



D.C. DEPARTMENT OF GENERAL SERVICES

REQUEST FOR PROPOSALS

ROOF MANAGEMENT SERVICES

April 20, 2015

Proposal Due Date: May 14, 2015 by 2:00 p.m. EDT

Preproposal Conference: April 27, 2015 at 10:30 a.m. EDT

to be held at:

**Frank D. Reeves Center,
2nd Floor Community Room
2000 14th Street, NW,
Washington, DC 20009**

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Solicitation Number: DCAM-15-CS-0075

Executive Summary

The District of Columbia Department of General Services (“Department” or “DGS”) is responsible for the day-to-day management of roofs on all DGS facilities. In total, DGS has approximately 11 million square feet of roofs in its portfolio and seeks to engage a consultant that will implement a proactive management program to ensure that the roofs are properly maintained and managed so as to increase asset life and thereby decrease capital costs, prevent leaks and ensure that any leaks that do occur are remedied in a prompt manner, and to facilitate the use of the roof spaces so as to ensure environmental efficiency, reduce stormwater run-off and, where appropriate serve as platform for alternative energy such as solar arrays. At a minimum, the selected consultant will be required to: (i) visually inspect all of the roof sections at least once a year; (ii) manage a leak response center as well dispatch, manage and supervise roofing contractors in connection with roof leaks; (iii) design and provide construction administration for roof rehabilitation and re-roofing projects, and (iv) provide oversight of roof design and construction for major renovation and new construction projects.

In addition, the selected consultant will be required to support DGS and its Energy and Sustainability Division in connection with that Division’s mission to reduce energy consumption throughout and to minimize the impact of the District government on the environment. As part of this effort, the roofs should be managed to reduce energy usage in DGS facilities through energy conservation, to provide a platform for renewable energy production, and the mitigation of stormwater and urban heat island effects through an integrated roof management program. Currently, DGS intends to install more than 10MW of solar PV in 2014/2015 and has invested more than \$2 million in green roof construction, roof restoration and re-roofing projects using Energy Star certified roofing membranes, insulation upgrades and related projects. The Roof Management Consultant shall support these initiatives as requested by DGS through the tasks outlined herein that extend the roof management program.

The estimated total roof area by DGS Department is as follows:

Department	DGS Facilities		
	Roof Area (SF)	Roof Sections	Buildings
DC General Hospital	484,401	120	12
DCPS	6,210,003	1,353	135
DPR	832,939	246	78
DRES	2,834,550	348	64
FEMS	408,976	128	40
MPD	481,631	94	29
Total	11,252,500	2,289	358

The DGS roof portfolio includes over 250 acres of roofs.

A.1 Contract Term and Fee Structure

The contract period will be one year with two additional option years that may be awarded at the Department's discretion. The Department intends to implement the Project through a combination of firm fixed price tasks for those elements of the Project with well-defined and established scopes, and time and materials tasks (based on hourly rates) with not-to-exceed limits for those elements of the Project without well-defined scopes. Offerors will be required to submit with their proposal an Offer Letter in substantially the form of **Attachment A** on the Offeror's letterhead.

Other than the original proposal (which shall include both a pricing and technical response), Offerors will be required to submit copies of the pricing portion of their proposal (including the Form of Offer Letter and any spreadsheets or other pricing documents referenced in the Form of Offer Letter) separately from the technical portion of their proposal. The technical portion of the proposal consists of everything other than pricing information.

A.2 Form of Contract

The Form of Contract will be issued by addendum. Offerors should carefully review the Form of Contract when submitting their proposal. To the extent there are any inconsistencies between this RFP and the Form of Contract, the Form of Contract shall prevail. Offerors are further advised that they are required to submit their proposal premised upon entering into a contract that is substantially similar to the Form of Contract and that any proposed changes to the Form of Contract must be clearly identified and described in their proposal. A proposal that fails to specifically identify and describe the requested changes shall be deemed non-responsive.

A.3 Economic Inclusion

The Department requires that Local, Small and Disadvantaged Business Enterprises ("LSDBEs") participate in this project to the greatest extent possible and desires that such businesses perform at least fifty percent (50%) of the work under this procurement. Thirty-five percent (35%) of the Contract Work must be awarded to entities that are certified as Small Business Enterprises by the District of Columbia Department of Small and Local Business Development, and twenty percent (20%) of the Contract Work to entities that are certified as Disadvantaged Business Enterprises. The Department will also require that the selected Roof Management Consultant and all of its subconsultants, subcontractors, and suppliers, enter into a First Source Employment Agreement with the Department of Employment Services and hire fifty-one percent (51%) District residents for all new jobs created on the project. Please see **Part C** of this RFP for additional information.

In addition to LSDBE participation as described above, the Department requires that District residents participate in the Project to the greatest extent possible. The Roof Management Consultant will assist the Department in identifying roofing contractors for roof rehabilitation, replacement, leak response and repair and energy services. The Roof Management Consultant

will work with the Department to establish a minimum requirement for the percentage of labor hours worked by District residents on these projects and provide workforce development opportunities to encourage maximum participation of District residents and LSDBE firms on these projects. Offerors shall submit with their proposals a Workforce Utilization Plan outlining how they intend to increase participation by DC residents in the performance of the work on this Project.

A.4 Selection Criteria

Proposals will be evaluated in accordance with **Part D** of this RFP. The following evaluation criteria will be used:

- Experience & References (25 points)
- Key Personnel (15 points)
- Management Plan (15 points)
- LSDBE Compliance/Utilization (10 points)
- Workforce Utilization Plan (10 points)
- Cost (25 points)

A.5 Organizational Conflict of Interest / Objectivity Relevant Experience

DGS is seeking to engage a consultant that will provide portfolio level management over DGS' roof assets. As part of this effort, the Roof Management Consultant will assist in managing and supervising the various roofing contractors and design consultants that will implement the work. As such, the Roof Management Consultant must demonstrate that there are no business conflicts of interest in the provision of this service. Specifically, the Roof Management Consultant must certify that neither it, nor any affiliated company or individual receives any compensation either directly or indirectly through the sale of roofing materials or products, or through the provision of roof construction or energy related construction and operations services other than fixed price minor maintenance services provided incidental to roof assessment and roof management. Affiliated companies or individuals include a parent company, subsidiary, companies with common ownership, officers or principal owners of the Roof Management Consultant, or similar arrangements.

A.6 Procurement Schedule

The schedule for this procurement is as follows:

- | | |
|---|--------------------------------|
| • Issue RFP | - April 20, 2015 |
| • Pre-proposal Conference | - April 27, 2015 at 10:30 a.m. |
| • Last Day for Questions/Clarifications | - May 7, 2015 |
| • Proposals Due | - May 14, 2015 by 2:00 p.m. |
| • Notice of Award | - on or about June 8, 2015 |

A.7 Attachments

- Attachment A** - Form of Offer Letter
- Attachment B** - Disclosure Statement
- Attachment C** - Tax Affidavit

SECTION B SCOPE OF WORK

The estimated total roof area by DGS Department is as follows. These roof areas are the basis of the scope of work and pricing for this contract:

DGS Facilities			
Department	Roof Area (SF)	Roof Sections	Buildings
DC General Hospital	484,401	120	12
DCPS	6,210,003	1,353	135
DPR	832,939	246	78
DRES	2,834,550	348	64
FEMS	408,976	128	40
MPD	481,631	94	29
Total	11,252,500	2,289	358

All calculations and cost estimates required are to be provided with the accuracy and detail appropriate for future use in program development. Cost estimates should reflect true costs benchmarked against standard market costs which would be expected to be incurred if engineering bid documents were to be produced and opportunities arise for implementation.

The Roof Management Consultant will expect to find buildings ranging in height from 12 feet to 90 feet above adjacent grade. The Roof Management Consultant shall furnish all materials, labor, development support, safety equipment, and access equipment including any ladders and lift equipment required to provide the services included in the contract. The following tasks provide the requirements for each portion of the roof management contract.

B.1 Operation and Maintenance of Roof Systems

The Roof Management Consultant shall provide consulting, maintenance, and management services to manage the day-to-day operations of all DGS roofs. Specific tasks are defined in the following sections.

B.1.1 Roof Surveys and Assessment

The Roof Management Consultant shall provide a visual on-the-roof survey of all DGS facilities listed in this scope of work. The surveys will be performed by the Roof Management Consultant with the purpose of developing a comprehensive roof condition database for all roofs included in the existing DGS facilities such that each roof is surveyed on a yearly basis. The Roof Management Consultant must procure any equipment (e.g. ladders, lifts) needed to perform roof surveys. The Roof Management Consultant shall take core cut samples of all low-slope roof systems to determine the components of the entire system including membrane, vapor barrier, insulation, roof deck material, and any other components. All cores shall be repaired according to manufacturer specifications at the completion of the core sample process.

Each survey will include survey-grade GPS data for every individual roof component and feature along with photographs for all roof perimeters, drains, major equipment, and deficiencies. The survey shall provide a roof inventory for existing conditions to include the following:

- Field measure and record dimensions of roof areas, and locate all roof penetrations and other significant roof features
- Take core-cuts of each individual low-slope roof section to verify the roof assembly in place. Locate core(s) on roof plan for future identification. Permanently patch core on the same day as core cut using standard industry practice as provided by the roof system manufacturer and/or the NRCA as appropriate for the roof system.
- Closely visually inspect the roof system components in order to assess roof condition including field membrane, wall flashings, projection/penetration flashings, counter-flashings, parapet coping caps, sheet metal, drainage, drainage devices, signs and location of leakage, potential leakage, masonry parapets, and other adjacent roof conditions that may affect the watertight integrity of the building.
- Photograph roof field, details and existing defects for documentation and future reference. Electronically link all photos to inventory, condition, defect and field of roof items in the system database.
- Mark deficiencies on the roof and document their location on the roof plan by action code and action code legend.
- Inventory and photograph HVAC equipment showing manufacturer labels.
- All information gathered shall be entered into a roof management database. The data shall be web-based and available to DGS for unlimited use by multiple users with a user access code and password.

B.1.2 Condition Assessment Report (CAR)

For each building, a report with the following:

- Roof synopsis of findings in single page summary form.
- Roof maintenance, repairs and replacement recommendations for a ten-year period. Include estimated remaining service life (ERSL) and recommended replacement date that is outside of the ten-year plan period for all roofs surveyed.
- Options for roof restoration in lieu of roof replacement at the end of ERSL.
- A ten-year budget for the total cost of ownership including roof maintenance, repairs restoration and/or replacement over a 10-year planning period.
- Roof system information documenting existing roof assembly.
- Testing Results - as appropriate (i.e., asbestos testing, moisture testing).
- Roof Condition Index Evaluation documenting the condition and rate the condition/status of the following:
 - Quality of original construction and subsequent maintenance
 - Leak and leak damage
 - Roof field membrane

- Perimeter flashings
- Projection flashings
- Sheet metal components
- Drainage
- Estimating remaining service life
- Miscellaneous (parapet walls, mechanical equipment, etc.) A narrative and recommended course(s) of action to help analyze the roofing situation in conjunction with both short-term and long-range needs and objectives and a brief summary of work for any roof that is recommended for replacement during the five-year planning period.
- Photographs and a photograph log depicting detailing conditions found with a label as to what the photo is identifying. The photos shall be digital photos, and their location designated on the roof plan. The photos shall be available in the online database system described herein.
- An online interactive roof plan showing all roof boundaries, rooftop equipment and projections/penetrations, drain locations, as well as survey information such as slope direction, areas of significant ponding water, photo locations, and action codes as to any repairs that are recommended. The roof plan will include a legend identifying all roof components, recommended repairs, core sample locations, etc.

B.1.3 Annual Preventive Maintenance and Minor Repair

The Roof Management Consultant shall provide annual (once per year) preventive maintenance and minor repair on all low slope roof sections. At a minimum, the preventive maintenance and minor repair scope shall include the following:

Debris Removal

- Clean and remove all leaves and growing plants from roof surfaces, gutters, downspouts and other roof / building components
- Remove any other debris, construction material or other foreign or abandoned items from the roof surface
- Dispose of all material in approved waste receptacles on site or in any legally acceptable manner offsite if no waste facilities are available on site
- Inspect and clean all drains, scuppers, gutters and downspouts
- Test all drainage system components to confirm proper operation

Preventative Maintenance and Minor Repair

- Inspect and repair minor roof defects as necessary (splits, tears, holes, etc.)
- Reseal, as necessary, roof penetrations, equipment curbs, skylights, miscellaneous flashings, etc., using products that are compatible with existing roof systems
- Re-attach any loose or disconnected metal work (flashings, counter-flashings, gutters and downspouts) and seal for water and air intrusion and check for proper fit and water-tightness during the inspection process
- Fill sealant pans and reinstall HVAC service panels

- Locate, photograph and report conditions that require permanent repair methods
- Report to DGS any conditions that are health and/or safety related
- Report to DGS the accumulation of foreign or contaminated material

The Roof Management Consultant shall photograph and record all preventative maintenance and minor repair activities, the date performed, before and after photos and include all information in the roof information database required as part of this contract.

B.1.4 Preventive Maintenance Checklists

The Roof Management Consultant will develop preventive maintenance plans for each roof section included in this contract and provide for quick generation of checklists and visual instruction materials as part of the roof information database to be provided as part of this contract. These plans will be tied to the specific inventory items on that roof section so the checklist could be utilized as a “work order” and used by DGS employees or contractors.

B.1.5 24/7 Leak Response Call Center

The Roof Management Consultant will provide a phone and email-based call center for DGS to utilize for leak calls and other roof-related emergencies to include dispatch of contractors and verification of requirements and work completed. This call center shall provide an integrated process to assess roof-related problems; select and dispatch a qualified contractor to perform temporary and permanent repairs; document completed work and provide quality control/quality assurance; and maintain current information in the DGS roof asset management database.

Specifically, the Roof Management Consultant shall provide a 24/7 call center for roof-related emergencies that provides both phone and/or email-based access for DGS staff and approved DCPS staff to report roof-related emergencies. The Roof Management Consultant shall assist DGS in procurement of qualified and approved roofing contractors who are authorized by DGS to perform repairs on DGS facilities and utilize those contractors for response. The Roof Management Consultant shall provide daily, weekly and monthly reporting on the status of all reported roof issues and coordinate quality control and invoice review/approval for DGS.

B.1.6 Green Roof Maintenance

DGS has 25 existing vegetative (green) roofs in its current inventory comprising approximately 290,000 SF of combined roof area. In addition, DGS is installing approximately 6 additional green roofs comprising an additional 79,000 SF of combined roof area in 2015. The new green roofs will have a plant warranty which includes the maintenance for 4 years. These roofs offer benefits in terms of energy performance and storm water retention. These roofs also require a higher level of maintenance than more traditional roofs, both to preserve the vegetative systems and also to protect and extend the life of the underlying roof.

The Roof Management Consultant shall provide green roof maintenance as part of this contract to include four annual visits to each roof (once per quarter). Maintenance will include cleaning all drainage systems, debris removal, weeding and pruning of existing roof systems, install new planting as required for any dead or bare areas. All work shall be documented and included in the roof management database.

B.1.7 Slate Roof Inspections and Maintenance

The Department has responsibility for maintenance and repair of approximately 125 schools in support of the DC Public Schools (DCPS). DCPS has approximately 660,000 square feet of existing slate roofs district-wide on 74 roof sections encompassing 35 different school buildings. The Roof Management Consultant shall provide a detailed assessment of these slate roof systems and develop a plan for maintenance and improvement to increase the safety, longevity and performance of these historic roof assets. The Roof Management Consultant shall also provide maintenance and minor repair to the roof systems as part of the contract to include debris removal, cleaning gutters and other drainage features, reattaching flashing and loose slate, caulking, etc. The Roof Management Consultant will be responsible for providing lift equipment and safety equipment to access these roofs for inspection and maintenance. Permanent fall-protection anchors are not installed or available on these roofs at the present time.

B.2 Capital Requirements for Roof Systems

The Roof Management Consultant shall provide consulting and management services to support the annual capital projects for all DGS roofs. Specific tasks are defined in the following sections.

B.2.1 Design, Specification and Bid Package Preparation

The Roof Management Consultant shall provide the following services for those roofs determined by the Roof Management Consultant and DGS to require re-roofing, green roof installation and/or roof restoration/rehabilitation:

- Conduct a field investigation to gather needed roof construction information, details, etc. for the preparation of roof specifications and detail drawings.
- Evaluate design criteria for roof system selection and specifications. The Roof Management Consultant shall prepare and submit a Design Review Summary to DGS. The Roof Management Consultant shall review the Design Review Summary with DGS with system recommendation and the merits and shortcomings of each option or product. Where possible, proposed equivalent products should also be specified.
- The Roof Management Consultant shall prepare specifications, detail drawings, and roof plan(s) based on the alternative selected. The roof plans and details will be in sufficient detail to provide to bidding contractors to assure complete and comprehensive roof design.

- The Roof Management Consultant shall work with DGS' contracts and procurement staff to assemble instructions to bidders, proposal forms, forms of contract, general and special conditions, technical specifications, roof plans, and details for use as bid documents. DGS' procurement and contract forms and formats will be provided for consultant's use.
- The Roof Management Consultant shall provide preliminary bid documents to DGS for review. The Roof Management Consultant shall gain approval from the selected roof membrane manufacturer(s), assuring that the specification of the roofing system will qualify for the manufacturer's warranty.

B.2.2 Construction Quality Assurance

The Roof Management Consultant shall provide the following services as agreed with DGS during the construction phase of roof restoration, re-roofing, green roof installation and renewable energy projects.

Project Administration - If requested, the Roof Management Consultant will provide the following services:

- Schedule and conduct a preconstruction meeting with the selected Roofing Contractor to reinforce all project criteria and requirements. The Roof Management Consultant will respond to questions and issue meeting minutes.
- Receive from the Roofing Contractor, and review, all shop drawings, product data, samples, and other submittals; coordinate them with information contained in the contract documents and approve or reject the same.
- Review the Roofing Contractor's applications for payment as submitted by Roofing Contractor, and approve or reject such applications in whole or in part and forward to DGS for final approval/payment; maintain records of all such applications and approvals.
- Recommend necessary or desirable changes to DGS, review requests for changes, assist in negotiating Roofing Contractor's requests, and prepare and distribute change orders for necessary approval.
- Provide a job closeout file including the information and paperwork developed during the roof construction project (for full-time construction observation projects only).

B.2.3 Project Safety Auditing

If requested, the Roof Management Consultant will provide the following services:

- Perform a safety audit to review the Roofing Contractor's safety procedures and verify that the project is being managed in a safe manner as required by OSHA regulations, DGS's safety requirements, and other safety practices mandated by the Contract Documents.
- Prepare a report of observations, including photographic documentation when necessary, and distribute the report to DGS and the Roofing Contractor.

- The Roofing Contractor shall retain full responsibility for maintaining the project site in compliance with all applicable laws and standards, and implementing any improvements recommended during the safety audits.

B.2.4 Construction Observation

If requested, the Roof Management Consultant will provide the following on-site quality assurance measures:

- Assist DGS in coordinating the work of the Roofing Contractor with facility operations and other activities to complete the work in accordance with the contract documents.
- Schedule and conduct progress meetings to discuss such matters as procedures, progress, problems, and scheduling.
- Observe the work by visiting the site on a full-time or part-time basis, as agreed to by DGS. The Roof Management Consultant's personnel will familiarize themselves with the progress of the work to endeavor to determine if the work is proceeding in accordance with the contract documents.
- Consult with DGS if any Roofing Contractor requests interpretation of the intent of the Drawings and Specifications, giving interpretations in writing and assisting in the resolution of questions that may arise.
- Record the progress of the work and submit written progress reports to DGS. Documentation will include field reports and photographs.
- When the Roof Management Consultant considers the work ready for final inspection, conduct a final inspection to evaluate the completion of the work of the Roofing Contractor, and submit to the Roofing Contractor a completion punch list.

B.2.5 Corrective Repair/Roof Betterment Management

The Roof Management Consultant shall identify defects on DGS facilities as part of the annual inspection process outlined elsewhere in this scope of work. Not all of these defects and associated repairs are high priority items and many can be safely deferred, but should be monitored. However, some of these defects require immediate repair. Bundling repairs into efficient bid packages is key to achieving high value, lowest cost and high performance. The Roof Management Consultant shall implement and oversee project work, ensuring the work is completed according to the agreed upon plan, budget and schedule. Specifically, the Roof Management Consultant will:

- Prioritize repair projects and prepare budget estimates for all projects based on inspections already completed, underway now, or for any new requirements that develop during the term of this contract.
- Review priorities and budgets with DGS management for approval and budgeting.
- Organize and build repair projects into a consolidated bid package.
- Work with DGS' contracts and procurement staff to issue an invitation to bid and request for proposals from qualified roofing contractors.

- Assist DGS contracts and procurement staff in preparing and issuing contracts to contractors (these contracts will be directly between DGS and the contractor.)
- Respond to field questions.
- Provide construction quality control/inspection services.
- Review/approve invoices for completed work.

All completed work will be included in an updated data set as part of the online roof management application provided by the Roof Management Consultant under this Contract.

B.2.6 Support to Design and Construction Management Contracts

The DGS capital program includes major renovation and/or new construction of schools and other DGS facilities. The Roof Management Consultant shall provide support to the design and construction management teams on these projects to assure that DGS roofing standards are incorporated into these projects. Services will be provided on a T&M basis and must be approved by DGS in advance.

B.2.7 Roof Asset Management Plan (RAMP)

At the completion of annual roof inspections and maintenance, and on an annual basis, the Roof Management Consultant shall formulate conclusions and recommendations for each roof section on each building by analyzing and evaluating observations and findings to provide an appropriate course of action to ensure a full roof service life, typically 20 years or more.

The Roof Management Consultant shall develop cost estimates of corrective action required to extend roof service life by using various industry standard techniques (to include but not limited to; preventative maintenance, repair, restoration or replacement). Present cost estimate in standard cost estimating spreadsheets and life cycle cost analysis. Current costs for material and labor will be updated in the database and used for estimating purposes.

The Roof Management Consultant shall provide reporting tools in the roof management program software application consisting of project information, observations, findings, conclusions, suggestions or recommendations, cost estimates, and supporting documents (photographs, roof plans, etc.).

The Roof Management Consultant shall develop a Roof Asset Management Plan (RAMP) by calendar year in spreadsheet format for 10-year period based on condition as determined above. The RAMP should indicate priority, building number/name, roof membrane type, estimated remaining roof service life, type work necessary, and estimated cost to accomplish the recommended work. In the case of roof repair, include repair item headings to generally indicate type of repairs required. All recommended repairs for a single roof shall be specified for accomplishment at the same time with the following exception: minimal repairs may be recommended to extend a deteriorating roof “a few years” until replacement becomes inevitable. (Example: Repair isolated leak area on aged and weathered built-up roof that has essentially

reached the end of its useful service life ignoring other potential repairs that will not significantly extend roof life and are not necessary to return the roof to a watertight condition.).

B.3 Energy and Sustainability Support

DGS owned facilities are very large energy consumers. The District Government is committed to improving energy performance through effective energy stewardship. This is managed through the DGS Sustainability and Energy Division (“Energy Division”). The Energy Division's goals related to energy are plain: reduce and de-carbonize energy consumption. To that end, the Energy Division is working to dramatically improve the efficiency of building energy usage, employ cutting-edge technology to manage buildings, incentivize occupants to conserve power and seek to acquire commodities in a way that creates minimal exposure to commodity price volatility and de-carbonizes the energy supply.

B.3.1 Building Envelope Energy Conservation Assessments

The Roof Management Consultant shall provide building envelope energy conservation assessments to determine energy savings opportunities for existing roofing and building envelope systems. These assessments are intended to identify specific maintenance, repair and/or upgrade tasks that can be performed to improve building energy performance primarily through air infiltration/exfiltration and insulation remediation.

The building envelope inspections/assessments (at a minimum) will include:

- Sample Blower Door Testing for Qualitative/Quantitative building airflow standards.
- Supplemental thermography for envelope performance (labeled photo log attached via report).
- Photographic supplement to report for identification of performance issues/deficiencies.
- Exterior window/door inspection for infiltration/exfiltration.
- Inspection for fenestration issues related to interior solar gains, interior comfort issues.
- Spot checking of any DGS provided “trouble areas”, and investigation for solutions.

The Roof Management Consultant shall provide a documented envelope report for each individual property. These reports will document findings and recommendations for correction of building envelope deficiencies. Recommendations shall be provided in sufficient detail for either immediate corrective action, or for includes in the design scope for upcoming building renovation design projects.

B.3.2 PV and Solar Thermal Assessments and Feasibility Studies

Upon request from DGS, the Roof Management Consultant will provide feasibility studies and development of procurement documents to support roof mounted PV and carport PV systems on DGS properties. Tasks will include:

- i. **On-Site Data Collection and Feasibility Analysis:** Roof Management Consultant shall perform investment-grade evaluations including technical considerations of DGS assets (e.g. roof condition, shading, electrical interconnection points, carport feasibility, etc.), energy production potential (including panel placement), and comprehensive analysis of project economics. These will be “investment grade” analyses intended to provide sufficient information to support robust pursuit of Power Purchase Agreements (PPAs), direct capital purchase, and/or US government grants for funding of projects if desired. All assumptions will be fully documented and included in the system database for this project.
- ii. **Current Energy Use Analysis:** Roof Management Consultant shall perform energy use analysis on all DGS facilities included in the solar feasibility study. DGS will provide electrical consumption and pricing information including meter data, billing information, total consumption data and pricing agreements with electrical utility providers. This work will include acquisition, analysis, and visualization of smart meter interval data (if available) and monthly utility information. This analysis will ensure that solar generation is optimized to meet DGS’s unique energy demand profile.
- iii. **Economic Feasibility Analysis:** The Roof Management Consultant shall provide analysis to determine and secure the maximum economic benefit of solar power generation, given both technical feasibility (for supply) and client needs (for demand). This work shall include evaluation of potential tax incentives, rebates, and renewable energy credits (RECs) that may be available, which may vary by individual location. Most public agencies cannot benefit from tax incentives; thus, a deep analysis of possible financial advantages of PPAs, with private vendors, will determine the economic benefits and costs of third-party ownership. Roof Management Consultant shall also identify portions of the total portfolio that could be carved out, if any, for direct procurement vs. PPA agreement.

The Roof Management Consultant shall prepare a financial summary including estimated cost, electric production, estimated financial return, business case and financial model, and draft project scope for each possible financing option. Market research will also be conducted to ensure proposed project approaches would attract sufficient market interest. The Roof Management Consultant shall adjust package based on market research and finalize findings into a project package including scope of work, proforma financials, legal structure, and overall project description. Ultimately, this task will ensure that the project’s anticipated prices result in energy cost savings for DGS.

- iv. **RFP Strategy Coordination Draft RFP Preparation (SOW):** The Roof Management Consultant shall prepare a Scope of Work (RFP for solar deployment) to gain maximum economic and environmental benefit to DGS. This work will incorporate all aspects of the technical scope for each array, roof specifications for roof upgrades where appropriate, and requirements for local participation in various aspects of the final system design by the vendor, system installation, system maintenance, and ongoing operation.

Roof Management Consultant shall also provide technical and risk evaluation criteria used as a basis for the RFP and procurement process. This review will require the DGS procurement team to provide review and comments on legal structure for PPA, procurement plans including evaluation criteria to be used for vendor selection, lease structures for roof lease agreements to be included in PPA, contract structure, identification of roof maintenance and access responsibility for the PV systems, and DBE participation requirements. Roof Management Consultant shall work with the DGS procurement team and make needed adjustments for preparation of a final RFP package.

B.3.3 Green Roof Assessments

The USEPA has provided grants to DC/DDOE for installation of green roofs as part of the joint DC/EPA commitment to stormwater management in the Chesapeake Bay watershed area. This grant is specifically intended to provide funding for construction of vegetated/green roofs on District-owned buildings. DGS has identified a number of target sites for green roof installation, and also developed several design specifications for roofs that meet the EPA/DDOE criteria. The Roof Management Consultant shall support DGS in this effort by providing structural evaluation, scope and specification development, and technical procurement assistance needed to complete project development on existing DGS facilities. The Roof Management Consultant will perform the following tasks to support this procurement approach.

i. **Site Investigation and Final System Configuration Selection**

This will include final roof evaluations, definition of overburden requirements, evaluation of warranty overburden provisions and securing warranty extension commitments from current warranty service providers, drainage design criteria, and project staging requirements for construction. Results will be documented and serve as the basis for specification development.

ii. **Develop Specifications**

This will include CSI 3-part specifications and design drawings showing location and details for construction.

iii. **Structural Analysis**

Determine capacity for installation of green roofs and layout of design area within the roof perimeter. The actual engineering analysis will be performed by existing DGS structural engineering on-call consultants. The Roof Management Consultant will secure as-built drawings, coordinate site visits, evaluate roof/weather barrier membrane, provide design alternatives for installation of the green roof system and document findings from the engineer into the overall project specification.

iv. **Technical Assistance for Preparation of RFP**

Prepare the project scope of work, integrate specifications, maintenance, and warranty agreements into the RFP package.

B.4 Online Roof/Energy Information System and Database

The Roof Management Consultant shall provide all roof information developed in the above tasks through a web-based online roof information system and database (i.e., more than an excel spreadsheet). The Roof Management Consultant should explain how its roof management application addresses the following:

- **Field data collection** of descriptive data, attributes, defects, photos, and GPS coordinates and upload to the roof information database. Automatic collection is preferred, to avoid data entry errors from field information to the system database.
- **Standard roof and energy information work breakdown structure** that uses standard descriptions of all roof information items to provide consistency for all roof surveys.
- **Completing calculations of** roof areas and supporting energy evaluation for renewable energy and conservation applications in the energy modeling along with integration of other DGS and DDOE data sets (e.g., GIS or other method).
- **Selecting** roof features and retrieving related descriptive data, defect information, repair status, photos, date and time of survey, repair, and maintenance activities.
- **Provision to store and retrieve Warranty Information** in data form and as a scanned document along with other roof related documents such as as-built drawings, specifications, construction documents, leak response documents, contracts, etc.
- **Roof Condition Score** or other metric to store roof condition assessment data that allows for section level, building level, folder level and portfolio level roof condition summary of information.
- **Cost Estimating Tools** to provide total cost of ownership estimates to include preventive and corrective maintenance, roof restoration, roof replacement, energy upgrades, energy consumption for various insulation/reflectivity/infiltration scenarios.
- **Energy conservation calculators** to estimate the relative energy use affected by insulation, reflectivity, air infiltration and daylighting associated with existing or proposed roof systems.
- **Solar PV and Solar Thermal modeling tools** to provide estimates of solar power and solar hot water output from roof mounted renewable energy systems to include issues related to orientation, shading, roof access and setbacks, etc. This modeling tool must be fully integrated into the roof information database as collected as part of the survey process.
- **Reporting Tools** that allow for online/on-demand generation of roof reports including condition assessment reports, preventive maintenance checklists, quantity takeoff data, cost estimates, work orders for PM and corrective maintenance, and energy summary reports. All reports shall be generated in **MS WORD** or **MS EXCEL**.
- **Native System Database** shall be **Microsoft SQL Server** and shall be fully compatible with DC/DGS **ESRI ArcGIS** applications and Work Order Management systems
- **System Security** shall be verified including current SSL certificates.

B.5 Professional Development and Workforce Development

The DGS roof management program provides a significant opportunity for sustainable workforce development for DC residents including underemployed sectors of the DC resident population, and for students in DC Public Schools. A modest investment in workforce training can create opportunities for DC residents to support DGS projects in the near future, and also provide vocational training to support this growth area of the general regional economy. The Roof Management Consultant shall provide a plan as part of this proposal to create these workforce development opportunities for DC residents. The plan shall become a binding part of the contract and the Roof Management Consultant's performance will be a major factor in determining whether to award option years under the contract.

B.6 Deliverables

The contractor shall provide the following deliverables as part of this contract:

B.6.1 Operation and Maintenance of Roof Systems

The Roof Management Consultant shall provide the following deliverables documenting work performed as described in Section B.1 above.

B.6.1.1 Roof Information Database

To include all assessment elements described in Section B.1.1. All information gathered shall be entered into a roof management database described in Section B.4. The data shall be web-based and available to DGS for unlimited use by multiple users with a user access code and password.

B.6.1.2 Condition Assessment Report (CAR)

For each building, a report in compliance with Section B.1.2.

B.6.1.3 Annual Preventive Maintenance and Minor Repair Summary Report

Documenting all maintenance and completed repairs for annual preventative maintenance and minor repair as specified in Section B.1.3.

B.6.1.4 Preventive Maintenance Checklists

As specified in Section B.1.4 for every roof section in the DGS portfolio. Checklists shall include frequency of recommended work and visual instruction materials showing step by step instructions to perform the work.

B.6.1.524/7 Leak Response Status Reports

The Roof Management Consultant shall provide daily, weekly and monthly reporting on the status of all reported roof issues and coordinate quality control and invoice review/approval for DGS.

B.6.1.6 Green Roof Maintenance Status Reports

Quarterly reports showing descriptions and photographs of all green roof maintenance activities performed as specified in Section B.1.6.

B.6.1.7 Slate Roof Assessment Reports

Assessment reports and data loaded into the roof management system as per Section B.1.7.

B.6.2 Capital Requirements for Roof Systems

The Roof Management Consultant shall provide the following deliverables documenting work performed as described in Section B.2 above.

B.6.2.1 Design and Specification/Bid Package

- Design Review Summary as specified in Section B.2.1.
- Specifications, detail drawings, and roof plan(s) based on the alternative selected as per Section B.2.1.
- Instructions to bidders, proposal forms, forms of contract, general and special conditions, technical specifications, roof plans, and details for use as bid documents.

B.6.2.2 Construction Quality Assurance Reports

- Preconstruction meeting summary, attendee list, response to questions and meeting minutes.
- Approval/rejection notice for shop drawings and submittals.
- Review and recommendations for applications for payment as submitted by Roofing Contractor.
- Change orders for approval and distribution.
- Job closeout file including the information and paperwork developed during the roof construction project (for full-time construction observation projects only).

B.6.2.3 Project Safety Audit Report

Safety audit report as specified in Section B.2.3.

B.6.2.4 Construction Observation

Progress reports as specified in Section B.2.4.

B.6.2.5 Corrective Maintenance

- Repair project SOW and consolidated bid package
- Invitation to bid and request for proposals
- Task Orders to contractors
- Review/approve invoices for completed work.
- Update roof management application

B.6.2.6 Support Design and Construction Management Contracts

Reports and technical documents as required to support these efforts as described in Section B.2.6.

B.6.2.7 Roof Asset Management Plan (RAMP)

Comprehensive Roof Asset Management Plan as described in Section B.2.7.

B.6.3 Energy and Sustainability Support

The Roof Management Consultant shall provide the following deliverables documenting work performed as described in Section B.2.3.

B.6.3.1 Building Envelope Energy Conservation Assessments

Building envelope report as specified in Section B.3.1.

B.6.3.2 PV and Solar Thermal Assessments and Feasibility Studies

As specified in Section B.3.2:

- On-Site Data Collection and Feasibility Analysis Report
- Current Energy Use Analysis Report
- Economic Feasibility Analysis Report
- RFP Strategy Coordination and/or draft RFP scope of work document

B.6.3.3 Green Roof Opportunity Assessments

Green roof studies and analysis as specified in Section B.3.3:

- Site Investigation and Final System Configuration Selection Report
- Design Specifications

- Structural Analysis Report
- Project scope of work with specifications, maintenance, and warranty agreements

B.6.4 Online Roof/Energy Information System and Database

Fully functional roof and energy information management application that complies with all requirements as specified in Section B.4.

B.6.5 Professional Development and Workforce Development

Monthly status reports on progress, problems and corrective actions in support of the requirements as specified in Section B.5.

B.6.6 Monthly Status Reports

Summarize project status, progress toward individual deliverables, issues/challenges & recommendations.

B.6.7 Other Provisions

B.6.7.1 Key Personnel

In its proposal, each Offeror will be required to identify its key personnel. Key personnel shall include the following with regard to the Roof Management Consultant, at a minimum: (i) the Program Manager/Principal in Charge; (ii) the Project Manager; (iii) the Lead Site Roof Surveyor/Consultant; (iv) Assistant Site Roof Inspectors; (v) the Lead Renewable Energy Specialist; and (vi) the Information Technology and Database Specialist. If other specialty consultants are required, please include their proposed roles. The Roof Management Consultant will not be permitted to reassign any of the key personnel unless the Department approves the proposed reassignment and/or the proposed replacement. Please provide a table that identifies the specific staff that will be assigned to this Project, where the proposed key personnel will be located, the time periods during which the individual will work on the Project, and his or her level of effort (i.e. the percentage of time devoted to this project). Please explain how your staffing plan was developed – i.e., how many/what types of individuals and how many hours/days will generally be required for each contract task.

B.6.7.2 Licensing, Accreditation and Registration

The Roof Management Consultant and all of its subcontractors and subconsultants (regardless of tier) shall comply with all applicable District of Columbia, state, and federal licensing, accreditation, and registration requirements and standards necessary for the performance of the contract.

B.6.7.3 Conformance with Laws

It shall be the responsibility of the Roof Management Consultant to perform under the contract in conformance with the Department's Procurement Regulations and all statutes, laws, codes, ordinances, regulations, rules, requirements, orders, and policies of governmental bodies.

SECTION C ECONOMIC INCLUSION

C.1 Preference for Small, Local, and Disadvantaged Business Enterprises

General: Under the provisions of the Small, Local, and Disadvantaged Business Enterprise Development and Assistance Act of 2005, D.C. Law 16-33 (codified at D.C. Code § 2-218.01 et seq.), preferences shall be given to Offerors that are certified by the Department of Small and Local Business Development as being a small business enterprise, having resident business ownership, having a longtime resident business, being a local business enterprise, being a disadvantaged business enterprise, being a local business enterprise with its principal office located in an enterprise zone, being a veteran-owned business enterprise, or being a local manufacturing business enterprise. (A copy of the certification acknowledgment letter must be submitted with the Offeror's Proposal.) In accordance with these laws, the following preferences shall be awarded in evaluating an Offeror's proposal:

- Three (3) preference points shall be awarded if the Offeror is certified as having a small business enterprise.
- Five (5) preference points shall be awarded if the Offeror is certified as having a resident business ownership.
- Five (5) points shall be awarded if the Offeror is certified as having a longtime resident business.
- Two (2) preference points shall be awarded if the Offeror is certified as a local business enterprise.
- Two (2) preference points shall be awarded if the Offeror is certified as being a local business enterprise with its principal office located in an enterprise zone.
- Two (2) preference points shall be awarded if the Offeror is certified as a disadvantaged business enterprise.
- Two (2) preference points shall be awarded if the Offeror is certified as a veteran-owned business enterprise.
- Two (2) preference points shall be awarded if the Offeror is certified as a local manufacturing business enterprise.

Offerors may qualify for more than one of these categories, so that the maximum number of points available under this section is 12 points.

Information: For information regarding the application process, contact the Department of Small and Local Business Development at the following address or telephone number:

Department of Small and Local Business Development
One Judiciary Square Building
441 4th Street, NW, 9th Floor
Washington, DC 20001
(202) 727-3900 (Telephone Number)
(202) 724-3786 (Facsimile Number)

C.2 SLDBE Participation

The Department requires that significant participation by business enterprises certified by the Department of Small and Local Business Development as: (i) a local business enterprise; (ii) a small business enterprise; (iii) a disadvantaged business enterprise; (iv) having a owned resident business; (v) being a longtime business resident; or (vi) having a local business enterprise with its principal office located in an enterprise zone. Accordingly, and in addition to the preference points conferred by **Section C.1**, the Department requires that business enterprises so certified must participate in at least Fifty Percent (50%) of the Contract work under this procurement. Thirty Five Percent (35%) of the Contract Work must be awarded to entities that are certified as Small Business Enterprises by the District of Columbia Department of Small and Local Business Development and Twenty Percent (20%) to entities that are certified as Disadvantaged Business Enterprises. Offerors will be required to submit a Local Business Enterprise Utilization Plan with their proposals. The Utilization Plan must demonstrate how this requirement will be met and, to the extent possible at this stage in the project, should identify the specific firms that will be used and their respective roles.

C.3 Residency Hiring Requirements for Contractors and Subcontractors

At least Fifty One percent (51%) of the Offeror's Team and every subconsultant's employees hired after the Offeror enters into a contract with the Department, or after such subconsultant enters into a contract with the Offeror, to work on this project, shall be residents of the District of Columbia. Upon execution of the contract, the Offeror and all of its member firms, if any, and each of its subcontractors and subconsultants shall submit to the Department a list of current employees that will be assigned to the project, the date that they were hired and whether or not they live in the District of Columbia.

The Offeror shall comply with subchapter X of Chapter II of Title 2, and all successor acts thereto, including by not limited to the Workforce Intermediary Establishment and Reform of First Source Amendment Act of 2011, and the rules and regulations promulgated thereunder.

The Offeror and all member firms, subcontractors, tier subcontractors, subconsultants, and suppliers with contracts in the amount of \$100,000 or more shall be required to comply with the following: (i) enter into a First Source Employment Agreement with the D.C. Department of Employment Services ("DOES") upon execution of the contract; (ii) submit an executed First Source Agreement to DOES prior to beginning work on the project; (iii) make best efforts to hire at least 51% District residents for all new jobs created by the project; (iv) list all employment vacancies with DOES; (v) submit monthly compliance reports to DOES by the 10th of each month; (vi) at least 51% apprentices and trainees employed must be residents of the District registered in program approved by the D.C. Apprenticeship Council; and (vii) trade contractors and subcontractors with contracts in the amount of \$500,000 or more must register an apprenticeship program with the D.C. Apprenticeship Council.

SECTION D EVALUATION AND AWARD CRITERIA

D.1 Evaluation Process

The Department shall evaluate submissions and any best and final offers in accordance with the provisions of this **Section D** and the Department's Procurement Regulations.

D.2 Evaluation Committee

Each submission shall be evaluated in accordance with this **Section D** by an Evaluation Committee. The Evaluation Committee shall prepare a written report summarizing its findings and submit the same to the source selection official. Based on the information submitted by the Offerors in response to this RFP and the report prepared by the Evaluation Committee, the source selection official shall select the Offeror(s) whose submissions are determined by the source selection official to be the most advantageous to the Department.

D.3 Oral Presentation

The Department does not intend to interview Offerors; however, the Department reserves the right to interview Offerors in the competitive range if necessary. If the Department conducts such interviews, each Offeror within the competitive range shall make an oral presentation to the Department's Evaluation Committee, and participate in a question and answer session. The purpose of the oral presentation and the question and answer session is to permit the Evaluation Committee to fully understand and assess the qualifications of each Offeror and the Offeror's key personnel. The submission will be re-scored at the conclusion of the oral presentation.

D.3.1 Length of Oral Presentation

Each Offeror will be given up to 60 minutes to make the presentation. At the end of the initial presentation, there will be a break for approximately 45 minutes for the Evaluation Committee to assess the presentation and prepare questions. The Offeror will then respond to questions from the Department's Evaluation Committee for no more than 90 minutes.

D.3.2 Schedule

The order of presentation will be selected randomly and the Offerors will be informed of their presentation date before the beginning of oral presentations. The Department reserves the right to reschedule any Offeror's presentation at the discretion of the contracting officer.

D.3.3 Offeror Attendees

The oral presentation will be made by the Offeror's personnel who will be assigned the key jobs for this project. Each Offeror will be limited to seven (7) persons. The job functions of the persons attending the presentation will be considered to be an indication of the Offeror's

assessment of the key areas of responsibility that are deemed essential to the successful completion of the project.

D.3.4 Topics

The Offeror may present information about its capabilities and special qualifications to serve as a Contractor for this Project, including the qualifications of key personnel.

D.4 Proposal Evaluation

Each proposal will be scored on a scale of 1 to 100 points. In addition, Offerors will be eligible to receive up to 12 preference points as described in **Section C.1** of this RFP for participation by Local, Small or Disadvantaged Business Enterprises. Thus, the maximum number of points possible is 112. The contract will be awarded to the Contractor with the highest evaluated score.

D.4.1 Experience & References (25 points)

The Department desires to engage a Roof Management Consultant with the experience necessary to realize the objectives set forth in this RFP. Offerors will be evaluated based on their demonstrated experience in: (i) managing roof assets, including operations and maintenance projects, capital roofing projects, and energy and sustainability roofing projects; (ii) knowledge of and experience with school, recreation, and other municipal facilities; (iii) knowledge of and experience with various types of roofing systems, including but not limited to green roofs and slate roofs; (iv) knowledge of and experience with the District of Columbia regulatory environment; (v) management of roofing projects as an owner's representative, program manager or similar role; and (vi) developing/utilizing an online application or database platform for managing roof or similar assets. If the Offeror is a team or joint venture of multiple companies, the Evaluation Panel will consider the experience of each member of the team or joint venture in light of their role in the proposed team or joint venture. This element of the evaluation will be worth up to twenty five (25) points.

D.4.2 Key Personnel (15 points)

The Department desires that senior personnel be assigned to this project who have experience in managing large roofing portfolios and completing the required work on-time and on-budget. At a minimum, the Roof Management Consultant should include: (i) the Program Manager/Principal in Charge; (ii) the Project Manager; (iii) the Lead Site Roof Surveyor/Consultant; (iv) Assistant Site Roof Inspectors; (v) the Lead Renewable Energy Specialist; and (vi) the Information Technology and Data Base Specialist. If other specialty consultants are required, please include their proposed roles. The Roof Management Consultant will not be permitted to reassign any of the key personnel unless the Department approves the proposed reassignment and/or the proposed replacement. Please provide a table that identifies the specific staff that will be assigned to this Project, where the proposed key personnel will be located, the time periods during which the individual will work on the

Project, and his or her level of effort (i.e. the percentage of time devoted to this project). Please explain how your staffing plan was developed – i.e., how many/what types of individuals and how many hours/days will generally be required for each contract task.

The availability and experience of the key individuals assigned to this project will be evaluated as part of this element. This element of the evaluation will be worth up to fifteen (15) points.

D.4.3 Management Plan (15 points)

Offerors are required to submit a Management Plan. The Management Plan should clearly explain how the Roof Management Consultant intends to manage the DGS roof portfolio both on a macro level and at an individual project level. The Management Plan should address how the Roof Management Consultant intends to complete the scope of work specified herein and manage coordination with the Department and the contractors engaged to complete Department roofing projects. To this end, the Management Plan shall (i) identify the key personnel and their specific roles in managing the project; (ii) identify how each of the tasks set forth in Sections B.1 through B.5 of this RFP will be achieved; and (iii) describe the key challenges inherent in this engagement and explain how they will be overcome or mitigated. The Management Plan should demonstrate a knowledge of the process and impediments that must be overcome and ensure that sufficient staffing will be provided.

In addition, the Roof Management Consultant shall include templates and completed samples of the following that it shall use throughout this engagement and explain how these will be utilized by the Roof Management Consultant in managing the roof portfolio and individual projects: (i) weekly project meeting minutes; (ii) change order recommendation memorandum; (iii) small purchase proposal review, recommendation and approval memoranda; (iv) monthly reports; and (v) payment application review and approval memo. The Roof Management Consultant shall also discuss how these documents have been used by the Roof Management Consultant in the past. In addition, the Management Plan shall outline what documents and files the Roof Management Consultant will maintain in managing the Department's projects.

The Department will also consider the experience that the Roof Management Consultant and its team members have working together on similar projects. This element of the evaluation is worth up to fifteen (15) points.

D.4.4 Cost (25 points)

Offerors will be required to quote a series of firm fixed prices for those elements of the Project with well-defined and established scopes, as well a series of hourly rates for those elements of the Project without well-defined scopes. This element of the evaluation is worth up to twenty five (25) points.

D.4.5 LSDBE Compliance/Utilization (10 points)

The Department desires the selected Roof Management Consultant provide the maximum level of participation for Local, Small and Disadvantaged Business Enterprises as well as employment opportunities for District of Columbia residents. Offerors will be evaluated in light of their demonstrated experience in meeting such goals and their proposed LSDBE Utilization Plan. This factor of the evaluation will be worth up to ten (10) points.

D.4.6 Workforce Utilization Plan (10 points)

The Department desires the selected Contractor to provide the maximum level of participation by District of Columbia residents in performing the work. As part of their proposals, Offerors must provide a Workforce Utilization Plan which demonstrates how it will identify qualified District residents to perform work on the project and increase participation by District residents. This element of the evaluation will be worth up to ten (10) points.

SECTION E PROPOSAL ORGANIZATION AND SUBMISSION

This section outlines specific information necessary for the proper organization and manner in which Offerors' Proposals should be proffered. References are made to other sections in this RFP for further explanation.

E.1 Submission Identification

Submissions shall be proffered in a full original proposal (pricing and technical submission); two (2) copies of the pricing proposal (Form of Offer Letter and any spreadsheets and/or other pricing document referenced in the Form of Offer Letter); and eight (8) copies of the technical portion of the proposals (i.e. all portions of the proposal excluding the Form of Offer Letter and any spreadsheet or other pricing document referenced in the Form of Offer Letter). Copies of the technical proposal should **not** include the Form of Offer Letter or any spreadsheet or other pricing document referenced in the Form of Offer Letter. The Offeror's original submission shall be placed in a sealed envelope conspicuously marked: "Proposal for Roof Management Services." Copies of the pricing and technical submissions shall be labeled accordingly.

E.2 Delivery or Mailing of Submissions

Submissions should be delivered or mailed to:

DC Department of General Services
Att'n: Kimberly Gray
Frank D. Reeves Center
2000 14th Street, NW, 8th Floor
Washington, DC 20009

E.3 Date and Time for Receiving Submissions

Submissions shall be received no later than 2:00 pm EDT, on May 14, 2015. The Offeror assumes the sole responsibility for timely delivery of its Submission, regardless of the method of delivery.

E.4 Submission Size, Organization and Offeror Qualifications

All submissions shall be submitted on 8-1/2" x 11" bond paper and typewritten. The CPM schedule may be on 11"x17" bond paper, but shall be folded to a size of 8-1/2" x 11". Telephonic, telegraphic, and facsimile submissions shall not be accepted. The Department is interested in a qualitative approach to presentation material. Brief, clear and concise material is more desirable than quantity. The submission shall be organized as follows:

E.4.1 Technical Proposal

The technical proposal shall be organized as follows:

E.4.1.1 Executive Summary

Each Offer should provide a summary of no more than three pages of the information contained in the following sections.

E.4.1.2 General Team Information and Firm(s) Data

Each Offeror should provide the following information for Contractor and each of its subconsultants.

- A. Name(s), address(es), and role(s) of each firm (including all sub-consultants)
- B. Firm profile(s), including:
 - i. Age
 - ii. Firm history(ies)
 - iii. Firm size(s)
 - iv. Areas of specialty/concentration
 - v. Current firm workload(s) projected over the next year
 - vi. Provide a list of any contract held by the Offeror where the contract was terminated (either for default or convenience). This list should also identify any contracts that resulted in litigation or arbitration between the Owner and the Offeror. If the Offeror has multiple offices, only contracts held by the office submitting this proposal need be listed.
- C. Description of the team organization and personal qualifications of key staff, including:
 - i. Identification of the single point of contact for the Contractor.
 - ii. Organizational chart illustrating reporting lines and names and titles for key participants proposed by the team.
 - iii. Resumes for each key participant on the team, including definition of that person's role, relevant project experience, and current workload over the next two years.

- iv. Experience that the key team members have working together.

E.4.1.3 Relevant Experience and Capabilities

- A. List all projects that the Offeror has worked on in the last 5 years that are similar to this project. For purposes of this paragraph, similar shall mean an engagement involvement management of roofing assets and associated maintenance and capital construction roofing projects with regard to a multi-asset portfolio having more than 500,000 square feet of roof. This information may be provided in an overview matrix format or brief list; however, it should identify the portfolio owner, describe the use of the assets (i.e. commercial, residential, governmental, manufacturing, etc.), the number of square feet of roofs under management.
- B. Detailed descriptions of no more than eight (8) projects that best illustrate the team's experience and capabilities relevant to this project. On each project description, please provide all of the following information in consistent order:
 - i. Project name and location
 - ii. Name, address, contact person and telephone number for owner reference
 - iii. Brief project description
 - iv. Identification of personnel involved in the selected project who are proposed to work on this project

E.4.1.4 Management Plan

Each Offeror should submit a Project Management Plan that addresses the issues set forth in Section D.4.3 of this RFP.

E.4.1.5 Local Business Utilization Plan

Each Offeror must submit a proposed Local Business Utilization Plan that identifies the specific certified business enterprises that will participate in the contract and their anticipated roles. In addition, each Offeror should provide: (i) a narrative description of similar projects and the Offeror's success in meeting such goals; and (ii) a chart, in summary form, that identifies the Offeror's major public projects over the last five years and its success in achieving such goals (creativity should be displayed regarding joint-venture and subcontractor agreements).

E.4.1.6 Workforce Utilization Plan

Each Offeror must submit a Workforce Utilization Plan that describes how the Offeror will increase participation by District residents in performing the labor necessary for the Project. The plan should set forth how specifically the Offeror will implement its plan to increase

participation by District residents. The Offeror shall also provide a chart, in summary form, that depicts the level of participation by District residents in past projects with the District.

E.4.2 Cost Proposal

The Cost proposal shall be organized as follows:

E.4.2.1 Bid Form

Each Offeror shall submit a bid form substantially in the form of **Attachment A**. Material deviations, in the opinion of the Department, from the bid form shall be sufficient to render the proposal non-responsive.

E.4.2.2 Disclosure Form

Each Offeror shall submit a Disclosure Statement substantially in the form of **Attachment B**.

E.4.2.3 Tax Affidavit

Each Offeror must submit a tax affidavit substantially in the form of **Attachment C**. In order to be eligible for this procurement, Offerors must be in full compliance with their tax obligations to the District of Columbia government.

SECTION F BIDDING PROCEDURES & PROTESTS

F.1 Contact Person

For information regarding this RFP please contact:

Thomas D. Bridenbaugh
Leftwich, LLC
1400 K Street, NW
Suite 1000
Washington, D.C. 20005
Phone: (202) 434-9100
Facsimile: (202) 783-3420

Any written questions or inquiries should be sent to Thomas Bridenbaugh at the address above.

F.2 Preproposal Conference

A preproposal conference will be held on April 27, 2015 at 10:30 a.m. EDT. The conference will be held at the Frank D. Reeves Center, 2nd Floor Community Room, 2000 14th Street, NW, Washington, DC 20009. Interested Offerors are strongly encouraged to attend.

F.3 Explanations to Prospective Offerors

Each Offeror should carefully examine this Request for Proposals and any and all amendments, addenda or other revisions, and thoroughly familiarize itself with all requirements prior to proffering a submission. Should an Offeror find discrepancies or ambiguities in, or omissions from, the RFP and amendments, addenda or revisions, or otherwise desire an explanation or interpretation of the RFP, any amendments, addenda, or revisions, it must submit a request for interpretation or correction in writing. Any information given to an Offeror concerning the solicitation shall be furnished promptly to all other Offerors as an amendment or addendum to this RFP if in the sole discretion of the Department that information is necessary in proffering submissions or if the lack of it would be prejudicial to any other prospective Offerors. Oral explanations or instructions given before the award of the contract shall not be binding.

Requests should be directed to Thomas Bridenbaugh at the address listed in Section F.1 no later than the close of business on May 7, 2015. The person making the request shall be responsible for prompt delivery.

F.4 Protests

Protests shall be governed by Section 4734 of the Department's Procurement Regulations (27 DCMR § 4734). Protests alleging defects in this solicitation must be filed prior to the time set for receipt of submissions. If an alleged defect does not exist in this initial RFP, but was

incorporated into the RFP by an amendment or addendum, a protest based on that defect must be filed before the next closing time established for proffering submissions. In all other cases, a protester shall file the protest within ten (10) days after the protester knows or should have known, whichever is earlier, of the facts and circumstances upon which the protest is based. All protests must be made in writing to the Department's Chief Contracting Officer ("CCO") and must be filed in duplicate. Protests shall be served on the Department by obtaining written and dated acknowledgment of receipt from the Department's CCO. Protests received by the Department after the indicated period shall not be considered. To expedite handling of protests, the envelope shall be labeled "Protest".

This section is intended to summarize the bid protest procedures and is for the convenience of the Offerors only. To the extent any provision of this section is inconsistent with the Procurement Regulations, the more stringent provisions shall prevail.

F.5 Contract Award

This procurement is being conducted in accordance with the provisions of Section 4712 of the Department's Procurement Regulations (27 DCMR § 4712).

F.6 Retention of Submissions

All submissions shall be retained by the Department and therefore shall not be returned to the Offerors. With the exception of proprietary financial information, the submissions shall become the property of the Department and the Department shall have the right to distribute or use such information as it determines.

F.7 Examination of Submissions

Offerors are expected to examine the requirements of all instructions (including all amendments, addenda, attachments and exhibits) in this RFP. Failure to do so shall be at the sole risk of the Offeror and may result in disqualification.

F.8 Late Submissions: Modifications

- A. Any submission or best and final offer received at the office designated in this RFP after the exact time specified for receipt shall not be considered.
- B. Any modification of a submission, including a modification resulting from the CCO's requests for best and final offers, is subject to the same conditions as in F.8.A stated above.
- C. The only acceptable evidence to establish the time of receipt at the Department's office is the time-date stamp of such installation on the submission wrapper or other documentary evidence of receipt maintained by the installation.

- D. Notwithstanding any other provisions of this Request for Proposals to the contrary, a late modification of an otherwise successful submission which makes its terms more favorable to the Department may be considered at any time it is received and may be accepted.
- E. Submissions shall be irrevocable and remain in full force and effect for a period not less than 120 days after receipt of submissions.

F.9 No Compensation for Preparation of Submissions

The Department shall not bear or assume any financial obligations or liabilities regarding the preparation of any submissions submitted in response to this RFP, or prepared in connection therewith, including, but without limitation, any submissions, statements, reports, data, information, materials or other documents or items.

F.10 Rejection of Submissions

The Department reserves the right, in its sole discretion:

- A. To cancel this solicitation or reject all submissions.
- B. To reject submissions that fail to prove the Offeror's responsibility.
- C. To reject submissions that contain conditions and/or contingencies that in the Department's sole judgment, make the submission indefinite, incomplete, otherwise non-responsive, or otherwise unacceptable for award.
- D. To waive minor irregularities in any submission provided such waiver does not result in an unfair advantage to any Offeror.
- E. To take any other action within the applicable Procurement Regulations or law.
- F. To reject the submission of any Offeror that has submitted a false or misleading statement, affidavit or certification in connection with such submission or this Request for Proposals.

F.11 Limitation of Authority

Only a person with prior written authority from the CCO shall have the express, implied, or apparent authority to alter, amend, modify, or waive any clauses or conditions of the contract. Furthermore, any alteration, amendment, modification, or waiver of any clause or condition of this RFP is not effective or binding unless made in writing and signed by the CCO or its authorized representative.

F.12 Non-Responsive Pricing

In general, the Department will consider a proposal non-responsive if Offeror's price is greater than 150% of the median price submitted by other Offerors. The Department reserves the right to deem a proposal non-responsive if Offeror's price is greater than 150% of the independent government estimate.

SECTION G INSURANCE REQUIREMENTS

G.1 Required Insurance

The Contractor will be required to maintain the following types of insurance throughout the life of the contract. The Contractor shall be responsible for the payment of all costs associated with the required insurance, including any and all premiums and, in the case of a claim, any applicable deductible.

G.1.1 Commercial general public liability insurance (“Liability Insurance”) against liability for bodily injury and death and property damage, such Liability Insurance to be in an amount not less than Three Million Dollars (\$3,000,000) for liability for bodily injury, death and property damage arising from any one occurrence and Three Million Dollars (\$3,000,000) from the aggregate of all occurrences within each policy year.

G.1.2 Workers’ compensation and Employers Liability coverage providing statutory benefits for all persons employed by the Offeror, or its contractors and subcontractors at or in connection with the Work.

G.1.3 Automobile Liability, including Hired and Non-Owned Auto Liability in the amount of at least One Million Dollars (\$1,000,000) for each occurrence for bodily injury and property damage.

G.2 Additional Insureds

Each insurance policy shall be issued in the name of the Contractor and shall name as additional insured parties the Department and the District of Columbia, and shall not be cancelable or reduced without thirty (30) days prior written notice to the Department.

G.3 Waiver of Subrogation

All such insurance shall contain a waiver of subrogation against the Department and the District of Columbia, and their respective agents.

G.4 Strength of Insurer

All insurance shall be placed with insurers that are reasonably acceptable to the Department and with an A.M. Best’s rating of not less than A- (Excellent) and a surplus size of not less than XV. All such insurers shall be licensed/approved to do business in the District of Columbia.

Attachment A

Form of Offer Letter

Attachment A

[Offeror's Letterhead]

[Insert Date]

District of Columbia Department of General Services
2000 14th Street, NW
Washington, DC 20009

Att'n: Mr. Jonathan Kayne
Interim Director

Reference: Request for Proposals
Roof Management Services

On behalf of [INSERT NAME OF BIDDER] (the "Offeror"), I am pleased to submit this proposal in response to the Department of General Services' (the "Department" or "DGS") Request for Proposals (the "RFP") to provide Roof Management Services. The Offeror has reviewed the RFP and the attachments thereto, any addenda thereto, and the proposed Form of Contract (collectively, the "Bid Documents") and has conducted such due diligence and analysis as the Offeror, in its sole judgment, has deemed necessary in order to submit its Proposal in response to the RFP. The Offeror's proposal and the Firm Fixed Prices (as defined in paragraph A), and the Hourly Rates (as defined in paragraph B) are based on the Bid Documents as issued and assume no material alteration of the terms of the Bid Documents (collectively, the proposal, the Firm Fixed Prices, and the Hourly Rates are referred to as the "Offeror's Bid").

The Offeror's Bid is as follows:

A. The Firm Fixed Prices are: \$ see attached spreadsheet

The Hourly Rates are: \$ see attached spreadsheet

The Offeror acknowledges and understands that the Firm Fixed Prices are firm, fixed prices to cover all overhead, profit and all other costs incurred by the Offeror in performing the tasks on which the Firm Fixed Prices are based and that such amount includes funding for work which is not described in the RFP and attachments thereto but which is reasonably inferable therefrom. The Offeror further acknowledges and understands that the Hourly Rates set forth above are fixed, loaded rates to fully complete the work described in the RFP. It is understood that other than the cost of parts and materials, such rates will be the Offeror's sole compensation for work performed and includes adequate amounts to cover the Offeror's labor, field equipment, overhead, insurance and profit.

The Offeror's Bid is based on and subject to the following conditions:

Mr. Jonathan Kayne

[DATE]

Page 2 of 2

1. The Offeror agrees to hold its proposal open for a period of at least sixty (60) days after the date of the bid.

2. Assuming the Offeror is selected by the Department and subject only to the changes requested in paragraph 5, the Offeror agrees to enter into a contract with the Department on the terms and conditions described in the Bid Documents within ten (10) days of the notice of the award.

3. Both the Offeror and the undersigned represent and warrant that the undersigned has the full legal authority to submit this bid form and bind the Offeror to the terms of the Offeror's Bid. The Offeror further represents and warrants that no further action or approval must be obtained by the Offeror in order to authorize the terms of the Offeror's Bid.

4. The Offeror and its principal team members hereby represent and warrant that they have not: (i) colluded with any other group or person that is submitting a proposal in response to the RFP in order to fix or set prices; (ii) acted in such a manner so as to discourage any other group or person from submitting a proposal in response to the RFP; or (iii) otherwise engaged in conduct that would violate applicable anti-trust law.

5. The Offeror's proposal is subject to the following requested changes to the Form of Contract: **[INSERT REQUESTED CHANGES. OFFERORS ARE ADVISED THAT THE CHANGES SO IDENTIFIED SHOULD BE SPECIFIC SO AS TO PERMIT THE DEPARTMENT TO EVALUATE THE IMPACT OF THE REQUESTED CHANGES IN ITS REVIEW PROCESS. GENERIC STATEMENTS, SUCH AS "A MUTUALLY ACCEPTABLE CONTRACT" ARE NOT ACCEPTABLE. OFFERORS ARE FURTHER ADVISED THAT THE DEPARTMENT WILL CONSIDER THE REQUESTED CHANGES AS PART OF THE EVALUATION PROCESS.]**

6. The Offeror hereby certifies that neither it nor any of its team members have entered into any agreement (written or oral) that would prohibit any contractor, subcontractor or subconsultant that is certified by the District of Columbia Office of Department of Small and Local Business Enterprises as a Local, Small, Resident Owned or Disadvantaged Business Enterprise (collectively, "LSDBE Certified Companies") from participating in the work if another company is awarded the contract.

7. This bid form and the Offeror's Bid are being submitted on behalf of [INSERT FULL LEGAL NAME, TYPE OF ORGANIZATION, AND STATE OF FORMATION FOR THE OFFEROR].

Sincerely,

By: _____

Name: _____

Its: _____

DELIVERABLE ITEM	Base Year	Option Year 1	Option Year 2
B.6.1 Operation and Maintenance of Roof Systems			
B.6.1.1 Roof Surveys, Inspections and Roof Information Database (Entire DGS Portfolio – Firm Fixed Price)			
B.6.1.2 Condition Assessment Reports for Each Bldg (Entire DGS Portfolio – Firm Fixed Price)			
B.6.1.3 Annual Preventive Maintenance and Minor Repair and Update System Database (Entire DGS Portfolio – Firm Fixed Price)			
B.6.1.4 Preventive Maintenance Checklists for Each Roof Section (Entire DGS Portfolio – Firm Fixed Price)			
B.6.1.5 24/7 Manage Leak Response Desk and Provide Status Reports (Annual 12-month Firm Fixed Price)			
B.6.1.5 24/7 Leak Response – Field Verification of Contractor Work (T&M based on labor rates set below)			
B.6.1.6 Quarterly Green Roof Maintenance and provide Status Reports (Annual 12-month - Firm Fixed Price for 4 visits per year)			
B.6.1.7 Slate Roof Assessment and Condition Assessment Reports (entire slate portfolio – Firm Fixed Price)			
B.6.2 Capital Requirements for Roof Systems			
B.6.2.1 Design and Specification/Bid Package (Percentage of Estimated Construction Cost)			
B.6.2.2 Construction Quality Assurance Reports (Per Project – Firm Fixed Price)			
B.6.2.3 Project Safety Audit Report (Per Project – Firm Fixed Price)			
B.6.2.4 Construction Observation (T&M with not to exceed using labor rates as established below)			
B.6.2.5 Corrective Maintenance (annual firm fixed price for entire DGS portfolio)			
B.6.2.6 Support Design and Construction Management Contracts (T&M with not to exceed using labor rates as established below)			
B.6.2.7 Roof Asset Management Plan (RAMP) (annual cost for entire DGS portfolio – firm fixed price)			
B.6.3 Energy and Sustainability Support			
B.6.3.1 Building Envelope Energy Conservation Assessments (Firm Fixed Price per Building)			
For buildings up to 25,000 SF			
Buildings from 25,001 –50,000 SF			
Buildings from 50,001 – 100,000 SF			
Buildings above 100,001 SF			
B.6.3.2 PV and Solar Thermal Assessments and Feasibility Studies (Firm Fixed Price per Building)			
For buildings up to 25,000 SF			
Buildings from 25,001 –50,000 SF			
Buildings from 50,001 – 100,000 SF			
Buildings above 100,001 SF			

B.6.3.3 Green Roof Opportunity Assessments (Firm Fixed Price per Building)			
For buildings up to 25,000 SF			
Buildings from 25,001 –50,000 SF			
Buildings from 50,001 – 100,000 SF			
Buildings above 100,001 SF			
B.6.4 Online Roof/Energy Information System and Database			
Annual License Fee to Include all Support and Updates			
B.6.5 Professional Development and Workforce Development			
Annual Firm Fixed Price to Include all Activities included in Respondent’s Proposal			
B.6.6 Monthly Status Reports			
Annual Firm Fixed Price for Entire Contract			
Key Personnel (HOURLY RATES)	Base Year	Option Year 1	Option Year 2
Program Manager/Principal in Charge			
Project Manager			
Lead Site Roof Surveyor/Consultant			
Assistant Site Roof Inspectors			
Renewable Energy Specialist			
Information Technology and Data Base Specialist			
[LIST OTHERS IF APPLICABLE]			

Attachment B

Disclosure Statement

Attachment B

The Offeror and each of its principal team members, if any, must submit a statement that discloses any past or present business, familiar or personal relationship with any of the following individuals:

A. D.C. Department of General Services

Jonathan Kayne	Interim Director
Camille Sabbakhan	General Counsel
Charles J. Brown, Jr.	Deputy General Counsel
Spencer Davis	Associate Director, Facilities Management
Latrena Owens	Chief of Staff
Jeff Bonvechio	Deputy Director, Capital Projects and Facilities Management
Mark Chambers	Associate Director, Sustainability & Energy

Please identify any past or present business, familiar, or personal relationship in the space below. Use extra sheets if necessary.

B. Leftwich, LLC

Thomas D. Bridenbaugh

Please identify any past or present business, familiar, or personal relationship in the space below. Use extra sheets if necessary.

C. Brailsford & Dunlavey
McKissack & McKissack
Kramer Consulting Services, P.C.
Heery International, Inc.

Please identify any past or present business, familiar, or personal relationship in the space below. Use extra sheets if necessary.

This is to certify that, to the best of my knowledge and belief and after making reasonable inquiry, the above represents a full and accurate disclosure of any past or present business, familiar, or personal relationship with any of the individuals listed above. The undersigned acknowledges and understands that this Disclosure Statement is being submitted to the False Claims Act and that failure to disclose a material relationship(s) may constitute sufficient grounds to disqualify the Offeror.

OFFEROR:

By: _____
Name: _____
Title: _____
Date: _____

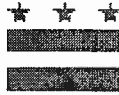
Attachment C

Tax Affidavit

GOVERNMENT OF THE DISTRICT OF COLUMBIA

Office of the Chief Financial Officer

Office of Tax and Revenue



TAX CERTIFICATION AFFIDAVIT

THIS AFFIDAVIT IS TO BE COMPLETED ONLY BY THOSE WHO ARE REGISTERED TO CONDUCT BUSINESS IN THE DISTRICT OF COLUMBIA.

Date

**Authorized Agent
Name of Organization/Entity
Business Address (include zip code)
Business Phone Number**

**Authorized Agent
Principal Officer Name and Title
Square and Lot Information
Federal Identification Number
Contract Number
Unemployment Insurance Account No.**

I hereby authorize the District of Columbia, Office of the Chief Financial Officer, Office of Tax and Revenue to release my tax information to an authorized representative of the District of Columbia agency with which I am seeking to enter into a contractual relationship. I understand that the information released will be limited to whether or not I am in compliance with the District of Columbia tax laws and regulations solely for the purpose of determining my eligibility to enter into a contractual relationship with a District of Columbia agency. I further authorize that this consent be valid for one year from the date of this authorization.

I hereby certify that I am in compliance with the applicable tax filing and payment requirements of the District of Columbia. The Office of Tax and Revenue is hereby authorized to verify the above information with the appropriate government authorities.

Signature of Authorizing Agent

Title

The penalty for making false statement is a fine not to exceed \$5,000.00, imprisonment for not more than 180 days, or both, as prescribed by D.C. Official Code §47-4106.