



Office of Physical Plant  
Physical Plant Building  
University Park, PA 16802-1118

Date: February 19, 2020

Re: **Roof Inspection Request for Proposal**  
Roof Condition Assessments  
University Park  
The Pennsylvania State University

To: Prospective Consultants

The Office of Physical Plant at The Pennsylvania State University (“University”) is seeking a qualified professional consultant to perform condition assessments on various roofs at University Park campus as detailed below.

In 2012, the University completed a comprehensive initial assessment of Education and General (E&G) building roofs on the University Park Campus for the purpose of strategic maintenance and capital planning decision making, with the intention of performing regular reassessments to monitor their performance and continuously re-prioritize repair and replacement activities based on actual conditions. The selected professional will conduct condition re-assessments of these roofs and conduct initial assessments on additional roofs, as required.

Condition assessments include electronic data collection on defects and confirmation of existing inventory data (roof type, etc.) of approximately 1.8 million square feet of roofs within the University Park Campus E&G building portfolio. Additional roof sections may be added at a later date by other Business Units (Intercollegiate Athletics, Auxiliary Business Services, Commonwealth Campus’, etc.). If pursued, any added roof sections will be processed as an Amendment to the consultant’s Agreement based on the fee proposed plus applicable reimbursable expenses.

It is important to note that the consultant is responsible for data collection only. PSU has developed specific, comprehensive assessment methodology, criteria and standards for evaluation of roof systems. Data shall be collected using software applications provided by the University. As such, **the University is not seeking, nor will accept, proprietary systems for data collection and management**. The consultant shall provide their own smart devices capable of running ArcGIS Survey 123 and/or Collector applications. These applications are available for free on Apple, Android and Windows devices. Access to the University’s ArcGIS databases and other applicable online accounts will be provided by the University. By responding to this Request for Proposals, the consultant agrees that the University retains all rights to the data, means and methods of the data collection, calculations, platforms, etc. and the consultant is not permitted to utilize this information outside of this project or work with the University.

Each assessor shall have a minimum of three (3) years experience conducting roof condition assessments. The project team shall consist of at minimum one (1) Registered Roof Consultant (RRC) or Registered Roof Observer (RRO) who is responsible for the review and approval of all condition assessment reports.

Project kickoff will include training of the consultant's team consisting of up to six (6) hours of classroom-style training and two days of rooftop training by Penn State staff on University-specific data collection, expectations, technical training on use of the application, etc.

The consultant is required to lead bi-weekly conferences for the duration of the assessments to provide progress updates to a variety of University stakeholders including Work Control, Project Management, Design Services, Campus Planning & Design, Building & Grounds, and Trade Supervisors. At any point during the course of the assessments the consultant must notify PSU immediately if any conditions are observed that may be deemed unsafe to public health, safety or welfare.

At the conclusion of the initial scope, the consultant shall facilitate a project wrap-up in person. This shall include a final presentation to provide overview of findings, recommendations and review of data output.

The consultant is required to provide all means for safe access including personal protective equipment (PPE), lifts and operators. The consultant is not permitted to use University equipment.

Core cuts and other means of destructive testing are not included in this scope of work.

#### Response Conditions

All proposals shall be submitted in accordance with the attached **Proposal Submission Requirements**.

The entirety of the submission shall not exceed ten (10), 8 ½ x 11 pages submitted electronically only. Hard copies will not be accepted. It is necessary that you provide us with the information requested in the **Proposal Submission Requirements** in the order requested. This will provide uniform information on all firms for evaluation. We encourage you to be as brief as possible without sacrificing accuracy and completeness.

The University reserves the right to waive any informality in any or all submissions, and to reject or accept any submission or portion thereof. In submitting a response to this request the Professional is acknowledging that they concur with, without exception, the terms, conditions, and provisions as contained in the University's "Form of Agreement 1-S". The current version of document can be found on the OPP website.

Responses are to be submitted in .pdf format via email to my attention at [cmp33@psu.edu](mailto:cmp33@psu.edu). Reference "*PSU Roof Condition Assessment Services [your firm's name here]*" as the subject line of your email. The electronic .pdf letter of interest is due by 12:00-noon, local time, on **March 4, 2020** (Submissions that are received after 12:00-noon on March 4, 2020 may be barred from further consideration).

The University will use a qualifications-based selection process and reserves the right to interview shortlisted firms, if warranted.

If you have any questions regarding this request please submit **in writing** to [cmp33@psu.edu](mailto:cmp33@psu.edu) no later than **12:00-noon on February 26, 2020**.

We appreciate your interest in preparing this material and look forward to your submission.

Sincerely,

*Christie M. Holloway*

Christie M. Holloway, P.E.

Project Manager, Design and Construction

## Proposal Submission Requirements

### Request for Proposals

#### Roof Condition Assessment Services

1. **Project Team**

Elaborate on the qualifications and experience of the lead team members to be assigned to this project, including each assessor. Ensure all individuals proposed meet the minimum requirements outlined previously. Provide a clear indication of the roles to be performed by each **individual**. Be very specific regarding the personal involvement and participation of each **individual**. An **organization chart** is preferred as a visual.
2. **Project Specific Approach and Staffing Plan**

Detail your **project specific approach** and how your approach will best serve the University and its goals. This shall include a project-specific staffing plan that demonstrates your proposed approach and staff meet the anticipated needs in the current proposed schedule. As a reminder, the University is providing our own methodology and software applications for data collection. The University is not seeking, nor will entertain, proposals that include other means or methods of data collection, including proprietary software.
3. **Relevant Projects**

Highlight at least three (3) relevant projects completed within the past five (5) years that the proposed individuals participated on that convey your team's expertise with roofing condition assessments. Clearly outline the similarities between those projects and this particular project, including standards used and stakeholders involved. Outline specific lessons-learned that you plan to apply to this project from your previous experience. Provide client references for each project, ensuring that their email and telephone numbers are current.
4. **Schedule**

Provide a proposed milestone schedule for this project in graphic form including a detailed task list for each phase and proposed milestone deliverables. Assume the Notice to Proceed will be issued no earlier than April 2020 and work shall conclude August 2020. Identify on the graphic schedule when certain team members will participate in the various tasks and milestones.
5. **Fee** – Provide a cost per square foot fee for the scope of work.
6. **Reimbursable Expenses** – Provide a non-binding estimate of reimbursable expenses inclusive of items outlined in this Request for Proposals including means for safe access (PPE, lifts, operators, etc.), to be negotiated and finalized at a later date. Reimbursable Expenses, if applicable, will be billed without markup. Refer to limitations of the 1-S agreement.
7. **Rate Schedule** – Submit a schedule of hourly rates by employee classification, including key personnel names proposed for this project. Identify what type of expenses will be charged outside of the cost-per-square-foot fee quoted above (refer to limitation of the 1-S agreement). Expenses, if applicable, will be billed without markup.