDULE

Clearly define any schedule constraints or expectations that you have for the project. Note: this is not the procurement schedule requirements, but the post award schedule requirements. Is there a required date that the Project must begin on, or date that the roof must be completed by? Are there any special dates or times that the vendor should be aware of (normal business hours, after hours, support, emergencies, planned shutdowns, holidays, days that vendor is not allowed to work, project opening ceremony, etc.) If there is a mandatory completion date, you must identify is it more important to meet the budget constraints or the schedule constraints (you must pick one as more important than the other – they cannot be equally important)

1.4 PROJECT LOCATION

Identify where the project will be located. Provide a map/sketch. If possible, identify potential staging areas, parking, critical areas that cannot be impacted, etc.

1.5 GOALS

- What is the driving force/need for having this project/service procured?
- Consider if your goal is only to install a roofing system, or are you looking to waterproof your building (minimize leaks) for the longest period of time, for the best cost
- Describe what problems, issues, obstacles, challenges that you are facing now, which you are trying to solve with this procurement
- Identify the major goals, expectations, objectives, or benefits of the new project.
- Consider any Roofing System or Contractor Goals: Identify the goals and expectations that are specifically related to the contractor or roofing system. Think about what the vendor needs to accomplish to receive a 10 / 10 rating when the project is complete.
- Are you looking for the lowest initial cost of roofing system, or a system with the cheapest life-cycle over 5-10-15 years? How long do you want the system to last (only a few years to sell the building, or long-term)

1.6 UNIQUE CONSIDERATIONS / CHALLENGING REQUIREMENTS

- Identify any unique requirements about this project/roof that may not be common/typical to other similar projects that vendors have performed.
- Identify anything about this project/roof that would make it more challenging or unlike other project/roof that a contractor has performed.
- Identify anything about the Owner (or the User) that would make it unlike any other project that a vendor has done.

- Identify any unknown conditions that you are aware of
- List anything that is excluded from this Project that the vendor should be aware of
- List any future conditions, outside of this scope that the vendor should keep in mind
- Identify if you have made any assumptions (about the project, roofing system, or the contractor)
- Is there anything else that could cause a potential surprise or pose a significant challenge (i.e. sometimes 'smell' can be an issue for hospital re-roofing)

1.7 DETAILED TECHNICAL REQUIREMENTS

- You can attach (and reference) exhibits to make this easier to follow (i.e. drawings and specs). State that "More detailed project information is included to enable you to provide an accurate proposal. This information is located in Appendix B"
- Referenced Exhibits may include: Pictures, Site plans, Drawings, Exhibits, etc
- Provide all requirements that must be met to achieve a 100% performance satisfaction.
- This may include any specifications, details, service levels, etc.)
- Describe each of the deliverables/products/services to be provided by the selected vendor for this scope of work
- Describe the minimum requirements that must be performed by the vendor or accomplished by the new project to meet the goals/expectations

1.8 ADDITIONAL INFORMATION

- Describe the roles, responsibilities, and involvement (of the Owner) throughout the duration of this project/service
- If applicable, describe any alternatives or options that you would like pricing on (that should not be considered part of the base proposal)

1.9 DESIGN INFORMATION

- If applicable:
 - Name/Contact of Designer
 - Status of Design
 - Designers role and requirements throughout the construction phase
 - The designers greatest areas of concern regarding the construction
- The designers greatest areas of concern regarding the design
- Identify the status of the design. For example:
 - This solicitation is a Design-Bid-Build, (design is 100% complete)
 - This solicitation is a CMAR, (design is 30% complete)
 - This solicitation is a Design-Build, (there is no design)

SECTION 2

CURRENT CONDITIONS

PURPOSE: Paint a picture of your current environment so the Offerors know where you are at, what issues you are currently attempting to solve, and what they may encounter when addressing the Statement of Work. This information will help Offerors minimize their contingency costs by better understanding your current environment.

2.1 ABOUT THE OWNER

Provide a brief / high level overview about the Owner, Agency, Department, or Organization. Consider identifying the major goals of the organization or mission statement (if this is a Public Agency, provide brief overview of who the Agency serves). If applicable, provide any background information about the client/user that is purchasing this roofing project.

2.2 KNOWN SITE & BUILDING CONDITIONS

Provide all known existing conditions about the building, site, users, etc. This can include:

- Identify the location of current building that will be roofed
- Identify if there are any constraints, issues, or challenges with this location
- Identify if there is anything that makes this location unique (that contractors might not be used to or might not have encountered in the past)
- What critical functions are performed in this building (i.e. classroom, office space, high-tech manufacturing, etc.)
- Who are the critical stakeholders/users/tenants of this building/facility
- What issues, risks, challenges have you encountered faced with this project/service/building in the past (i.e. parking, staging, hours of operation, etc.)
- Describe any unique issues/challenges that you have had (with site, building, user group, etc.)

2.3 KNOWN ROOF CONDITIONS

Provide all known existing conditions about the existing roofing system. This should include:

- Type of existing roofing system(s)
- Age of existing system(s)
- Type of roof deck
- Type of insulation
- Results of any moisture survey/scans
- Locations of any existing roof leaks
- Areas that have had the greatest issues
- Areas of weaknesses, limitations, or constraints of current roofing system
- How often is the roof maintained per year
- How much traffic is on the roof
- Is there anything that you know that you don't know about the roof, deck, building, etc.

SECTION 3

PROPOSAL REQUIREMENTS

3.1 DATE AND TIME REQUIREMENTS

All proposal packages MUST be received before the date and time indicated in the Procurement Schedule in Section 1 ("Proposal Due Date"). Late submittals will not be accepted or considered. It is the responsibility of the Offeror to ascertain any additional security requirements with respect to packaging and delivery to the Owner. Offerors should be mindful of any potential delays due to security screening procedures, weather, connectivity issues, or other delays whether foreseeable or unforeseeable. Failure to submit a response before the Proposal Due Date will result in disqualification of the Proposal.

3.2 GENERAL FORMAT

All materials submitted SHALL become a part of the proposal and may be incorporated in a subsequent contract between the Owner and the selected Offeror. All responses/submittals to this RFP SHALL be made in accordance with the format outlined below. Failure to submit in the requested format or failure to submit all the required forms may cause a proposal to be deemed non-responsive. The format for the proposal includes the following:

- Shall be written in the English language
- Submitted on standard 8 ½" x 11" paper size using the format that is specified and required in this RFP and each Submittal Form.
- Use Arial or Calibri font, and must have a minimum font size of 10.

3.3 SUBMISSION REQUIREMENTS

<<Identify if the Proposal will be submitted via Hardcopy, Online Electronically, or both>> For Example:

The Offeror SHALL submit one (1) hardcopy proposal package. The proposal package SHALL contain two (2) separate and sealed envelopes, and a USB data stick containing the following information:

ENVELOPE 1: Contains Submittal Form A-G

ENVELOPE 2: Contains only Submittal Form H (Cost Proposal)

USB Data Stick: Containing an electronic copy of the hardcopy proposal response

The proposal package SHALL be submitted in a sealed package containing the two separate envelopes. The Cost Proposal MUST be submitted in a separate sealed envelope within the proposal package (as noted above). The proposal should be stapled together or bound in a three-ring binder. Please do not bind the proposals in any other fashion to allow for easy duplication and distribution. The package SHALL include all required Submittal Forms. The package MUST also contain 1 USB data stick containing a copy of the hardcopy proposal. The electronic files should be saved in MS Word or Adobe PDF file format. Note: if there are any discrepancies between the USB documents and the Hardcopy documents, the Hardcopy documents will take precedence. The package SHALL be addressed and mailed to the Owner and clearly labelled as follows:

<<Insert Owner Name>>

<<Insert Buyer Name>>

<<Insert RFP Number>>

<<Insert Project Name>>

<<Insert Address>>

The Offeror must submit one (1) electronic proposal using the electronic procurement system (see Section 1.7). All files must be in Adobe PDF, MS Word or MS Excel format. <<Insert any additional requirements of the electronic procurement system>>

3.4 SUBMITTAL FORM TEMPLATES

The Offeror must ensure that their response meets all form and content requirements detailed within this RFP. This RFP contains Submittal Forms, which must be used by the Offerors to submit their proposal. Offerors shall NOT re-create these Submittal Forms, create their own Submittal Forms, or edit the format structure of the Submittal Forms (page sizing, font type, font size, page margins, etc.) An electronic copy of each Submittal Form is posted along with this RFP. The Offeror must download, complete, and submit each Submittal Form in their Proposal Package. Any proposal that does not adhere to these requirements may be deemed nonresponsive and rejected.

3.5 SPECIAL FORMATTING REQUIREMENTS

The Offeror MUST ensure that their Proposal meets all the special formatting requirements identified in this Section. This includes requirements regarding anonymity and maximum page limits.

Anonymity: The Submittal Forms listed below MUST NOT contain any names that can be used to identify who the Offeror is (such as company names, company letterhead, personnel names, project names, contractor names, architect names, engineer names, subcontractor names, subconsultant names, manufacturer or supplier names, or product names).

Page Limits: The Submittal Forms listed below have maximum page limit requirements. Offerors MUST NOT exceed the maximum page limits. Note, the page limit applies to the front side of a page only (for example, '1 Page' implies that the Offeror can only provide a response on one side of a piece of paper).

Cost Information: Cost information shall only be contained within Submittal Form I. No other document or Submittal Form may contain cost or fee information

Submittal Form	Anonymous Document	Maximum Page Limits
Submittal Form A – Offeror Background		
Submittal Form B – Project Approach	YES	1
Submittal Form C – Narrative Proposal Items	YES	2
Submittal Form D – Narrative Proposal Items as Needed	YES	2
Submittal Form E – Past Performance Questionnaires		
Submittal Form F – Roofing Warranty Analysis		
Submittal Form G – Schedule Proposal		
Submittal Form H – Cost Proposal		

Any Submittal Form that does not follow these instructions may receive a '0' score for the evaluated Submittal Form, or the entire response may be deemed nonresponsive and rejected. The Owner also reserves the right, in its sole discretion, to modify a Proposal to remove any minor information that may be non-compliant.

3.6 OFFEROR BACKGROUND (SUBMITTAL FORM A)

The Offeror must complete and sign this Submittal Form. This document shall be signed by an individual that has legal authority to bind the responding entity. This document requests: name and contact information of individual(s) authorized to represent the Offeror, names of key team members of the Offerors project specific team, and confirmation certifying receipt of all addenda.

3.7 PROJECT APPROACH (SUBMITTAL FORM B)

The Project Approach should be a brief roadmap that describes, in major activities or tasks, how the Offeror will meet the Owner's expectations (cost, time, resources, quality, and expectations) as set forth in this RFP. This should be a concise synopsis of the work and approach that will be taken to complete this project. This summary should demonstrate to the Owner that the Offeror can visualize what they are going to do before they do it. *Note: See Section 4.5 for Special Formatting Requirements.*

3.8 Narrative Proposal (SUBMITTAL FORM C)

- If applicable:
 - Insert other proposal items to be evaluated

3.9 Narrative Proposal as Needed (SUBMITTAL FORM D)

- If applicable:
 - Insert other proposal items to be evaluated

3.10 PAST PERFORMANCE QUALIFICATIONS (SUBMITTAL FORM E)

The Owner will incorporate Past Performance Qualifications (PPQ) from both the Roofing Contractor and primary Roofing Manufacturer. The Contractor and Manufacturer will be responsible for collecting PPQ from past clients as outlined in this section.

Step 1) Identify Who To Survey:

- The Contractor and Manufacturer should identify a list of client references that will evaluate their performance on installed roofs.
- The Contractor/Manufacturer should survey clients that are highly satisfied with their roofs.
- There are no age limits on the roofs, however, greater preference will be given to older roofs (so the Contractor/Manufacturer are encouraged to survey old roofs that show long-term performance and satisfaction)
- Roofs must be greater than 5,000 SF (there are no maximum requirements on roof size)
- All roofs must be within 200 miles of the project site/location, OR be from a location that has similar climate/weather (please contact the Buyer if you are unsure)
- The previously installed roofs must be a similar system to the system being proposed on this project. For example, if the Contractor is proposing to install a built-up roofing system, then the past roofs being surveyed must also be built-up roofing systems (the roofs cannot be single-ply, metal, foam, etc.)
- The client/end user must be the reference and shall complete the survey. The survey cannot be completed by contractors, consultants, architects/engineers, or other third parties.
- The maximum number of roofs that can be submitted is 10 for each Contractor/Manufacturer.
- The Contractor and Manufacturer can use the same references provided that they were used on the same project or may elect to survey different clients.

Step 2) Preparing the Surveys:

- The Contractor/Manufacturer is responsible for preparing their own surveys. The survey questionnaire is separated into three different sections/parts. In order to receive credit for a returned survey, the Contractor/Manufacturer shall provide all required information on the survey.
- (Part A) The Contractor/Manufacturer shall enter the name of the Roofing Contractor and/or the name of the Roofing Manufacturer that are being evaluated by the end client in the survey.
- (Part B) The Contractor/Manufacturer shall enter background information about the project being evaluated. All information is required. Failure to provide this information, or listing "n/a" or "confidential" may result in no credit for the survey. The information that is required includes:

- Name of the client or organization that purchased or owns the project (i.e. City of London)
- Name of the project itself (i.e. Fire Station #7, Cafeteria Bld)
- Date the project was installed (i.e. May 2008)
- Estimated Project Cost (i.e. \$850,000)
- Estimated Roof Size (i.e. 150,000 sf)
- Type of Roofing System (i.e. BUR, MOD, Single-Ply, SPF, Metal)
- (Part C) This Part is to be completed by the client/end user, and includes a customer satisfaction question, general comments, and contact information.

Step 3) Distributing and Collecting the Surveys:

- The Contractor/Manufacturer must modify the return information (located at the bottom of the survey) so that the surveys are returned back to the Contractor/Manufacturer. The Contractor/Manufacturer should fax, email, mail, or hand deliver the survey to each client/reference.
- All returned surveys MUST be evaluated AND signed by the client/reference. Once again, this reference must be the owner or end client of the Project. If a survey is not signed, it will NOT be counted or considered.
- The Owner may contact the client/reference to clarify a survey rating, check for accuracy, or to obtain additional information. If the client/reference cannot be contacted, the survey may be deleted and no credit given for that client/reference.
- Returned surveys must be packaged together and submitted with the Offeror's proposal

Additional Information

- To obtain each entities' Past Performance Qualification score, the Buyer will input and average the client/reference satisfaction scores, average roof age, and percent of roofs currently leaking. The Buyer shall also count the total number of returned surveys (which will be analyzed along with the average survey scores). See example below.

Criteria	Roof 1	Roof 2	Roof 3	PPQ Score
Customer Satisfaction Rating (1-10)	8.7	9.2	8.9	8.93
Roof Currently Leaking (Y/N)	No	No	Yes	33.3%
Roof Age (Years)	14.7	18.2	9.3	14.06
Number of Different Roofs Surveyed:				3

- Failing to submit surveys will not disqualify a Contractor or Manufacturer, however, the lack of ratings may impact the Offeror's overall competitiveness (the Contractor/Manufacturer will receive credit for 1 survey, with an average satisfaction rating of 5, with 50% of roofs leaking, and with an average age of 0.1 years).
- Note: if the Contractor or Manufacturer have already completed and performed a similar survey within the last 12 months, the Contractor/Manufacturer may resubmit these surveys provided that they ask and contain the same information and questions as this Submittal Form.

3.11 ROOFING WARRANTY ANALYSIS (SUBMITTAL FORM F)

The Offeror must complete this Submittal Form, which requires a copy of the Manufacturer's roofing warranty (for the primary roofing system that will be installed on the project/building). The sample warranty must also include a copy of the warranty exclusions. The Offeror must identify the warranty exclusions in the Submittal Form. The Buyer will calculate the potential value of the roofing Manufacturer's warranty by taking the total number of warranty exclusions and subtracting them from the Manufacturer's average roof age (obtained from the roofs of the Manufacturer's customer satisfaction responses) or the roofing warranty (whichever may be smaller). See example below:

Criteria	Manufacturer
Manufacturer's Roofing Warranty	25 Years
Average Roof Age (from Manufacturers Past Performance Qualifications)	18 Years
Number of Warranty Exclusions	10
Potential Value of Warranty	8

3.12 SCHEDULE PROPOSAL (SUBMITTAL FORM G)

The Offeror must identify their proposed schedule for this project, which identifies that start date, substantial completion date, and end date when the project will be 100% closed out.

3.13 COST PROPOSAL (SUBMITTAL FORM H)

The Offeror must complete all information requested in this Submittal Form. The Offeror is not permitted to adjust or modify this Submittal Form in any way. The Offeror must submit their cost as requested in this Submittal Form in the format requested. The Offeror may not include additional rates, amounts, costs, information, exceptions, or limitations to their costs proposal. Failure to meet these requirements may deem the Proposal to be non-responsive.

NOTICE: The Offeror shall NOT include pricing or cost information in any other Submittal Form. Failure to meet this requirement may result in immediately disqualification.

For Reference Only Full Legal

SECTION 4

EVALUATION PROCEDURES

4.1 EVALUATION SUMMARY

Proposals will be evaluated based on their overall value to the Owner, which includes both cost and technical factors (as outlined in this Section).

4.2 CRITERIA AND WEIGHTS

Proposals that are found to be responsive, will be evaluated and assessed in accordance with the evaluation criteria below.

Criteria	Points
Cost	250
Interview of Key Personnel ¹	250
Project Approach	50
Narrative Proposal Items << Items from 4.8 & 4.9>>	150
Potential Value of Warranty	50
Overall Project Duration	50
Past Performance Qualification (Contractor)	100
Past Performance Qualification (Manufacturer)	100
Total	1,000

¹ If the Owner shortlists Offerors, only the shortlisted Offerors will be evaluated and receive points for interviews

4.3 CALCULATIONS

The Buyer will prepare a spreadsheet to input and analyze all Offeror information and evaluation scores. In general, the following approach will be used to calculate a Offeror's score for a particular criteria:

$$(\text{Offeror Rating}) / (\text{Best Rating}) * (\text{Weight Points Possible})$$

For example, if the Offeror received an '7' rating for interviews, and the highest interview rating was an '8', and the maximum points possible was '300', the Offeror would receive: $(7)/(8)*(300) = 263$ points

4.4 RESPONSIVENESS

To be considered responsive, at a minimum, Offerors must complete and submit all of the required information (requested in this RFP and the Submittal Forms) on time and submitted as specified in this RFP.

4.5 EVALUATION COMMITTEE

An Evaluation Committee will be used to evaluate specific Submittal Forms of all responsive Proposals, and participate in the Interview process. The Evaluation Committee is expected to contain approximately 3-5 individuals that may, or may not, have technical expertise with this particular type of project or service. Therefore, it is important that the Offerors prepare and submit non-technical documents (to the maximum extent possible).

The Evaluation Committee will be asked to independently review and score the Submittals/Interviews comparatively to one another based on a 1 to 10 scale. A "10" represents that the item being evaluated is significantly greater (or has more value) than the average. A "5" represents that the item being evaluated is about

average (or there is insufficient information to make a dominant decision). A “1” represents that the item being evaluated is significantly below the average. The Buyer will verify each Evaluation Committee members score and average the scores to obtain the final average score for each of the evaluated criteria.

4.6 EVALUATION PROCESS

The follow procedures will be followed to prioritize Proposals:

1. The Buyer will review all proposals for compliance with mandatory requirements as stipulated within the RFP. Proposals deemed non-responsive will be eliminated from further consideration. The Buyer may contact Offerors for clarification of the responses.
2. The Buyer will assign a unique code to each responsive Submittal to create anonymity.
3. The Buyer will provide specific Submittal Forms to the Evaluation Committee, which will anonymous/coded. No cost information, schedule information, or team information will be provided to the Evaluation Committee members during the evaluation process.
4. The Evaluation Committee members will independently evaluate and score the documents and submit their scores back to the Buyer. No group ratings, or consensus meetings will be performed.
5. The Buyer will input, calculate, and prioritize the data and evaluator scores.
6. The Buyer will then shortlist and identify, and invite, the three highest ranking proposals to participate in the Interview Process. Note: The Buyer may increase the number of shortlisted Offerors to include any other Offerors that have a total overall score that is within 5% of the third ranked Offeror’s overall score.

4.7 INTERVIEWS

The Owner may conduct interviews with the Key Personnel/Teams from each of the Shortlisted Offerors.

<<Insert Company’s Standard Interview Language>>

<<Consider the Following Requirements/Items>>

Interviews are expected to last approximately 20 minutes per team. Interviewees will be prohibited from making any reference to their proposed cost proposal or cost information. Interviewees may be asked questions regarding their experience, knowledge and understanding of the scope of work, obstacles and challenges, strategies, and their plan/approach. The Owner may request additional information prior to interviews. After the Shortlisted Offerors have been interviewed, they will be evaluated and scored by the Evaluation Committee.

4.8 FINAL PRIORITIZATION OF OFFERORS

After the Shortlisted Offerors have been interviewed, evaluated, and scored by the Evaluation Committee, the Buyer will perform a final prioritization based on the criteria and weights described in Section 5.2. The highest prioritized Offeror will be invited into the Clarification Period.

4.9 NEGOTIATION/CLARIFICATION PERIOD

<Insert Company Standard Requirements/Practices>>

4.10 AGREEMENT

The potential best value Offeror will be expected to sign the Agreement (Exhibit 1). By submitting an offer in response to this RFP, the Offeror expressly accepts the terms and conditions set forth in the applicable Agreement. Any attempt to offer terms inconsistent with, or in addition to the applicable standard terms in the Agreement shall be deemed ineffective. The Owner may consider requests to alter the Agreement, if these requests are made prior to the ‘Deadline for Questions’ identified in the procurement schedule (Section 1). Any changes, inconsistencies, or additional terms must be expressly accepted by the Owner in writing.

4.11 AWARD PROCEDURES AND AGREEMENT

The successful Offeror will be notified, in writing, when a recommendation for award has been completed, and of the award date of the contract. No payment can be made for action taken or work started prior to the award date of the contract.

4.12 DEBRIEFING

A debriefing document or debriefing meeting may be provided to all Offerors once the contract has been awarded. The debriefing may review the Evaluation Matrix with all information used to prioritize the proposals (cost and scoring in each criteria). The debriefing will not reveal the names of the Offerors (all information will be coded for anonymity). The purpose of the debriefing is to provide Offerors with useful feedback towards areas of continuous improvement.

For Reference Only Full Legal Review Recommended

ADMINISTRATIVE REQUIREMENTS

5.1 OVERVIEW

The <<Organization Name>> (referred to as the “Owner” hereinafter) is issuing this Request For Proposal (RFP) to solicit proposals from Roofing Contractors (referred to as “Offerors”), to <<briefly describe the scope of services>> <<Try to describe at a very high-level and avoid any technical language or specifics, which will be described later in this RFP. For example, to roof/re-roof approximately 50,000 sf.>>. Proposals shall be submitted in accordance with the requirements set in this document.

5.2 BUYER

The individual listed below (referred to as “Buyer” herein) is responsible for the conduct of this procurement. All questions, inquiries, concerns, or clarifications regarding this solicitation must be submitted electronically (via email) to this individual. Offerors shall not contact or communicate with any other Owner employees. Unauthorized contact about this RFP with any other Owner employees may result in immediate disqualification.

Contact Name: <<Insert Name>>
 Title: <<Insert Title>>
 Organization Name: <<Insert Name>>
 Address: <<Insert Address >>
 E-Mail: <<Insert Email>>

5.3 PROCUREMENT SCHEDULE

The Owner will make every effort to adhere to the schedule below. However, the Owner reserves the right, at its sole discretion, to adjust the RFP Schedule of Events as it deems necessary.

No	Activity	Time	Date
1	RFP Issued		xx/xx/xx
2	Pre-Proposal Meeting	9:00 am CST	xx/xx/xx
3	Site Visit	11:00 am CST	xx/xx/xx
4	Deadline for Questions	2:00 pm CST	xx/xx/xx
5	Deadline for Proposal Submission (Proposal Due Date)	2:00 pm CST	xx/xx/xx
6	Shortlisting		xx/xx/xx
7	Interviews	TBD	xx/xx/xx
8	Clarification Period Start Date		xx/xx/xx
9	Notice of Intent to Award		xx/xx/xx

5.4 PRE-PROPOSAL MEETING AND SITE VISIT

A pre-proposal meeting and site visit will be conducted to provide an overview of the project. Attendance at this meeting is not mandatory, but highly recommended for all Offerors. Please email the Buyer a RSVP with a list of personnel (first and last names, phone numbers, and emails) of individuals that will attend this meeting (to ensure there is adequate space for the meeting).

The **Pre Proposal Meeting** will be held at:

Address: <<Insert Address>>
 Building/Room Location: <<Insert Location>>

The **Site Visit** will be held at:

Address: <<Insert Address>>
 Building/Room Location: <<Insert Location>>

5.5 QUESTIONS, INQUIRES, CLARIFICATIONS, REQUESTS FOR INFORMATION

Offerors are expected to promptly review this solicitation, including all of the submittals, exhibits, appendix, and addendum. If there are any discrepancies, inconsistencies, or omissions, the Offeror shall immediately notify the designated Buyer. If the Offeror has questions or requires clarification of the scope of work, the intent, or any aspect of this solicitation, they shall immediately notify the Buyer. All questions, inquiries, clarifications, must be submitted to the Buyer by the due date identified in the Procurement Schedule.

5.6 ADDENDA

The Owner may issue addenda to make changes to the RFP, changes to the scope, respond to any questions, or provide clarification to information stated within the RFP. All written/published addenda shall become part of this RFP and must be included by the Offeror in its proposal. All other communications are unofficial and non-binding.

5.7 ELECTRONIC PROCUREMENT SYSTEM

<<Insert language regarding the electronic procurement system that the Owner will use to collect Q&A, issue addenda, and receive proposal responses.>> <<Identify how to sign up for the system if they are new>>

5.8 GENERAL TERMS OF THIS SOLICITATION

The following terms and conditions apply to this RFP:

A. PREPARATION COSTS

<<Insert language as applicable>> <<For example: All proposal responses and supporting documentation submitted to the Owner by the Offeror will become the property of the Owner. The Owner will not reimburse the Offeror for any costs associated with the preparation of the response to this RFP.>>

B. PUBLIC DISCLOSURE REQUIREMENTS

<<Insert language as applicable>> <<For example: All documents submitted in response to the RFP will become a matter of public record and shall be thereupon considered public records.>>

C. ERRORS OR OMISSIONS

<<Insert language as applicable>> <<For example: The Owner will not be liable for any errors or omissions in Offerors proposal. >>

D. EXCEPTIONS

<<Insert language as applicable>> <<For example: Offerors are cautioned to limit exceptions, conditions, and limitations to the provisions of this RFP as they may be determined to be so fundamental as to cause rejection of the proposal for not responding to the requirements of the RFP. >>

E. POST AWARD DEBRIEFING

<<Insert language as applicable>> <<For example: The Owner will provide an overview of the evaluation matrix that was used to prioritize proposals as outlined in Section 5. Offerors may request a debriefing within 30 calendar days after execution and delivery of the contract. >>

F. REJECTION OF ALL PROPOSALS

<<Insert language as applicable>> <<For example: The Owner expressly reserves the right to reject any or all Proposals. The Owner may cancel this RFP at any time. The Owner is not responsible for any costs incurred by Offerors in the preparation and presentation of Proposals submitted in response to this RFP. >>

G. VALIDITY OF PROPOSAL

<<Insert language as applicable>> <<For example: Proposals submitted in response to this RFP shall be valid for a period of 60 days after the 'Proposal Due Date' in Section 1.3.

H. NEGOTIATION

<<Insert language as applicable>> <<For example: The Owner expressly reserves the right to negotiate with any, all or none of the Offerors, and waive informalities, minor irregularities and discrepancies, and award a Contract without interviews, discussions or negotiations.

I. PROTEST PROCEDURES

<<Insert language as applicable>> <<For example: The intent of this procedure is to provide Offerors with a process to formally object to the content of the solicitation documents, staff action, or a contract award. In order for a Protest to be considered, the Protestor SHALL adhere to the Owner's protest procedures which can be found online at <<xxxxxxx>>. All protests must be submitted and filed within the time limits specified in the protest procedures. >>

J. POST PROJECT EVALUATION

<<Insert language as applicable>> <<For example: The successful Offeror, which is awarded this contract, will be evaluated upon completion of the project, the Owner will evaluate their overall satisfaction of the project and Offeror. This includes (but is not limited to): overall quality, ability to manage the project, ability to minimize complaints, ability to minimize the Owner efforts, ability to minimize project delays, ability to minimize cost increases, and submission of accurate and timely Weekly Risk Reports. The final assessment may be used to document the performance of the Offeror and critical components of their team (individuals and subcontractors). This information may be used on future procurements and shared with other Owners. >>

K. <<ADDITIONAL CLAUSES>>

<<Insert all standard terms and conditions that are applicable to this Solicitation>> Note, this should not contain Contract/Agreement terms and conditions since this language WILL be contained in that document>>

L. ACRONYMS AND DEFINITIONS

<<Insert those that apply>> For example:

Buyer: An Owner employee who is assigned to manage this procurement. Can also be referenced as the contracting officer, solicitation officer, or procurement officer

Contractor: Synonymous with Offeror

Mandatory: A requirement that must be satisfied. Failure to comply with a mandatory requirement will lead to the disqualification of the Offeror's proposal.

Proponent: Synonymous with Offeror.

Proposer: Synonymous with Offeror.

Offeror: The person, firm, corporation, partnership, or joint venture submitting a proposal in accordance with this RFP.

Respondents: Synonymous with Offeror.

Vendor: Synonymous with Offeror

SECTION 6

PROPOSAL FORMS

Submittal Form A	Offeror Background
Submittal Form B	Project Approach
Submittal Form C	Narrative Proposal
Submittal Form D	Narrative Proposal as Needed
Submittal Form E	Past Performance Qualifications
Submittal Form F	Roofing Warranty Analysis
Submittal Form G	Schedule Proposal
Submittal Form H	Cost Proposal

For Reference Only Full Legal Review Recommended

SUBMITTAL FORM A – OFFEROR BACKGROUND

PROJECT INFORMATION

RFP Number: _____
Project Name: _____

OFFEROR INFORMATION

Name of Company: _____
Web URL: _____
Address: _____

Number of Years in Business (Under Current Business Name): _____
Provide your License Number (in the jurisdiction for this project): _____

CONTACT INFORMATION

Identify an individual that can be contacted for clarification on this proposal

Name: _____
Title: _____
Email: _____
Telephone: _____

ADDENDA ACKNOWLEDGEMENT

The Offeror acknowledges receipt of the following addenda and has incorporated the requirements of such addenda into their proposal. Failure to identify and sign for all addendum may subject the Offeror to disqualification. The Offeror must list all addenda's (by number), then initial and date to confirm that you have received and incorporated them into your Proposal. *The Offeror may add more rows as necessary*

Number	Initials & Date

Number	Initials & Date

Number	Initials & Date

FINANCIAL INFORMATION

What is the Offerors average annual revenue from work completed in the last three (3) years?

Year	Revenue
	\$
	\$
	\$

CRITICAL TEAM MEMBERS

Identification of the critical project team (shown below), which shall be used by Offeror for the duration of the Contract resulting from this RFP. These individuals cannot be removed or replaced, unless requested or approved to do so by the Owner.

Name of Project Manager _____

Name of Site Superintendent _____

The Project Manager: this individual shall be the daily single-point-of-contact and the primary point of contact to resolve any issues, clarify cost, clarify schedule, and answer any questions. This individual will be the project lead for the execution of this project for the entire duration of the project.

The Site Superintendent: this individual shall be the primary person that will manage the site on a daily basis. This individual will be on the jobsite every day for the entire duration of the project.

ROOFING MANUFACTURER

Name of Primary Roofing Manufacturer _____

Product Name: _____

Type of System Being Installed:

- ☐ Built Up ☐ Metal
☐ Modified Bitumen ☐ Shingle
☐ Single Ply ☐ Other _____
☐ Spray Foam

CERTIFICATIONS <<Insert/Modify as Needed>>

No	Criteria	Response*
1	The Offeror is presently engaged in the business of providing the services & work required in this RFP.	True False
2	The Offeror confirms that it has the financial strength to perform and maintain the services required under this RFP.	True False
3	The Offeror confirms that they can obtain and maintain all necessary bonding and insurance as required on this project.	True False
4	The Offeror can provide (if requested) financial records for the organization for the past three years.	True False
5	The Offeror has not had any contracts terminated by the Owner (within the past five years).	True False
6	The Offeror certifies that it is not currently debarred, suspended, proposed for debarment, or declared ineligible for award by any Governmental entity.	True False
7	The Offeror certifies, within the last 5 years, they have not been convicted or had judgment rendered against them, or any employees for: fraud, embezzlement, theft, forgery, bribery, falsification or destruction of records, false statements, or tax evasion.	True False
8	The Offeror does not have any judgments, claims, arbitrations or suits pending/outstanding against your Company in which an adverse outcome would be material to the company?	True False
9	The Offeror is not (now or in the past) been involved in bankruptcy or reorganized proceeding	True False
10	The Offeror has never, any time, failed to complete a project	True False
11	The Offeror certifies that they do not have any (real or perceived) conflicts of interest with the Owner	True False

** Please attach additional information on any subject where the Offeror responded "False" to a question above. Failure to answer may be grounds for disqualification.*

STATEMENT OF CERTIFICATIONS AND ASSURANCES <<Insert Company Standard Language as Needed>>

The Offeror does, hereby, expressly affirm, declare, confirm, certify, and assure ALL of the following:

1. The Offeror has thoroughly reviewed this RFP, contract documents, including the pro forma agreement, and all pertinent appendices, exhibits, and attachments include as part thereof, and that we fully understand all elements required for the full completion of the project as defined therein.
2. The Offeror further certifies that, if selected as the successful firm, we will enter into the contract agreement included with this RFP.
3. The prices in his Proposal have been arrived at independently without collusion, consultation, communication or agreement for the purposes of restricting competition as to any matter relating to such prices with any other firms or with any other competitor.
4. The Prices quoted in his Proposal have not been and will not be knowingly disclosed directly or indirectly by respondent to any other firm or competitor prior to the final date and time for submission of such proposal.
5. No attempt has been made or will be made by respondent to induce any other person, partnership, or corporation to submit or not to submit a proposal for the purpose of restricting competition.
6. The Response submitted in response to the RFP shall remain valid for at least 30 days subsequent to the date of the Response opening and thereafter in accordance with any contract pursuant to the RFP.

By signature below, the signatory certifies legal authority to bind the responding entity to the provisions of this RFP and any contract awarded pursuant to it. The Owner may, at its sole discretion and at any time, require evidence documenting the signatory's authority to be personally bound or to legally bind the responding entity.

**DO NOT SIGN THIS DOCUMENT IF YOU ARE NOT LEGALLY
AUTHORIZED TO DO SO BY THE ENTITY RESPONDING TO THIS RFP.**

SIGNATURE & DATE:

PRINTED NAME & TITLE:

NAME OF FIRM:

DATE:

SUBMITTAL FORM B – PROJECT APPROACH

SPECIAL REQUIREMENTS: This Submittal Form must not contain any names that can be used to identify who the Offeror is, must not identify the Offerors cost/fee, and must not exceed the page limits specified in the RFP (reference RFP Sections 4.5).

For Reference Only Full Legal Review Recommended

SUBMITTAL FORM C – NARRATIVE PROPOSAL

<<Insert Requirements/Format>>

For Reference Only Full Legal Review Recommended

SUBMITTAL FORM D – NARRATIVE PROPOSAL

<<Insert Requirements/Format>>

For Reference Only Full Legal Review Recommended

SUBMITTAL FORM E – PAST PERFORMANCE QUALIFICATIONS

The Owner has requested Past Performance Qualifications on Roofing Contractors and Manufacturers. The companies listed below have identified you as a client for which they have previously installed a roof for. We would appreciate you taking the time to complete this survey.

PART A – VENDOR / PERSONNEL REQUESTING CLIENT FEEDBACK

Name of the Roofing Contractor: _____
Name of the Roofing Manufacturer: _____

PART B – PROJECT BACKGROUND

Client Name: _____ Roof Area (SF): _____
Project Name: _____ Date Installed: _____
Roof Location: (City & State) _____ Cost (\$): _____
Type of System: ☐ Built Up ☐ Mod Bit ☐ Single Ply ☐ Spray Foam ☐ Metal ☐ Shingle ☐ Other _____

PART C – REFERENCE EVALUATION

Please evaluate if your roof currently leaks and rate your overall level of satisfaction on a scale of 1 to 10 (with **10 representing that you were very satisfied** and **1 representing that you were very dissatisfied**). Consider all aspects of the vendor and their key personnel performance, such as: ability to manage project cost, ability to manage schedule, quality of workmanship, close out process, ability to communicate and document risks, and ability to follow the user's rules, regulations, and requirements.

CRITERIA	UNIT	RATING
Has the roof ever leaked since it was installed?	(Yes / No)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Does the roof currently leak?	(Yes / No)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Overall Customer Satisfaction – Roofing Contractor/Installer	(1-10)	
Overall Customer Satisfaction – Roofing Manufacturer/Product/System	(1-10)	

Please provide any additional information regarding the roofing contractor/installer and the roofing product or system (consider: response time to leaks, would you purchase the system again, general recommendations, anything you would do differently, the greatest risk/problems/challenges that were encountered, etc.)

Printed Name of Evaluator _____ Title _____ Phone Number _____ Signature _____

Thank you for your time and effort in assisting us in this important endeavor.
Please return the completed survey to: **For Reference Only - Full Review Recommended**

SUBMITTAL FORM F – ROOFING WARRANTY ANALYSIS

MANUFACTURER INFORMATION

Name of Manufacturer:

Name of Product/System:

Type of System:

☐ Built Up ☐ Mod Bit ☐ Single Ply ☐ Spray Foam ☐ Metal ☐ Shingle ☐ Other

Warranty Period (Years):

REQUIRED ATTACHMENTS

The following documents must be attached to this Submittal Form. Please ensure that the documents are clear and legible.

- ☐ A copy of the Manufacturer's Warranty (that will be issued on this Project). Please ensure that the Warranty states the duration of the warranty period.
- ☐ A copy of the Manufacturer's Warranty Exclusions

WARRANTY EXCLUSIONS

Please identify if the Warranty (that is being proposed) contains any of the following exclusions:

NO	EXCLUSION	RESPONSE
1	Requirements for the owner to use reasonable care	<input type="checkbox"/> Yes <input type="checkbox"/> No
2	Requirements for the owner to provide routine inspections or maintenance	<input type="checkbox"/> Yes <input type="checkbox"/> No
3	Requirements for the owner to pay for roof inspections	<input type="checkbox"/> Yes <input type="checkbox"/> No
4	Abnormal use or unusual occurrences	<input type="checkbox"/> Yes <input type="checkbox"/> No
5	Restrictions based on traffic on the roof	<input type="checkbox"/> Yes <input type="checkbox"/> No
6	Ponding water, standing water, or requirements for positive drainage	<input type="checkbox"/> Yes <input type="checkbox"/> No
7	Damage caused by animals, insects, pests, etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No
8	Damages caused by chemicals, solvents, liquids, acids, etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No
9	Changes in building use or purpose	<input type="checkbox"/> Yes <input type="checkbox"/> No

SUBMITTAL FORM G – SCHEDULE PROPOSAL

Identify the proposed project schedule:

Start Date (MM/DD/YY):

Substantial Completion Date (MM/DD/YY):

End Date (100% complete) (MM/DD/YY):

For Reference Only Full Legal Review Recommended

SUBMITTAL FORM H – COST PROPOSAL

SECTION 1 – PROJECT COST

The Offeror is required to provide a clear breakdown as indicated in this Submittal Form. The Offeror's Total Project Cost shall include the cost for everything that is necessary to meet the intent of the Owner as described in this RFP, including, but not limited to: materials, products, labor, subcontractors, suppliers, equipment, applicable taxes, fees, overhead, profits, travel, direct and indirect costs, etc. Pricing shall include complete shipment and delivery of all equipment to the project site unless otherwise stated. All Federal, State, Provincial and Local taxes, fees, assessments, and tariffs and the cost of all required insurance are included in this Proposal Cost. If selected to perform this work, the Offeror agrees, as a condition of this proposal, to submit evidence satisfactory to the Owner of our financial ability to perform all work covered by this proposal.

ITEM	DESCRIPTION	COST
1	Design Activities	\$
2	Tear-off Activities	\$
3	Roofing System/Product Costs	\$
4	Flashing Costs	\$
5	Insulation Costs	\$
6	Installation Activities	\$
7	Other	\$
Total Project Cost:		\$

SECTION 2 – ALTERNATIVES

The Offeror shall provide estimated costs for the following alternatives (these alternatives and costs must not be included in the total base proposal cost in Section 1 of this Submittal Form)

ITEM	DESCRIPTION	COST
1	Description 1	\$
2	Description 2	\$
3	Description 3	\$
		\$
Total Project Cost:		\$

SECTION 7

ATTACHMENTS & EXHIBITS

- Exhibit 1 Agreement / Contract
- Exhibit 2 Specs, Drawings, etc.
- Exhibit 3 <<Insert as needed>>

For Reference Only Full Legal Review Recommended