

# WORKING WITH ROOF CONSULTANTS



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**T**he Evans Companies have been working with roofing consultants since the early 1980s. This business relationship has been a very important part of the company's growth and success. This article is intended to give an overview of the contractor/consultant experience and a list of suggestions for each party.

During regional and national contractor association meetings and while competing on projects around the country, we share many discussions with professional roofing contractors who have strong opinions regarding their view of the contractor and consultant relationship. Generally, the contractors who have a positive view of this relationship (including ourselves) are attracted to consultants who carefully pre-qualify roofing contractors for their projects. These consultants value the experience a professional roofing contractor brings to the project.

Usually those contractors who disfavor the consultant relationship have difficulty with the loss of control of the project and the separation of their direct relationship with the owner. Many have had an unfavorable experience with inspections, disagreements about specifications, and difficulty following the chain of command.

The level of professionalism within the roof consultant community is as diversified as other professions such as legal or medical. Similarly, the professionalism displayed by roofing contractors and the competency of their field associates vary widely. We have been fortunate to work with some of the industry's best consultants and design firms because of our experience with complicated deck replacement projects over occupied spaces. The owners usually screen their designers very carefully, and the designer subsequently takes great interest in pre-qualifying the contractors. These projects are risky, and there is little room for error.

There have been instances where we have chosen not to bid projects issued by consultants, but not necessarily because of the

consultant's competency or technical capabilities. The issue is that other invited bidders were not pre-qualified. This often allows six to a dozen roofers of various levels of competency to submit bids. We choose to invest our time in responsible opportunities where all the players are pre-qualified and where the chance to be the successful bidder is more favorable with a level field of roofing contractors.

We would offer the following recommendations to each party.

## Recommendations to roofers

- Qualify roof consultants by asking other contractors about their experiences with them. Try to arrange a face-to-face meeting with the consultant before pre-qualifying to gain an understanding of his or her requirements and the compatibility of your corporate cultures.
- Work with or through the consultant beyond the requirements of the specification and design, toward the goal of providing a positive roofing experience for the owner.
- Working for a consultant is not about losing control but about meeting the requirements of the specification, design, and contract, and providing the building owner with a quality roof.
- Recognize and accept that the owner has hired the consultant to be his representative.
- Understand the chain of command and always work out issues and problems through the consultant. At the same time, remember that your contract is with the owner.
- There will be problems in any project. The mark of a professional is how well, promptly, and responsibly he resolves the problem for the customer. Deal with problems in a timely, professional, and responsible manner through the consultant. When you promise something, do it!
- Clarify any concerns before the bid, do not wait until the contract has been awarded.

- Read the documents carefully to understand your responsibilities and the cost of performing them. Fulfill the requirements of the design specification and contract documents.
  - Don't try to alter the design to be in accordance with the way you would do it. Perform all work in accordance with the design specifications and drawings unless you believe there is an error and then bring it to the attention of the consultant.
  - Agree verbally and document in writing any changes so all parties are in agreement.
  - Make sure that all members of the team have read and understand the consultant's specifications before the pre-construction meeting.
  - The content of the daily reports should be a true reflection of the work completed. Report on the positive. Do not mention minor negative issues that should be resolved on the roof with the consultant's representative.
2. Request a copy of the contractor's safety manual to ensure the company has a program in place.
  3. Ensure before the bid that the contractor can provide the required insurance and bonding coverages.
  4. When considering a contractor for the project, ask to have a complete OSHA 300A Log faxed that day. If the contractor is committed to safety and the required recordkeeping is done, then this information will be readily available. From that log, the "Recordable Incident Rate" and "Lost Work Day Incident Rate," which should be below the average of 5.25, can be computed.

## Recommendations to Consultants

- Show professional respect and common courtesy to other members of the team.
  - Remember the contractor is part of your team contracted to perform the work for the owner.
  - Make all requirements very clear and in writing.
  - Write a complete specification. Don't rely on the contractor to interpret information that should be included in the specification. For example, if you want a roofing system that complies with FM 1-90, then provide a design for a FM 1-90 roofing system.
  - Pre-qualify safety for contractors:
    1. Require a letter on the insurance carrier's letterhead with the contractor's experience modification rate (EMR) for the last three years and disqualify any contractor above a certain threshold. The baseline average is 1.0. Most private owners require a rating below 1.0 as a minimum requirement.
- Specify the installation of a perimeter guardrail system for fall protection instead of the OSHA minimum requirement of "safety monitoring."
  - Have thorough pre-bid and pre-job meetings to review the exact scope of work and to work out any problems beforehand.
  - Consider the recommendations of contractors if they are in the owner's best interests.
  - Do not direct the contractor's personnel on the job.
  - Recognize that all contractors operate differently, and some procedures that seem unnecessary may be done for a good reason. Allow the contractor to run his project the way he sees fit. Judge the contractor's results, not his means and methods.
  - Don't try to schedule the contractor's work and determine how many workers are required. Instead, provide a milestone in the bidding documents for the contractor to achieve an amount and hold him responsible if he doesn't achieve this requirement.
  - Process timely pay requests, change orders, etc.
  - Process all submittals in a timely manner.
  - Return all contractor's phone calls, e-mails, and communication in a timely manner. ■

## ABOUT THE AUTHORS

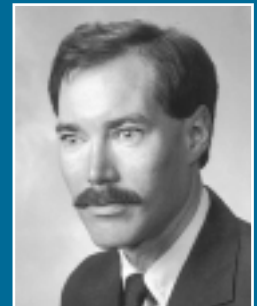


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