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Header 1

List View

General Information | [Contact](#) | [Default Values](#) | [Discount](#) | [Document Information](#) | [Clarification Request](#)

Procurement Folder: 1220208

Procurement Type: Central Purchase Order

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Legal Name: Roth IAMS LLC

Alias/DBA:

Total Bid: \$0.00

Response Date:

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First Name:

Last Name:

Email:

Phone:

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Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

**State of West Virginia
Solicitation Response**

Proc Folder: 1220208
Solicitation Description: EOI- BUILDER Site Assessments & Facility Inspections
Proc Type: Central Purchase Order

Solicitation Closes	Solicitation Response	Version
2023-05-11 13:30	SR 0603 ESR05112300000005746	1

VENDOR
VS0000043030
Roth IAMS LLC

Solicitation Number: CEOI 0603 ADJ2300000004
Total Bid: 0 **Response Date:** 2023-05-11 **Response Time:** 09:58:08
Comments: No pricing is included in this CEOI response, so discounts are N/A.

FOR INFORMATION CONTACT THE BUYER
David H Pauline
304-558-0067
david.h.pauline@wv.gov

Vendor Signature X **FEIN#** **DATE**

All offers subject to all terms and conditions contained in this solicitation

Line	Comm Ln Desc	Qty	Unit Issue	Unit Price	Ln Total Or Contract Amount
1	EOI- BUILDER Site Assessments & Facility Inspections				0.00

Comm Code	Manufacturer	Specification	Model #
81101508			

Commodity Line Comments: No pricing included in this GEOI response.

Extended Description:

Provide professional engineering services for the BUILDER Sustainment Management System Implementation, including Site Assessments & Facility Inspections, for facilities throughout WV, per the attached documentation.



**Submission to The West Virginia Purchasing
Division**

**For the agency, the West Virginia Army
National Guard, Construction and Facilities
Management Office**

EXPRESSION OF INTEREST – CEOI ADJ23*04

May 11, 2023



Roth IAMS LLC.
800-360 Central Avenue, St. Petersburg, FL, USA 33701
www.rothiams.com
Proposal No. P23013

Roth IAMS

Integrated Asset Management Strategies

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APPENDICES

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1 INTRODUCTION

Roth IAMS LLC (Roth IAMS) is pleased provide the The West Virginia Purchasing Division for the agency, the West Virginia Army National Guard, Construction and Facilities Management Office (the “Agency”), with this proposal in response to the Expression of Interest for BUILDER Site Assessments & Facility Inspections – CEOI ADJ23*04.

Completed copies of the following forms extracted from the RFP document have been attached in **Appendix 1**:

- State of West Virginia, Centralized Expression of Interest

For the purposes of our response, Roth IAMS will utilize the term Facility Condition Assessment (FCA) to represent the Building Site Assessments & Facility Inspections terminology presented in the CEOI documents.

2 COMPANY PROFILE

Roth IAMS, operating in the United States as Roth IAMS LLC (A Delaware Limited Liability Corporation) and in Canada as Roth IAMS Ltd. (Federally Incorporated) formed for the sole purpose of providing Facility and Infrastructure Assessment and Asset Management Services for large and/or geographical diverse portfolios across North America. For the purpose of this proposal, the primary contact is as follows:

Kyle Christiansen, Vice President, United States
600 Humberson Lane, Frederick, MD 21073
813-379-9345 ext. 302
kyle.christiansen@rothiams.com

2.1 WHY ROTH IAMS

Imagine a world where your facility asset management and capital plans were based on consistent and defensible data. *Imagine* that there was a way you could have all the data that you need to make informed decisions right at your fingertips. *Imagine* not being stressed that your organization is underfunded and unequipped to deal with the politics and pressures when it comes to capital planning. *Imagine* having the capability to make better business decisions. *Imagine* your organization’s buildings and assets just being...better.

To take the first step in making this your reality, please consider partnering with Roth IAMS to provide you with the FCAs for your portfolio. The rest of our proposal will highlight to you how our team has guided clients just like you through a project similar to this.

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2.2 OUR VISION & CORE VALUES

At Roth IAMS our vision is “**To Solve the World’s Deferred Capital Renewal and Maintenance (DCRM) Backlog Crisis**”.

At Roth IAMS we live our core values in every interaction that we have with our clients and each other.

- **Collaborative** – Only by understanding each other and our uniqueness can we tailor the best solutions for our clients.
- **Passionate** – Our love for what we do and why we do it drives us towards excellence.
- **Consistently Curious** – We are always seeking knowledge and challenging the status quo.

We trust that these values will come through in the information outlined in this proposal. We truly believe that these values set us apart from other organizations that provide the same services we do. We look forward to putting our vision and core value to work with the Agency on this important project.

Throughout this proposal we will demonstrate our team’s breadth and depth of experience that provides the Agency with a unique value should we be selected to collaborate on this important project. We believe that the following differentiates us from our competition:

2.3 OVERVIEW OF SERVICES AND COMPANY SIZE

Our team includes over 100 full-time staff members including Architects, Engineers, Geoscientists, Technologists Technicians and Facility Management Professionals whose shared vision is to solve the world’s deferred capital renewal and maintenance backlog crisis.

Roth IAMS core business is FCAs. We are not a design firm that does FCAs in its spare time. We are not an engineering company that does FCAs for a chance to work on the renewal projects. We are not a software company that is trying to sell software licenses.

In addition to our assessment expertise, our team members have extensive expertise working with clients to utilize their existing facility assessment and other technical data (e.g., environmental, energy, functional, sustainability, etc.) to design and execute capital renewal programs and Asset Management Plans. We also provide the following services outlined in Table 1 below:

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Table 1 - Our Services	
<p>Asset Management</p> <ul style="list-style-type: none"> • Asset Management Planning • Capital Renewal Planning • Asset Management Database Maintenance • Asset Management Software • Data Mining and Analytics 	<p>Asset Data Collection</p> <ul style="list-style-type: none"> • Facility Condition Assessments • ADA Assessments • Energy Auditing and Consulting • Asset Inventory and Tagging
<p>Facilities Management</p> <ul style="list-style-type: none"> • Preventative Maintenance Planning • Facilities Management Plans and Consulting • Green Building Strategies, Policies and Procedures 	<p>Building Performance</p> <ul style="list-style-type: none"> • Building Performance Check-Up • Commissioning • Re/Retro-commissioning

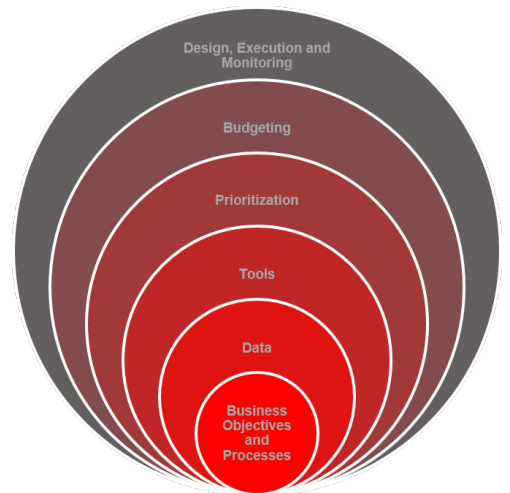
2.4 PROCUREMENT POWERED BY SOURCEWELL

Roth IAMS was selected by Sourcewell as the highest ranked proponent in North America out of 18 bidders on the Facility Assessment and Planning Services contract. For more information about our industry leading partnership with Sourcewell, please visit www.sourcewell-mn.gov/cooperative-purchasing/020421-rth.



2.5 OUR PHILOSOPHY

Traditional Asset Management has been executed through silos within organizations, with each department responsible for its own asset type (buildings, roads, water/wastewater, etc.) or a specific discipline associated with an asset (capital, maintenance, environmental, energy, etc.), and has focused on short term vs long term goals. Based on our experience, this approach results in lost opportunity for asset and financial optimization. We believe that by collaborating with all stakeholders, an integrated strategy will result in a more efficient (lower capital costs) and effective (better business outcomes for invested capital) allocation of capital dollars, while leveraging assets towards the overall goals of our client.



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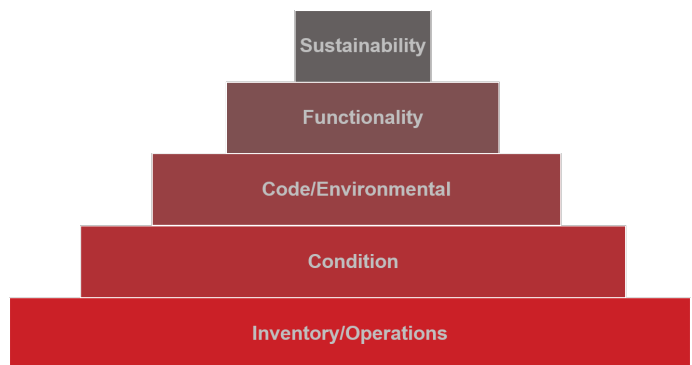
We understand that some of the aspects of the Integrated Asset Management Framework outlined below are beyond the scope of work for this project. However, we felt that it would provide greater context to our approach to include the entire framework.

2.5.1 Business Objectives and Processes

To support the business-focus of any Asset Management Framework, it must be founded on current and long-term Business Objectives and Business Processes. All decisions and plans must further the overall client objectives and be feasible within the corporate structure that is driven by business processes. In addition, while ensuring tactical strategies to address near-term needs, it is critical to ensure that the focus on the long-term strategies is not forgotten.

2.5.2 Data

Reliable data is the integral part of understanding any issue related to an existing asset, whether that be condition data, regulatory/code liability, performance, space utilization, energy consumption, etc. For an organization to determine the optimal data required, it needs to focus on the desired project outcome(s). The type of data



collected, the necessary level of detail, and the team or teams responsible for collecting it will all impact the downstream ability to plan based on the data, and the overall project costs. For a project to be successful, the project team must understand the current state of data, and to develop a framework going-forward to allow data collection to be done in alignment with our client's existing Asset Management Framework.

The foundation of any sustainable buildings program is the comparison of the performance or design of capital assets against current industry standards and best practices. What gets measured can be managed. The collection of the appropriate data can allow for benchmarking of current performance, the establishment of reasonable targets for improvement, and the monitoring of progress towards these goals.

2.5.3 Tools

With a clear picture of the type and amount of data that will be required, the next critical factor is related to the tools that will be used to store, manage and manipulate the data. If the dataset is relatively limited a spreadsheet may meet a client's functionality needs. However, for a large, complex set of data, or where sophisticated prioritization and business case development is required, more robust tools will be required to provide the desired analysis. For the purposes of this project, Roth IAMS staff will use the BUILDER software for data collection and reporting.

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2.5.4 Prioritization

The Competition for Capital continues to increase for portfolio owners/managers as assets age, energy/resource prices rise, and government regulation becomes more intense. The simplistic “High, Medium and Low” prioritization methodologies employed are no longer sufficient to manage portfolio risks.

Almost all organizations have a significant deferred maintenance backlog and lack the capital required to address even its “High” needs, not to mention Medium or Low priorities. As such, for complex, diverse portfolios we recommend a more robust priority scheme based on weightings and algorithms supported by overall corporate business objectives. In this way mission critical assets can rightly access higher levels of funding than support assets. Demographics, functional adequacy, energy performance and other key issues that impact business can be built into the priority scheme.

2.5.5 Budgeting

At this stage of the process, we shift from a highly technical focus (collecting, managing and manipulating building data) that is generally within the comfort zone of the staff responsible for the maintaining the assets and who have a grasp of its complexity. To effectively communicate with the senior executives who will fund the asset management program it is vital that we “translate” all the technical data into a high-level financial and risk-based discussion.

2.5.6 Design, Execution and Monitoring

With the technical requirements clearly communicated, budgets in-place it is time to move the program forward from the planning stage to the design and construction phases. There are two areas of focus that are sometimes overlooked during renewal projects, which are critical to the development of an on-going asset management program. These are commissioning and post project operational monitoring.

Commissioning provides confirmation that the mechanical systems have been installed and are operating as they were designed and should allow for the achievement of the overall goals of the proposed work plan. Post-project operational monitoring also provides additional data to demonstrate that a project achieves the specific results (e.g. energy savings, improved ventilation, etc.) it was designed to. Each of these processes creates additional data that can be fed back into the framework at the foundation to allow for on-going asset management.

3 QUALIFICATIONS, EXPERIENCE AND PAST PERFORMANCE

3.1 COMPANY EXPERTISE

Throughout this proposal we will demonstrate our team's breadth and depth of experience that provides the Agency with a unique value should we be selected to collaborate on this important project. We feel the following differentiates us from our competition:

3.1.1 Condition Assessment Expertise

Our team of experienced project managers and site assessment professionals have unparalleled expertise in delivering consistent and defensible condition assessment data that has assisted our clients in securing over **\$5 Billion** in additional renewal funding for their existing buildings. In addition to our FCA expertise, our team members have extensive expertise working with clients to utilize their FCA and other technical data (e.g., environmental, energy, functional, sustainability, etc.) to design and execute capital renewal programs.

The key staff members involved in Roth IAMS have collaborated on projects for nearly 30 years ensuring our clients that our team will work together seamlessly to achieve the collective project team goals. Our team members have been involved in delivering FCAs for over **24,000** properties.

3.1.2 Proposed Team Member Experience

The key members of our proposed project team have been involved in over 24,000 FCAs. The scope of work that we are proposing is based on a foundation that has been refined over 30 years. Our team will configure our approach to meet the Agency's goals and objectives for the project, while delivering consistent and defensible asset condition data.

Roth IAMS has all the required resources in-house so Agency does not have to be concerned about any inter-company issues as all resources fall under the supervision of our Project Management team.

3.1.3 Understanding of State/Provincial Government Asset Management

Through the extensive collective project experience of our team, we have been exposed to a wide range of issues and concerns that face Municipal/Regional governments. Our projects have included FCAs, Reserve Fund Studies (RFSs), Accessibility Assessments, Equipment Inventory & Tagging and Energy Audits, but have also included Asset Management Framework and Plan Development, Capital Planning and Organizational Consulting. This diverse experience gives us a real-world understanding of the municipal sector that will be applied throughout this project.

3.1.4 Proposed Pilot Program

Roth IAMS always recommends that each large portfolio project include a Pilot Program at the outset. By completing the entire scope of work on a small sample of buildings, we are able to validate the assumptions of all stakeholders and develop an agreed approach that will then be applied to all the remaining buildings across the portfolio. This approach

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generally requires additional time at the project outset, but in our experience, saves considerable time at later stages of the project by avoiding costly revisions to a large number of reports, and potential remobilization to sites.

3.1.5 Recognition by Leaders in Facility Asset Management

Roth IAMS has been awarded multi-year FCA contracts by some of North America's largest governmental agencies. Roth IAMS is currently completing a 5-Year Program where our team will assess all Ontario College and Ontario University facilities, which includes a portfolio of over 140 million square feet of active educational space. Additionally, we are collaborating with the City of Vancouver, the City of Calgary, Infrastructure Ontario and the Government of Saskatchewan Ministry of Central Services on multiyear FCA projects for their portfolios of diversified facilities.

3.1.6 Asset Management Expertise

Roth IAMS has a primary focus of assisting institutions design, execute and monitor Integrated AM Plans and Strategies. Our proposed project team has collaborated with some of the largest public sector clients across North America to align their FCA and AM Programs.

Our project work has included the development of Multi-year Integrated Capital Plans, Municipal Asset Management Plans (AMPs), AM Policy Development, AM Framework Development, Multivariable Prioritization Development and On-Going Data Management and Strategies.

We believe that AM must look at assets in a holistic way and go beyond just condition. The best asset investments can only be made when clients view their portfolios with a whole-asset approach to understanding all the competing factors that impact asset performance (condition, regulatory concerns, environmental concerns, functional/program concerns as well as energy/sustainability opportunities).

3.1.7 Customized Approach

Our approach to condition assessments first starts with an understanding of your Asset Management Story. Our team wants to understand the Agency's goals and objectives as it relates to this project and how this project supports the Agency in achieving them. This allows us to customize the deliverable to align with your needs rather than simply providing a "cookie cutter" condition assessment report. It also allows Roth IAMS to understand the format of the end deliverable to best suit your objectives.

3.1.8 Asset Management Software Expertise

Our team has been involved in using and supporting the development of multiple Capital Asset Management Software (CAMS) solutions for over 20 years. Our professional assessors are experienced in using a variety of on-site field data collection tools (on tablets or phones). As such, we are confident that upon review of the referenced training documents that our team will be efficiently be able to use BUILDER for the Agency FCAs.

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3.2 OUR CLIENTS

Roth IAMS team members have conducted FCAs on some of the largest portfolios of buildings across North America including those listed in Table 2 below:

Table 2 – List of Clients	
State of Maine	City of Victoria
City of Corona (CA)	All 24 Ontario Colleges
Sno Isle Libraries	All 21 Ontario Universities
University of Southern Mississippi	City of Bowie, MD*
University of Florida	City of Columbia, Missouri*
University of Minnesota	University of Alabama*
Ontario Ministry of Infrastructure	Texas A&M University, College Station*
Alberta Infrastructure	Baylor University*
Government of Manitoba	Clark County School District, NV*
Government of Yukon	Maryland School For The Blind*
Government of Northwest Territories	Evergreen Schools*
Government of Nunavut	University of Saskatchewan
City of Calgary	University of Regina
City of Edmonton	Capilano University
City of Vancouver	And many more.

(* - represents projects that were completed by our US Staff prior to joining Roth IAMS)

3.3 REFERENCES

Roth IAMS is pleased to provide the Agency with details of several recently completed municipal FCA-related projects, similar in scope and scale to the current RFP. The project information includes client reference names and contact information.

Roth IAMS Relevant FCA Project Experience - Project No. 1	
Project Name	Facility Condition Assessment Program
Client Name	University of Southern Mississippi Coastal Operations
Client Contact	<p>Name: Lucas A. Applewhite, PMP, CEFP; Interim Director of Facilities Planning and Management, Coastal Operations</p> <p>Address: 703 East Beach Drive, Ocean Springs, MS 39564</p> <p>Phone: 228.818.8019</p> <p>Email: Lucas.Applewhite@usm.edu</p>
Project Dates	Winter 2022 to Present
Project Budget	\$25,000 (2022), \$151,000 (2023)
CAM Software Utilized	SLAM CAP
Project Description (Scope, Objectives, Constraints, Deliverables)	
Like many higher education institutions across the United States, the Coastal Operations team and the University of Southern Mississippi (USM Coastal) has struggled to build and maintain the momentum required to define and address its	

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growing Deferred Capital Renewal and Maintenance (DCRM) Backlog. USM Coastal partnered with Roth IAMS to provide a pilot-level Facility Condition Assessment (FCA) project, which included the assessment of 5 of their just over 50 buildings included in its portfolio. The purpose of the pilot was to develop a standardized approach and dataset that USM Coastal would use to communicate its DCRM, as well as develop more data-informed multiyear capital plans going forward.

Using SLAM CAP as the data collection and reporting tool, Roth IAMS staff provided USM Coastal with a full inventory of the elements present within the pilot buildings, as well as a forecast of future renewal needs for each element. In collaboration with USM Coastal, Roth IAMS customized the Unifomat II Level 4 data structure used to identify the elements. Unit costs were adjusted based on published regional factors for the USM's region.

Traditional FCA reports were prepared for each building, including Opinion of Probable Cost Tables. In addition, USM Coastal was also provided with access to the SLAM CAP software during the period in which decisions regarding full-scale, portfolio-wide roll-out is being decided. Configuration of the SLAM CAP database was completed as well as initial user training.

USM Coastal is in the process of integrating the FCA data and SLAM CAP into its internal deliberations regarding DCRM and Capital Planning, including engaging with senior leaders within the University to better understand the current needs of the pilot buildings, the planning capabilities and functionality provided by SLAM CAP, as well as considering next steps for a portfolio-wide implementation.

Based on the satisfaction with the pilot, Roth IAMS is currently assessing the remaining 54 buildings, across four campuses/locations included in the USM Coastal portfolio.

Roth IAMS Relevant FCA Project Experience - Project No. 2	
Project Name	Facility Condition Assessments and Capital Asset Management Software
Client Name	University of Minnesota
Client Contact	Name: Andrew Chan, Portfolio Management Program Manager Address: 1049 University Drive, Duluth, MN 55812 Phone: (612) 625-4931 Email: chan0391@umn.edu
Project Dates	Fall 2022 to Present (5-Year Contract)
Project Budget	Approximately \$650,000 annually
CAM Software Utilized	SLAM CAP

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Project Description (Scope, Objectives, Constraints, Deliverables)

The University of Minnesota (UMN) had previously completed FCAs and implemented a Capital Asset Management System (CAMS) for their multiple campuses throughout the state. In 2022, the decision was made to go back to the market to seek a partner to collaborate with over a 5-year period.

Roth IAMS was selected, including the implementation of the SLAM CAP CAMS to support UMN in evolving its facility and infrastructure asset management program. The scope of work for the condition assessments was expanded to also include the Central Utility Buildings as well as the underground site infrastructure.

Roth IAMS collaborated to configure UMN’s SLAM CAP portal to allow for migration of existing FCA data from its former CAMS software. Pilot building data was migrated originally to allow our team to map the migration process. Following the pilot all of the UMN buildings were migrated into SLAM to allow UMN to begin leveraging SLAM’s data visualization and capital planning functionality for all buildings, even though the FCAs will occur over a multiyear period.

Roth IAMS completed a Pilot-Scale program on the Duluth Campus in late 2022 to allow UMN and our team to test our assumptions and validate the data migration from their previous CAMS.

Roth IAMS is ramping up our FCA site work and is expanding to four assessment teams for the summer 2023 assessment season. Additionally, as underground infrastructure was not included in the FCAs previously, we are focused on completing all of the infrastructure assessments in 2023.

With the FCA program hitting its stride, Roth IAMS and UMN will begin to look at integrating the FCA data with UMN’s Computerized Maintenance Management System later in 2023 as well.

Roth IAMS Relevant FCA Project Experience – Project No. 3

Project Name	Province-Wide Facility Condition Assessments – All 24 Ontario Colleges
Client Name	Ontario Colleges, facilitated by the OCFMA Steering Committee
Client Contact	Name: Spencer Wood, Chair, OCFMA Steering Committee Address: 205 Humber College Blvd, Toronto ON Phone: 416-675-6622 ext. 5242 Email: spencer.wood@humber.ca
Project Dates	June 2017 to Present
Project Location	Province of Ontario, Canada

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Portfolio Size	Approximately 35 million sq.ft. (Being Completed over 5-Years) – Initial round completed in 2022, Reassessments started in 2023
Project Budget	Approximately \$2 Million Annually
CAM Software Utilized	SLAM CAP
Project Description (Scope, Objectives, Constraints, Deliverables)	
<p>Please note that this work is contracted to Roth IAMS through FCAPX a Division of Roth IAMS, which was the brand under which FCA work was contracted prior to 2019.</p> <p>Ontario Colleges had FCAs completed on all College buildings (approximately 700) between 2011 and 2014. There were significant concerns with the quality and consistency of the data. As such, the Ontario College Facility Management Association (OCFMA) coordinated the selection of a proponent to update the FCA data through the Ontario Educational Collaborative Marketplace (OECM). Roth IAMS was the highest ranked proponent through the process and has been working with the Ontario Colleges since June 2017.</p> <p>Roth IAMS (Project brand FCAPX due to the date of the OECM contract signing) has collaborated to improve the quality and consistency of both the pre-existing data, as well as the newly collected FCA information, gathered by our team. This has included the development of an enhanced Uniformat II structure, the implementation of consistent Unit Costs and Expected Useful Life information. Additionally, we have developed protocols that will allow the Colleges to better leverage their data for longer-term planning.</p> <p>Roth IAMS is working on the first year of the second 5-year cycle wherein all Ontario College buildings will be reassessed following the initial Roth IAMS FCA. All updated FCA data is being imported by Roth IAMS into the College SLAM CAP database for on-going asset management by the Colleges. Through the OCFMA Steering Committee, Roth IAMS has received positive feedback on the updated dataset as it relates to quality and consistency.</p> <p>In addition to FCAs, Roth IAMS is also completing Infrastructure Condition Assessments (ICAs) for each College as this data was included in the previous assessment (Pre-Roth IAMS) program.</p> <p>In addition to FCAs, Roth IAMS is also providing data management and clean-up services to most Colleges as well as Accessibility and Energy Assessments and Equipment Inventory (to support the development of Preventative Maintenance Programs) for select Colleges.</p>	

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3.4 PROJECT TEAM

Roth IAMS' team includes full-time staff (no independent contractors) with the expertise in all disciplines required to meet the Agency's scope of work including Architects, Civil/Structural, Mechanical and Electrical Engineers. To the Agency, this means that all the resources required to complete the project are within our organization so the risk of logistical issues with multi-company teams is eliminated. Also, by having our staff as full-time employees, it means that Roth IAMS has the ability to train and invest in the professional development of our staff, resulting in the collection of a more consistent and defensible dataset to support the Agency's Facility Condition Assessments and Inspections.

Our project organization chart is provided in **Appendix 2**.

3.4.1 Principal-in-Charge – William (Bill) Roth, P.Geo.

Bill will be the Principal-in-Charge for our team and will work closely with the Agency's Project Manager to deliver a successful project.

Bill has 27 years of experience collaborating with clients from across various real estate sectors assisting them in designing, executing, and managing FCA projects for large geographically diverse portfolios across North America. Bill has personally overseen the completion of over **20,000 FCAs** across all types of facilities including government buildings, office, retail, industrial, healthcare, education, aviation and recreational. Bill's personal U.S. experience includes FCAs for King County (Seattle, WA), Hillcrest Healthcare, Alaska Department of Health and Social Services, Virginia, and Louisiana Departments of Transportation, and Core Civic (Formerly CCA). Bill is familiar with many of the commercially available Capital Asset Management Systems (CAMS) as well as Computerized Maintenance Management Systems (CMMS) and has supported the developers of various CAMS/CMMS by providing insight to improve upon the software functionality and reporting capabilities.

3.4.2 Project Manager – Michael Novich, RA, AIA

Michael is a licensed and registered architect in three (3) US jurisdictions with over 30 years of experience in building and site design, construction document generation, new construction monitoring and inspection, cost estimating, and architectural project management. Michael has followed that with 8 years of building and facility condition assessments and building systems evaluation in the commercial mortgage finance and acquisition/disposition arenas as Assessor, Senior Project Manager and National Client Manager. As Project Manager he has trained and mentored staff working with energy, ADA and Fair Housing, project due diligence, construction document take-off and review, site, building envelope and structural assessment, scheduling and the methods and concepts of effective site facility data acquisition, report writing and review.

Michael has completed over 900 facility assessments throughout the United States. He has experience as team leader for numerous multidisciplinary assessment projects including University, Private School, Institutional and commercial clients and in managing

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the coordination, scheduling and execution of assessments with effective client/service provider communication.

3.4.3 Discipline Leaders

Our Project Manager will be supported by a team of Discipline Leaders (DLs) that each bring a unique area of expertise to the project. The DLs will be involved throughout the project to ensure the issues associated with their disciplines are integrated with the Agency's business processes and objectives. Our proposed DLs are as follows:

3.4.3.1 Architectural and Structural – Kyle Christiansen, RA

Kyle has more than 35 years of experience in renovation, adaptive-reuse, historic rehab, facilities condition assessments, building systems evaluations, and property inspections. He has experience with many property types including office, retail, hospitality, healthcare, multifamily, educational, manufacturing, marina, amusement, and military. He has led FCA consulting teams for university campuses, school systems, municipalities, park and recreation departments, commercial healthcare services, and transportation facilities. He has historic preservation experience including project management experience for the renovation of Betsy Ross's home and Valley forge homes in PA. He is a published author and speaker on the topic of facilities asset management and has trained and managed hundreds of property assessors in his industry leading roles. He manages and directs Facility Integrated Asset Management Services activities for Roth IAM's U.S. operations.

3.4.3.2 Mechanical and Electrical – Don P. Gerardi Jr, B.S., M.E. A.S./Struct., ABA

Don is a Technical Reviewer at Roth IAMS LLC. Don is a licensed engineer and has more than 24 years of experience in the field of facilities systems engineering with Assessment experience in thirty-eight states and 5 countries. His facilities work includes project management for medical, multifamily, healthcare, assisted living, office, residential, universities, K-12, government facilities both in the United States and abroad. He has performed over one thousand (1,000) Property Condition Assessments (PCA) and Physical Needs Assessments (PNA) for a diverse array of buildings and properties throughout the United States and abroad. He is knowledgeable with local and federal building codes, ADA requirements, and Fair Housing guidelines.

Don has experience in the equity-scope due diligence arena primarily in the engineering field and specializes in mechanical systems with mechanical engineering discipline and the construction industry. Don is knowledgeable with ASTM Standard Guide for Property Condition Assessments, accessibility standards including FHAA and ADA, and ASTM Standard Guide for Seismic Risk Assessment of Buildings.

3.4.4 Site Assessors

Our team believes the site review is a critical component to the execution of a condition assessment and as such we believe this should be undertaken by experienced, qualified staff. It is important to have this experience to determine where a building component is within its expected useful life as this is dependent on how often the component is used,

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how well it is maintained and typical signs of wear and tear, and not simply based on the components age.

The composition of our assessment teams will be based upon the age, size and complexity of the specific assets included in our scope of work. Roth IAMS is pleased to provide the following key site assessment staff that will support us should we be selected as the successful proponent.

3.4.4.1 Abdel Hamed Hassan, B.Sc.

Abdel, a native of Houston, has 25 years of experience in commercial buildings construction, with emphasis on Mechanical, Electrical and Plumbing (MEP) systems pertaining to building systems evaluation, and renovation, facility condition assessment. Abdel has an extensive experience in MEP systems assessments in Texas, S.A., and GCC. He has experience with many property types including K-12, community college, university, courthouse, federal prison, ice arenas, recreation centers, hospital, and multifamily.

3.4.4.2 Joel Mooney, CFM, CPI, MS Ed.

Joel has the knowledge and experience to complete generalist-level assessments of smaller/simpler assets wherein he will be responsible for assessing all elements within a building. Since 2014, he has completed Life Safety assessments for Hospitals, and assisted with three successful Joint Commission Surveys for Healthcare Facility Departments.

Joel has senior-level Facilities Management experience with clients in Healthcare, K-12 & Higher Ed. Institutions, Banking and Commercial Real Estate Investment groups, and twenty years' experience in Commercial/Retail/Office Construction management for clients across the Southeast U.S.

Joel is proficient in the use of Capital Asset Management Software (CAMS) used in the asset data collection and reporting such as SLAM. In addition to the above, as a Senior Project Manager, Joel has also managed completion over 100 Construction projects for clients in South Florida.

3.4.4.3 Kari Morgan

Kari is an architectural/structural assessor with the knowledge and experience to assess the building foundation, structure, exterior walls, windows, doors, roofs, interior construction and interior finishes. She also has the skills to assess the site infrastructure i.e. roads, parking lots, retaining walls, tunnels, etc.

Kari also has the knowledge and experience to complete generalist-level assessments of smaller/simpler assets wherein she will be responsible for assessing all elements within a building. Since 2022, Kari has completed assessments for a wide variety of assets for Financial, Industrial, and Commercial clients across the United States.

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Kari excels in customer service and communication skills and is very detail oriented. She is fluent in English and has a working knowledge of Italian.

Kari is proficient in the use of Capital Asset Management Software (CAMS) used in the asset data collection and reporting such as SLAM and Quire.

3.4.5 Potential Local Project Team Growth

Throughout our corporate history Roth IAMS has achieved its North American expansion by securing multiyear FCA contracts with clients, and then hiring local staff to provide services to those clients. Should the Agency wish to complete this FCA project over multiple years, Roth IAMS will look to hire local West Virginia-based FCA professionals to join our team, and support the local economy.

3.4.6 Assessment Team Composition

Roth IAMS builds its assessment teams based on the size and complexity of the subject buildings to be assessed. Our team composition generally includes:

- Three Professional Assessors (One Architectural/Structural (A/S), One Mechanical (M) and One Electrical (E)) for large and/or complex buildings;
- Two Professional Assessors (One A/S and One M/E) for most buildings; and
- A Single Professional Generalist Assessor that has knowledge of all building disciplines for the smallest and/or simplest buildings.

In general, Roth IAMS assessment teams will most often consist of two professional assessors. During the proposed Kick-Off meeting, Roth IAMS will review the proposed assessment team structure with the Agency.

4 GOALS & OBJECTIVES – ANTICIPATED CONCEPTS AND METHOD OF APPROACH

Roth IAMS is pleased to provide the Agency with the following scope of work designed to meet, and in some cases exceed the requirements of the RFP.

Having completed over 24,000 FCAs, our team has developed a series of project management tools and procedures to support our team and clients in the successful completion of FCA projects. The following sections provide details of these recommended processes.

4.1 PROJECT MANAGEMENT

For more information on our Project Management approach, please see Section 5 below.

4.2 FACILITY CONDITION ASSESSMENTS

The FCA will generally be performed in accordance with the requirements of the ASTM Standard E2018-15: Standard Guide for Property Condition Assessments.

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Uniformat II is the de facto industry standard for building system nomenclature and includes the following detailed asset breakdown:

- A - Substructure;
- B – Building Shell;
- C - Interiors Construction;
- D – Mechanical & Electrical Services;
- G - Building Sitework.

Roth IAMS is a champion of the Uniformat II (ASTM Standard E1557 – Standard Classification for Building Elements and Related Sitework). Over 85% of the 24,000 FCAs that our project team has personally been involved in were completed using the Uniformat II nomenclature system.

4.2.1 Documentation Request and Review

Roth IAMS will provide a background document request to the Agency outlining the list of information, if available that will support the project.

If hard copies (or hard drive) of the documentation are available, our team will collect them during the Kick-Off Meeting. Alternatively, if digital versions of the information are available, we can create a project-specific secure site to allow for the efficient sharing and distribution of the relevant project information.

Upon receipt of the available relevant information from the Agency, our Project Manager will distribute the documents to the assessors for each specific site. The assessors review the information prior to visiting each site to provide a familiarity with the buildings.

4.2.2 On-Site Activities

4.2.2.1 Knowledgeable Staff Interviews

It is critical to the successful completion of this project that our assessors can interview Agency staff members that are familiar with the operations and maintenance of each facility. This helps to ensure the most accurate data is collected on the building systems, their operations and history. This interaction allows our assessors to integrate the institutional knowledge that resides in the “heads” of critical site and building staff, providing better recommendations for proposed renewal events. Any questions arising during the Documentation Review will also be addressed with the appropriate contact as well.

The format and timing for the interviews will depend upon how the Agency’s facility team is structured and will be confirmed during the project Kick-Off Meeting. Roth IAMS will work collaboratively with the Agency to determine the format that is the most efficient for staff and most effective for supporting our collaborative approach. Ideally if we are able to set-up a meeting where our team can sit down with staff and go through the buildings in advance of the site visit we have found this method to work best. It is also beneficial to

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ask questions following the site visit based on items observed during the assessment that may have not been discussed in the interview.

4.2.2.2 Site Walk-Through

Our site assessors, ideally accompanied by an escort from the Agency's team, will complete a walk-through of each building and site consisting of our assessors visually observing: the roof, the exterior of the building(s), common areas, mechanical and electrical rooms/vaults, washrooms, and a sampling of the operational spaces within each building to check the performance of the building systems and confirm representative condition.

Our team will work with our escorts to limit the disruption to the on-going site operations. All site visits will be scheduled on weekdays between 8:00 AM and 4:30 PM, however if any of the buildings are open outside of these hours, some of the public areas may be easier to assess outside of these hours, when there are less occupants around.

4.2.3 Reporting

As outlined in the CEOI, Roth IAMS will utilize the BUILDER software to collect the on-site data and provide the FCA reports for each in-scope building.

Copies of the draft reports will be provided for Agency review and comment. On completion of the integration of the relevant Agency comments, a final report for each building will be provided.

4.2.3.1 Digital Photographs

Digital photographs of each building/asset along with specific element photographs will be provided in the FCAs to support the observed conditions and recommendations. For each recommendation that is more accurately described with visual representation, a digital photograph will be included to help identify and locate the element.

4.2.3.2 Condition Rating

Each element will be classified based on the condition observed and the estimated remaining useful life. Roth IAMS assumes that BUILDER comes with a configured Condition Rating, which we will apply. However, if a condition rating does not exist, we will work collaboratively with the Agency to develop one that will be used by our team of professional assessors.

4.2.3.3 Recommendation Type

Each recommendation will be assigned one of the following types that provide details on the type of recommendation that is being made:

- **Engineering Study** – a proposed engineering study (e.g. roof cut tests, infrared scanning) to more accurately diagnose an issue that cannot be determined based on visual assessment only.

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- **Major Repair** – repair or replacement of subcomponent (e.g. motors) of a component for the express purpose of extending the useful life of the component/system;
- **Lifecycle Replacement** – replacement of a component/system based on reaching its expected useful life (typically beyond the first 10-years of the evaluation period). This may also include system refreshment recommendations such as, but not limited to seal coating of asphalt; painting, pointing, or sealant replacement for exterior finishes; painting of interior finishes; or replacement of elevator cab finishes.

4.2.3.4 Costing Recommendations

Roth IAMS does not recommend relying solely on standard cost guides such as RS Means, and Marshall and Swift to provide the budget costs for the repair and renewal events provided in our FCAs. We will employ our own internal estimated unit cost document, using these standard cost guides, regional factors and our own experience, as well as client-specific pricing as available (records of recent repairs, replacements, upgrades, etc.). We will review our proposed unit cost schedule and associated regional factors during the proposed Kick-Off Meeting and integrate any Agency-specific costs. Our team's assessors would then employ the unit cost schedule when preparing the cost estimates for each recommended repair/replacement in the FCA reports.

5 PROPOSED PROJECT MANAGEMENT, QUALITY AND COST CONTROL PLANS

5.1 PROJECT MANAGEMENT

5.1.1 Project Kick-Off

We recommend that an in-person project kick-off meeting (virtual) be scheduled with key stakeholders from the Agency as well as our Project Manager at the outset of the project. The purpose of this meeting will be for all the stakeholders to meet to meet via an online platform, to outline the Agency's detailed objectives for the project; and ensure an understanding of the steps that will be part of project execution.

5.1.2 Collaboration

One of the founding principles of Roth IAMS is Collaboration. To accurately capture the condition of the Agency's assets, we engage with the knowledgeable staff from the client's organization during the process, beyond providing someone to open locked doors and escort them through the facility. Although this does take more time for both our clients and our staff, in our experience, it results in a more useful end-product for the client.

One of the greatest issues associated with facility and asset management today is that many organizations have staff that house tremendous knowledge of their buildings within

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their heads. As those experienced staff prepare to retire, the organizations face a tremendous risk if that unique knowledge walks out the door with them leaving.

Throughout our project methodology we focus on collaborating with our clients to provide as much opportunity as possible to extract that institutional knowledge from the minds of our client's staff. This collaboration informs and supports the FCA/clients, which in turn provide a more solid foundation for an on-going asset management program.

We exhibit the collaborative approach through:

- Project Kick-Off Meeting;
- Completion of a pilot-level program followed by a client review and debrief;
- Interviews with knowledgeable building and facility staff;
- Engaging our site escorts throughout the site visit; and
- Integration of client-provided comments and feedback throughout the project.

5.1.3 Contact Information

Roth IAMS will prepare a Project Team Contact sheet for distribution to Agency representatives as well as the Site Assessment team which will include cell phone numbers and email addresses.

5.1.4 File Sharing

Roth IAMS will establish a secure web-based platform (OneDrive) for the sharing of documentation from the Agency as well as for transferring Draft and Final Reports. A file structure will be established at the outset of the project that will ensure ease of file sharing between our teams.

5.1.5 Regular Project Update Calls

Roth IAMS recommends at minimum monthly project update calls, which in general will be conducted using Teams, Zoom or other web conferencing software to create a virtual collaborative workspace.

5.1.6 Wrap-Up/Report Out Meeting

Following the completion and acceptance of the final reports, Roth IAMS will schedule a meeting with key Agency stakeholders to review the project, discuss any items that should be considered during future related work and share lessons learned.

5.2 COST CONTROL

One of the main roles of a successful Project Manager is controlling the costs of a project. Roth IAMS employs many proactive cost control measure which allow us to efficiently provide consistent and defensible facility data to our clients including:

- Development of standard unit costs and expected useful life data by Uniformat II Level 4 code that is consistently applied across multiple assessment teams;
- Development of standard language that is used to provide consistent narratives within the BUILDER Software;

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- Recommended pilot at the outset of the project to test assumptions of all stakeholders and get clarity on scope of work and deliverable expectations, reducing costly downstream revisions to multiple reports;
- Building our schedule based on Travel Loops that minimize the mobilization and travel costs associated with completing the on-site assessment; and
- Monitoring and reporting of weekly KPIs (including quality, communication, instructions and milestones).

5.3 QUALITY CONTROL METHODOLOGY

Roth IAMS employs a proven approach to QA/QC that has been used successfully by our team members on numerous portfolios similar to the Agency's and is outlined in the following sections.

5.3.1 Preparation of an Assessor Handbook

We will develop an assessor handbook to provide guidance on the specific requirements of the Agency for this project to be used by the assessment team. We do this to ensure consistency. The assessor manual will include Agency's Project Management contact information, health and safety protocols during the site visit, and the unit cost schedule.

Where the project portfolio includes different facilities (administration, recreation, utility, service, etc.) and the project assessment team involves more than one assessor, Roth IAMS, to ensure consistency across the portfolio, prepares an 'Assessor Handbook'.

The assessor handbook:

- Discusses in detail the approach to data capture and upload to a capital asset management software;
- Defines to help assessors' opinions on the asset element condition structure (good, fair, poor), renewal needs (replace, repair, engineering study), and priorities (life safety, structural integrity, etc.);
- Explains, to provide dependable renewal costs, asset element the unit costs, and the application of difficulty factors, regional factors and soft costs; and
- Includes, for coherence between assets, Uniformat II classification asset element hierarchy, which is established and finalized in collaboration with the Agency.

The assessor handbook, which is drafted at the outset of the project, is refined to include the Agency's comments.

The assessor manual will also include the Agency's Project Management contact information, nuances with site access and health and safety protocols required during the site visits.

5.3.2 Initial Assessor Training

Each assessor will attend a training meeting lead by the Project Manager and DLs. Training will occur after the completion of the proposed Pilot-Level Program, and prior to

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the full project roll-out. The purpose of the training will be to present the scope of work and to ensure an understanding of the specific information required for completion.

In addition, Roth IAMS will provide details of overall project requirements for protocols during the completion of the site visits and will review the assessor handbook that will be created for this project.

5.3.3 Desktop QA/QC by Design Discipline Leaders

Each FCA report will be submitted by the assessor to the DLs assigned to the project. The DLs collectively have over 40 years of experience conducting, managing and reviewing FCAs.

Upon completion of the desktop QA/QC process, a digital copy of the draft report will be submitted to the Agency. Comments received from the Agency will be reviewed by our DLs and the appropriate site assessor(s) and approved revisions will be made.

Any major changes to the overall standard wording or assessment protocols that are requested by the Agency through this process will be distributed to all assessment teams.

5.3.4 Pilot-Level Program

Roth IAMS recommends that a pilot-level program be undertaken at the outset of any portfolio project. The pilot program consists of the complete assessment and reporting on a sample of buildings from the subject portfolio. Undertaking the full scope of work on a representative sample of buildings will allow the Agency to experience the proposed project steps and to provide feedback on the draft reports early in the process. Any changes resulting from the pilot are then implemented prior to the full-scale project roll-out.

5.4 PROJECT CHALLENGES

There are many challenges that can occur when conducting FCAs. Roth IAMS believes that there are two key strategies that lead to effective problem resolution on any project:

- Proactive project and process management to avoid major problems from occurring; and
- Timely and effective response to issues that arise when identified by our staff or our clients.

We will provide details of how we have employed both types of strategies on many of our over 24,000 FCAs completed by our project team. These examples represent some of the more common issues that we have dealt with over the past 30 years.

Overall, our philosophy on issue resolution involves timely response and over-communication with internal and external stakeholders to allow for an effective resolution of the concern.

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5.4.1 Proactive Management

Roth IAMS is pleased to provide the Agency with the following common issues that we have seen on FCA projects, along with our proactive strategy that we employ to attempt to avoid the problem from occurring.

5.4.1.1 Data Quality Concerns

Within the FCA industry it is not uncommon for clients to be concerned with the quality of data that they receive from their consultants. To maximize the consistency and defensibility of our FCA work, we have developed a series of processes that engage our clients throughout the project to provide a level of comfort with data quality early and often including:

- Completion of pre-site assessment interviews with staff that are familiar with the operations and maintenance of the building systems located in a specific building or across an entire campus or portfolio;
- Actively engagement of our site escorts during the site walkthrough to gain further knowledge of the buildings and systems;
- Submission of draft reports for each building to the client to allow for review and comment prior to finalization; and
- Where major revisions are recommended by a client (a rarity), we will issue a second draft report to allow our clients to review how we implemented their recommended changes to the reports.

5.4.1.2 Risk of Data Loss

Roth IAMS staff are required to sync their tablets and phones (where used for field data collection) at least once a day following on-site assessments. If possible, we recommend that where WiFi is available that they consider doing so during their lunch break as well. In this way, in the event of hardware failure, there is at most a single day's worth of data that will be lost.

Additionally, all of Roth IAMS' IT infrastructure is built off of Microsoft SharePoint. All laptops and tables continuously sync data to our cloud server. Additionally, we have a third-party provider that backs up our cloud drive three times a day. In the event of major failure of our SharePoint (unlikely), we have back-ups that occur in the morning, afternoon, and evening, minimizing potential data loss.

5.4.1.3 On-Site Security and Building Access

It is critical to the success of any FCA project that our assessors have access to the areas of the buildings that they need to observe as part of the scope of work. Issues related to security and site access can create problems if not handled appropriately. Roth IAMS having assessed thousands of sensitive and highly secure sites has developed the following standard protocols to limit the occurrence of security-related issues and/or our staff being barred from accessing buildings or areas of buildings:

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- On-site staff always wear a badge with their photograph on it identifying them as a Roth IAMS team member. In the event that a client has a preferred and recognized contractor or visitors badge we will defer to the badge that is easily recognized by on-site client personnel;
- We carry a letter prepared on our client letterhead outlining the purpose of the project and confirming that our client has given us permission to be on-site and access the buildings included in our scope of work. We typically provide a template letter to our clients that they revise to meet their specific needs and format;
- Wherever possible we request a site escort to conduct our site walkthroughs. Having someone that on-site staff/occupants are familiar with limits the potential for concerns being raised while our teams are on-site. Additionally, it gives us the opportunity to engage the staff as it relates to her/his knowledge of the buildings and systems;
- No photographs are taken of buildings or building systems that include people in them. This avoids any occupants having concerns with our staff taking photos, which is a critical aspect of our reporting; and
- When staff access washrooms or change rooms within buildings they are always accompanied by a member of our client's staff. In this way our staff are not in sensitive areas alone.

5.4.1.4 Staff Illness and Turn-Over

Issues will arise where staff illness or turn-over can disrupt an FCA project. To minimize the disruption to a project resulting for a staff member not being able to attend a scheduled site visit, Roth IAMS trains additional assessors beyond those that will be primarily assigned to our projects as part of the initial assessor training. In this way, if an assessor falls ill, we can replace him/her in short order to minimize the disruption to our project schedule. The only time a major delay occurs is when we are dealing with remote site locations where significant mobilization time is required.

With regards to staff turn-over, again by having our back-up assessors ready to join a project team we can respond when a team member decides to move-on. Typically, if an assessor resigns, we remove them from active site assessment work to allow them to complete any outstanding reports for buildings they have previously assessed.

5.4.2 Reactive Responses

No matter how proactive a project team can be, issues will invariably arise that require a timely and efficient response. Roth IAMS is pleased to provide the Agency with details on our systems and processes that we have in-place as part of our project work plan to address any issues/problems that do arise.

5.4.2.1 On-Site Issues that Disrupt our Site Assessment

In the event that an issue arises while our assessment team is on-site, such as a lock-down or security issue that requires our site assessors to cease their work, the Agency will have the cell phone number of all on-site assessment staff. The Assessment Team

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Leader (ATL) would be the first person that should be called, followed by other members of our project team. In most cases we would hope that a member of the client's staff is also accompanying our team, so they could be reached through normal on-site communication channels as well.

Our ATL would contact our Project Manager (PM) to inform him/her of the issue and discuss options for a response. Depending on the nature of the issue and/or the expected timeline for reconciliation the PM and the ATL, in consultation with the site representative would decide on the proper course of action, which may include rescheduling the site visit, mobilizing to another building or waiting out the issue (if the expected duration is limited).

5.4.2.2 Concerns with Data Quality or Accuracy

As outlined above, Roth IAMS has developed extensive protocols and procedures to maximize the consistency and defensibility of our data collected during FCAs. However, we also have processes for responding to specific client concerns.

In general, the issue or concern would be communicated to our PM, who will be available throughout the duration of the project during normal business hours. Our PM will work with the Agency representative to understand fully the concerns with the data being provided. Our PM will take the concerns and review them with our Discipline Leaders (DLs) that completed the Desktop QA/QC review of the specific building or specific assessor associated with the concern.

Within 48 hours our PM will provide a response to the concern identifying the findings of our analysis and outlining the measures will be taken to address the concern. Solutions can range from reissuing an updated draft report for client feedback to conducting a second on-site assessment of a specific building, depending on the severity of the issue.

6 VALUE-ADDED SERVICES

In addition to our FCA expertise, Roth IAMS team can also provide the following services to the Agency to support their facility asset management program. Should the Agency wish to undertake any of these services, additional information would need to be shared to allow us to integrate the costing into an FCA project.

6.1.1 Equipment Inventory and Tagging

FCAs and capital planning are a key element of any AM Program. However, Roth IAMS also feels that a robust Preventative Maintenance Program, based on a detailed equipment inventory also plays a critical role. In the event that the Agency does not have a robust equipment-level inventory, Roth IAMS can collect the required data concurrent with the on-site assessment included with the FCAs. The incremental effort required to do so is considerably less than doing so on its own.

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The Equipment Inventory & Tagging will be undertaken concurrent with the above tasks. With the objective of using the data to track, and manage system preventive maintenance and system renewal, the approach/methodology for the inventory and tagging will be as follows:

- Work with the Agency to understand the objective, and select the systems desired for this task;
- Record, where available and/or applicable, for the selected system location (rooftop, mechanical room, etc.) and the selected system nameplate information: such as make, model number, serial number, filter size, belt size, horse power, voltage, current; number of phases, areas served etc.;
- Attach to the selected system a temporary system tag with a temporary system number, or if at the time of the assessment, the Agency is able to confirm its policy/standard on tagging (either bar codes or QR codes), a permanent system tag; and
- Prepare a spreadsheet, which will include the temporary/permanent system tag, the system location and the applicable nameplate information.
- Using dataset information gathered through inventory and tagging, Roth IAMS can apply Preventative Maintenance Tasks to selected asset groups, such as HVAC, Electrical and Mechanical Equipment. These can be used to implement or enhance existing PMP.

6.1.2 Accessibility Assessments

Roth IAMS also has expertise in ADA, accessibility assessment consulting services. Our assessment services include a Tier I – checklist/visual audit as set forth by ASTM E2018-15 or a Tier II – detailed measured audit that involves physical measurements of distances, heights, slopes, and pull strength (for doors). Both types of assessments are accepted as industry standards, depending upon the needs and wishes of the client. Tier I ADA assessments is the industry standard for transactional financing such as refinance or pre-purchase. Tier II is typically used for new construction, pre-purchase, or capital planning. ADA compliance is a specialty service for Roth IAMS and we maintain staff and a reporting protocol to help our clients navigate through the legal matrix and to help meet the needs of building users who may be struggling with various of disabilities.

6.1.3 Energy Assessments

Roth IAMS also has expertise in energy assessments and energy management consulting services. Many government agencies have a large focus on greenhouse gas (GHG) reduction and climate change mitigation, in which buildings play a significant role through the energy used. Roth IAMS can provide energy assessments of the Agency facilities in conjunction with the FCAs. The walkthrough assessment, which could be undertaken concurrent with the FCAs, could be as simple collecting key energy conservation measures, for example are the interior lighting lamps incandescent or LED, is the window glazing single glass or insulated glass units, etc. Additionally, energy update opportunities can be integrated with FCA forecasting, as opposed to purely

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replace-in-kind scenarios. As an example, if lighting is approaching the end of its expected useful life then renewal should consider LED lighting. Alternatively, if energy assessment information exists it can be incorporated into the consolidated and be part of the multivariable prioritization decision matrix, if included in the work program.

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APPENDIX 1
MANDATORY FORMS



Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

**State of West Virginia
 Centralized Expression of Interest**

Proc Folder: 1220208			Reason for Modification:
Doc Description: EOI- BUILDER Site Assessments & Facility Inspections			
Proc Type: Central Purchase Order			
Date Issued	Solicitation Closes	Solicitation No	Version
2023-04-27	2023-05-11 13:30	CEOI 0603 ADJ2300000004	1

BID RECEIVING LOCATION

BID CLERK
 DEPARTMENT OF ADMINISTRATION
 PURCHASING DIVISION
 2019 WASHINGTON ST E
 CHARLESTON WV 25305
 US

VENDOR

Vendor Customer Code: N/A

Vendor Name : Roth IAMS LLC

Address :

Street : 600 Humberson Lane

City : Frederick

State : MD **Country :** USA **Zip :** 1073

Principal Contact : Kyle Christiansen

Vendor Contact Phone: 813-379-9345 **Extension:** 302

FOR INFORMATION CONTACT THE BUYER
 David H Pauline
 304-558-0067
 david.h.pauline@wv.gov



Vendor Signature X **FEIN#** 86-264698 **DATE** May 11, 2023

All offers subject to all terms and conditions contained in this solicitation

ADDITIONAL INFORMATION

The West Virginia Purchasing Division, for the agency, the West Virginia Army National Guard, Construction and Facilities Management Office, is soliciting Expressions of Interest from qualified firms to provide professional engineering services for the BUILDER Sustainment Management System Implementation, including Site Assessments & Facility Inspections, for facilities throughout WV, per the attached documentation.

INVOICE TO	SHIP TO
ADJUTANT GENERALS OFFICE 1707 COONSKIN DR CHARLESTON WV 25311 US	ADJUTANT GENERALS OFFICE 1707 COONSKIN DR CHARLESTON WV 25311 US

Line	Comm Ln Desc	Qty	Unit Issue
1	EOI- BUILDER Site Assessments & Facility Inspections		

Comm Code	Manufacturer	Specification	Model #
81101508			

Extended Description:

Provide professional engineering services for the BUILDER Sustainment Management System Implementation, including Site Assessments & Facility Inspections, for facilities throughout WV, per the attached documentation.

SCHEDULE OF EVENTS

<u>Line</u>	<u>Event</u>	<u>Event Date</u>
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	Document Phase	Document Description	Page
ADJ2300000004	Final	EOI- BUILDER Site Assessments & Facility Inspections	3

ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

Collaborative ❖ Passionate ❖ Consistently Curious

APPENDIX 2
PROJECT ORGANIZATIONAL CHART

Project Organizational Chart

West Virginia Army National Guard

