

# Roofing Scope

Project Address \_\_\_\_\_

## Project Information

Scope summary (1 to 2 sentence project description)

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Example: full roof replacement, partial repair, or new construction.

Project address

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Property type

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Occupancy status

- |  |                                 |
|--|---------------------------------|
| <input type="checkbox"/> Occupied        | <input type="checkbox"/> Vacant |
| <input type="checkbox"/> Tenant occupied | <input type="checkbox"/> Other  |

Access notes

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## 1.0 Project Overview

Type of project

- |   |   |
|---|---|
| <input type="checkbox"/> Full replacement | <input type="checkbox"/> Partial repair |
| <input type="checkbox"/> New construction | <input type="checkbox"/> Other          |

Roof size / approximate square footage

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Stories / roof height

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Existing roof type

- |   |   |
|---|---|
| <input type="checkbox"/> Asphalt shingles | <input type="checkbox"/> Metal                |
| <input type="checkbox"/> Tile             | <input type="checkbox"/> Low slope / membrane |
| <input type="checkbox"/> Other            |   |

## 2.0 Existing Roof Conditions

Number of existing layers

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Current roofing material

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Known issues

- |   |  |
|---|--|
| <input type="checkbox"/> Leaks                | <input type="checkbox"/> Damaged decking |
| <input type="checkbox"/> Soft spots           | <input type="checkbox"/> Flashing issues |
| <input type="checkbox"/> Ventilation concerns | <input type="checkbox"/> Storm damage    |

Known damage or concerns

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### 3.0 Tear-Off and Disposal

Scope

- |   |  |
|---|--|
| <input type="checkbox"/> Remove roofing to deck | <input type="checkbox"/> Overlay existing roof |
| <input type="checkbox"/> Partial tear-off only  |  |

Debris handling

- |  |   |
|--|---|
| <input type="checkbox"/> On-site dumpster    | <input type="checkbox"/> Off-site haul away |
| <input type="checkbox"/> Discuss with bidder |   |

Special disposal notes

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### 4.0 Decking

Decking work

- |  |  |
|--|--|
| <input type="checkbox"/> Replace damaged decking as needed | <input type="checkbox"/> Replace all decking |
| <input type="checkbox"/> No decking replacement expected   |  |

Pricing method

- |  |   |
|--|---|
| <input type="checkbox"/> Allowance           | <input type="checkbox"/> Unit price per sheet |
| <input type="checkbox"/> Include in base bid | <input type="checkbox"/> TBD                  |

Decking notes

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## 5.0 Underlayment and Ice / Water Protection

Underlayment type

- |   |  |
|---|--|
| <input type="checkbox"/> Synthetic underlayment | <input type="checkbox"/> Felt underlayment   |
| <input type="checkbox"/> Self-adhered membrane  | <input type="checkbox"/> Discuss with bidder |

Ice and water shield locations

- |  |                                  |
|--|----------------------------------|
| <input type="checkbox"/> Eaves           | <input type="checkbox"/> Valleys |
| <input type="checkbox"/> Penetrations    | <input type="checkbox"/> Rakes   |
| <input type="checkbox"/> Low-slope areas | <input type="checkbox"/> Other   |

Underlayment / waterproofing notes

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## 6.0 Flashing

Flashing scope

- |  |  |
|--|--|
| <input type="checkbox"/> Replace all flashing            | <input type="checkbox"/> Replace only damaged flashing |
| <input type="checkbox"/> New drip edge at all roof edges | <input type="checkbox"/> New flashing at penetrations  |

Flashing notes

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## 7.0 Ventilation

Ventilation items

- |  |                                      |
|--|--------------------------------------|
| <input type="checkbox"/> Ridge vents         | <input type="checkbox"/> Box vents   |
| <input type="checkbox"/> Soffit vents        | <input type="checkbox"/> Gable vents |
| <input type="checkbox"/> Powered ventilation | <input type="checkbox"/> Other       |

Ventilation notes / performance requirement

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## 8.0 Roofing Material

Material type

- |   |   |
|---|---|
| <input type="checkbox"/> Architectural shingles | <input type="checkbox"/> Designer shingles      |
| <input type="checkbox"/> Standing seam metal    | <input type="checkbox"/> Exposed fastener metal |
| <input type="checkbox"/> Low-slope membrane     | <input type="checkbox"/> Other                  |

Manufacturer / product line

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Color / finish

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Material notes

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## 9.0 Site Protection and Cleanup

Protection items

- |   |   |
|---|---|
| <input type="checkbox"/> Protect landscaping      | <input type="checkbox"/> Protect driveway / hardscape |
| <input type="checkbox"/> Protect HVAC / condenser | <input type="checkbox"/> Protect pool / patio         |

Cleanup requirements

- |   |   |
|---|---|
| <input type="checkbox"/> Daily cleanup        | <input type="checkbox"/> Final magnet sweep |
| <input type="checkbox"/> Haul away all debris | <input type="checkbox"/> Final walk-through |

Site protection notes

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## 10.0 Open Items and Final Selections

Still to be finalized

Shingle / metal color

Manufacturer or product line

Permit responsibility

Start date

Payment schedule

Warranty documents

Other open items

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## 11.0 Contractor Notes / Clarifications

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## Contractor Information

Company name

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Estimator / contact name

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Phone

Email

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Base bid amount

Decking unit price / allowance

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Bid exclusions or assumptions

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**Homeowner Sign-Off**

Name

Date

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Signature

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