



**RESPONSE TO  
REQUEST FOR QUALIFICATIONS**  
VIRGINIA MILITARY INSTITUTE  
ON-DEMAND CONSTRUCTION

**JON MANNIX**

*President*

R. E. Lee & Son, Inc.

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**ARLENE LEE**

*CEO / Principal*

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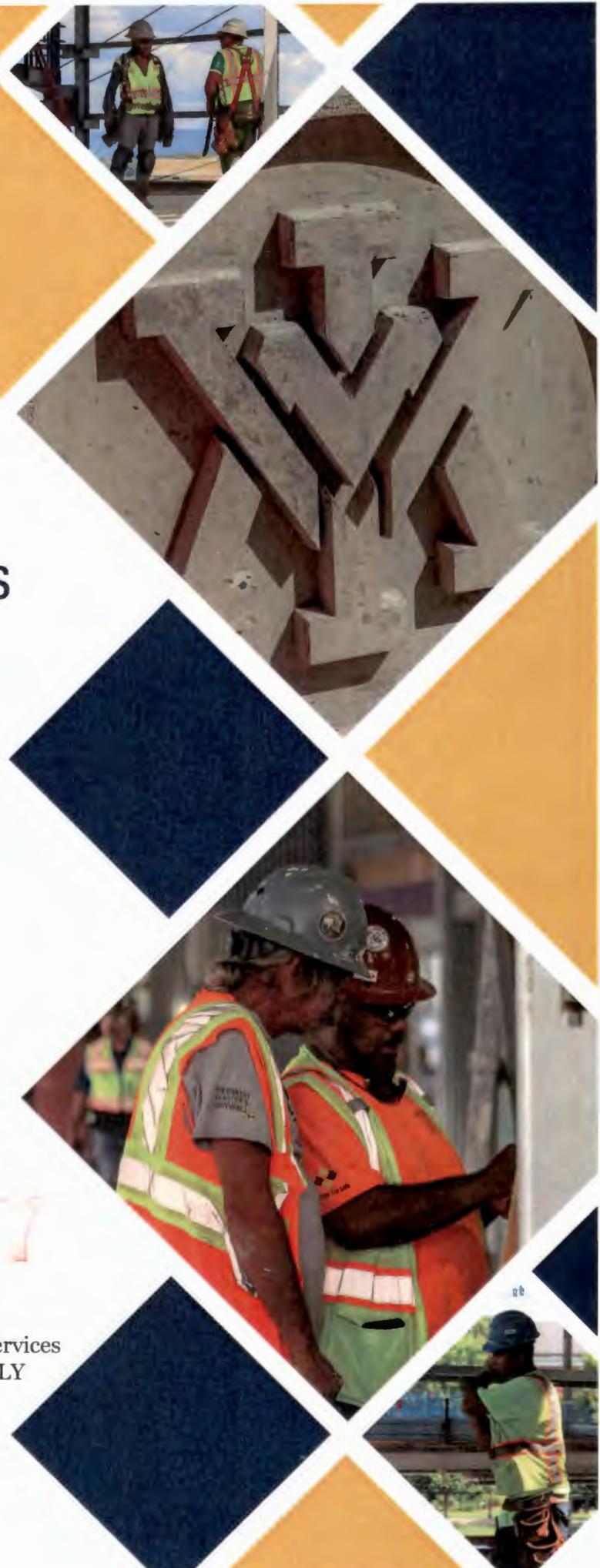
On-Demand Construction, Renovation and Repair Services

SET-ASIDE FOR SBSO Certified SWaM Vendors ONLY

RFP# **V211-19-074-03**

January 20, 2021

2:00 PM



**Virginia Military Institute**  
Lexington, Virginia 24450-0304

REQUEST FOR QUALIFICATIONS

RFP# V211-19-074-03

Issue Date: 18 December 2020

Title: On-Demand Construction, Renovation and Repair Services  
SET-ASIDE FOR SBSB Certified SWaM VENDORS ONLY

Due Date: 20 January 2021 at 2:00 PM EST (mailed to VMI Procurement Services)

Commodity Code: 91200 – Construction Services, General

Issuing Agency: Virginia Military Institute  
Procurement Services  
314 Smith Hall  
Lexington, VA 24450

Period of Contract: Date of Award through 31 December 2021 (Annually Renewable Thereafter for two (2)) successive one-year renewals). Contractors not initially awarded a contract through this solicitation may submit proposals annually after public solicitation following the prescribed method for submission found herein.

**Proposals should be mailed directly to the Issuing Agency shown above. Due to COVID 19 protocols, we are not available to accept hand-delivered proposals.**

IDENTIFICATION OF BID ENVELOPE: The signed bid should be returned in a separate envelope or package, sealed and identified as instructed in Section IX, paragraph H. The envelope should be addressed as directed in the heading of this Page of the solicitation. No other correspondence or other bids should be placed in the envelope.

All Inquiries for Information Should Be Directed To: MAJ Lynn Carmack, VMI Procurement Services at [carmacklw@vmi.edu](mailto:carmacklw@vmi.edu). The Understanding of Requirement Form (Attachment A) must be used for questions concerning specifications or statement of needs.

In Compliance With This Request For Proposal And To All The Conditions Imposed Therein And Hereby Incorporated By Reference, The Undersigned Offers And Agrees To Furnish The Goods/Services In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiation.

Name and Address Of Firm:  
R.E. Lee & Son, Inc.

2811 Hydraulic Road

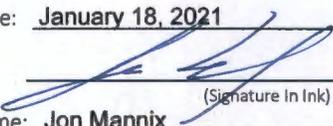
Charlottesville, VA

Zip Code: 22901

EVA Vendor ID or DUNS number E40204

E-mail: jmannix@relee.build

Date: January 18, 2021

By:  \_\_\_\_\_

(Signature In Ink)

Name: Jon Mannix

(Please Print)

Title: President

Phone: ( 434) 906.8474

Fax: ( ) \_\_\_\_\_

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against a bidder or offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.



2811 Hydraulic Road  
Charlottesville, VA 22901  
p | 434.973.1321  
relee.build

January 18, 2021

Major Lynn Carmack  
Procurement Services  
314 Smith Hall  
Lexington, VA 24450

RE: Request for Qualifications  
On Demand Construction Project Values \$50k-\$500K  
Project#V211-19-074-03

Dear Major Carmack,

Thank you for giving R.E. Lee & Son, Inc. the opportunity to provide our qualifications for Virginia Military Institute. The following RFQ response outlines several factors we believe make us uniquely qualified for these opportunities, including the following:

- **Highly Qualified Team** – The team that we have slated for these opportunities has the expertise, availability, and capacity to execute the work to the highest level. Beyond qualifications, this team understands how to partner and go above and beyond for the key stakeholders on these type of projects.
- **Corporate Depth** – Not only do we have an expert staff from RE Lee & Son, but we also have the broad and deep abilities of the RE Lee Companies umbrella providing unparalleled support to Virginia Military Institute.
- **Cost Effective** – Having been in the market for over 80 years, we have local relationships to help Virginia Military Institute save money for on-demand projects.
- **SWaM** – We are a 100% Women owned business, and we understand how important it is to give underutilized businesses the opportunity to grow and to succeed.

We are confident that we bring the dedication and experience to be a strong member of your team. Please let me assure you that no other firm will approach this project with the same energy, attention to detail, and collaborative mindset as R.E. Lee & Son, Inc.

Sincerely,

A handwritten signature in blue ink, appearing to read "Jon Mannix", is written over a light blue horizontal line.

Jon Mannix  
President  
R.E. Lee & Son, Inc.

## TABLE OF CONTENTS

1.

### 1. Qualifications and Experience

- a.) 1 - 2
  - b-c.) 3 - 4
- 

2.

### 2. Plan for providing services

- a.) 5 - 11
  - b.) 12
  - c.) 13
  - d-e.) 14
- 

3.

### 3. Small, Women-owned and Minority-owned Business (SWaM)

15 - 16

---

4.

### 4. Four (4) recent references

17

---

5.

### 5. Financial Stability

18 - 19

---

6.

### 6. Geographic Location

20

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7.

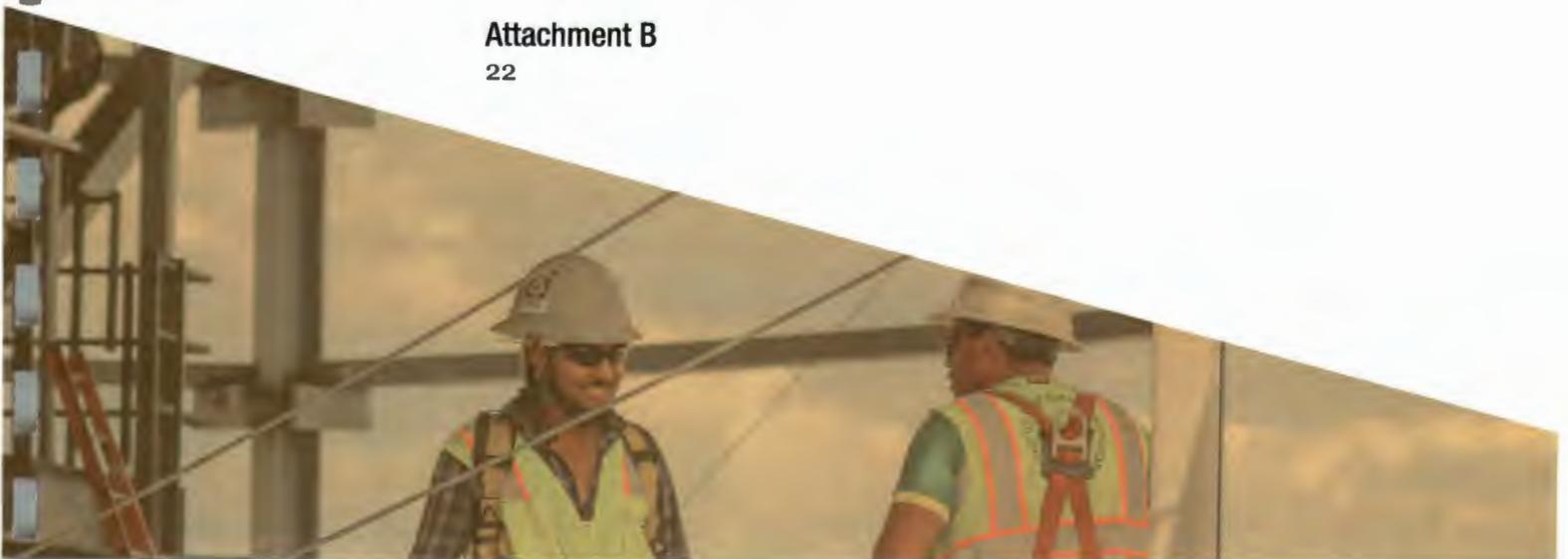
### 7. Return of Forms

21

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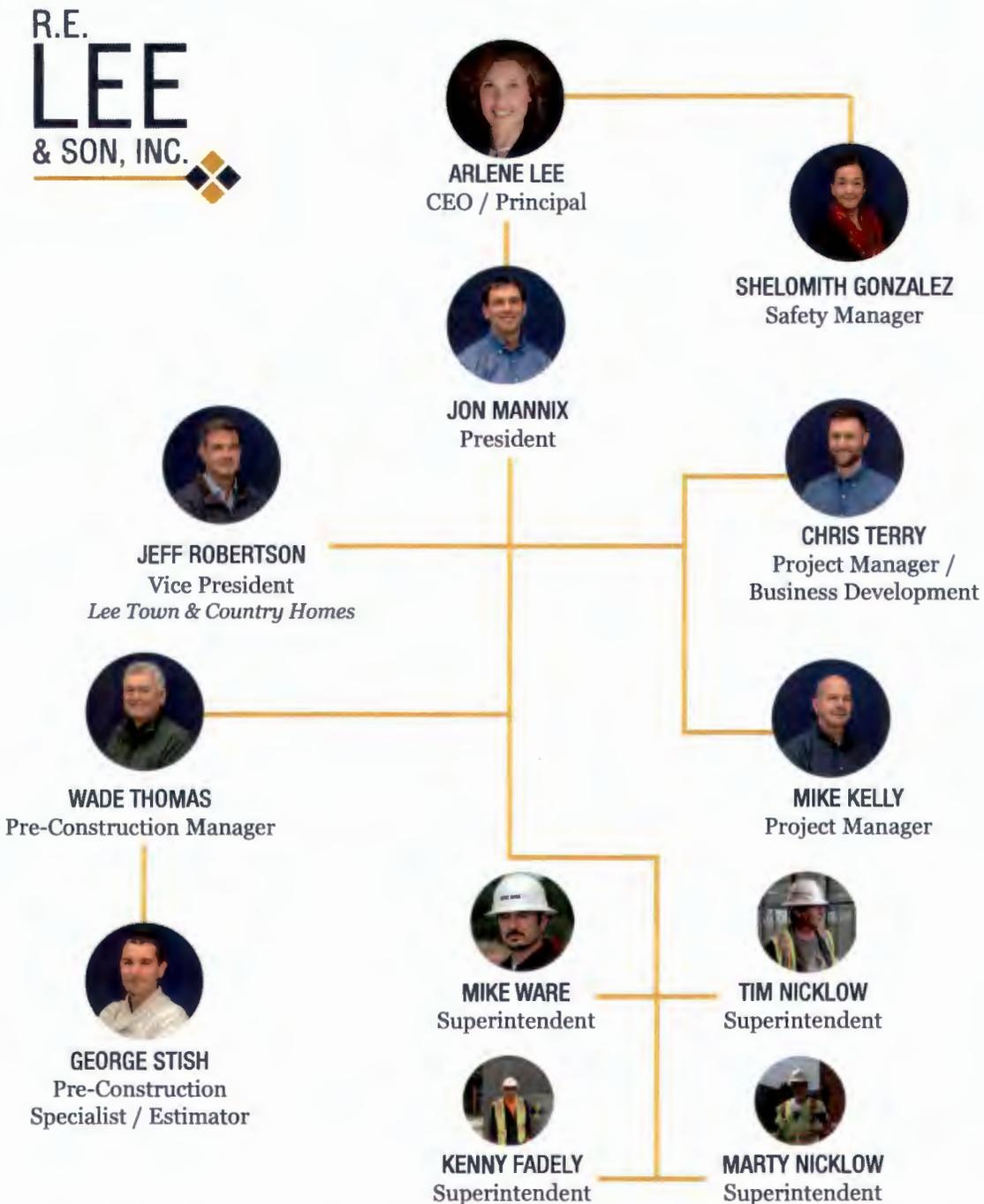
### Attachment B

22



# 1. Qualifications and Experience:

a. Provide an organizational chart indicating which individuals or positions would have knowledge of an agreement with the Institute, and the degree to which each person would be responsible to an Institute account, including names of project managers and construction superintendents. Include proof of required trade certifications.



# 1. Qualifications and Experience:

- a. Provide an organizational chart indicating which individuals or positions would have knowledge of an agreement with the Institute, and the degree to which each person would be responsible to an Institute account, including names of project managers and construction superintendents. Include proof of required trade certifications.

## Virginia Military Institute Team

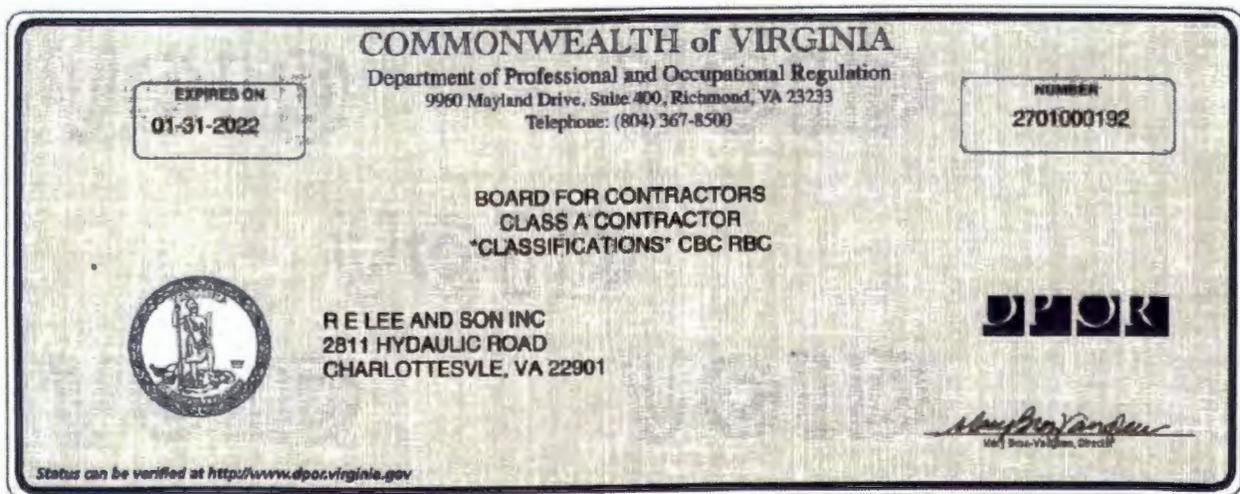
There is a saying in the construction industry that “People Build Buildings, not Companies.” By retaining R. E. Lee & Son, Inc. VMI has selected not only the company, but also the individuals, who will be assigned the On-Demand projects. The extensive experience of our people will allow effective implementation of the Owner’s requirements in an efficient manner.

Jon Mannix would be the point of contact for VMI and would delegate our resources accordingly. R. E. Lee & Son, Inc. recognizes the need for proper project staffing in order to meet the Post’s expectations for a quality project, done in a timely manner and within budget. We place special emphasis on team communication, safety and quality.

We provide people who are properly trained and empower them to perform at their highest potential. We will build a cohesive team between VMI, the design team, consultants, and subcontractors with mutual trust and respect creating an environment where the best solutions are implemented. Our strategy for the team is shared project objectives. We encourage to keep an open mind and practice active communication. Using this strategy will allow members to better anticipate and solve team problems, develop trust and establish commitment between all parties. The end result will aid in achieving VMI’s goals and project success for all.



JON MANNIX | PRESIDENT



(SEE REVERSE SIDE FOR PRIVILEGES AND INSTRUCTIONS)

**1. Qualifications and Experience:**

**b. Describe the offerors general experience in providing construction of the nature the Institute seeks.**

We have a long history of providing on-demand service through out the state.

**Previous Accounts**

Client Contact	Yearly Volume	Length of Service	Year Contract was Entered
<b>Virginia Military Institute</b> Lexington, VA Major Kathleen Thompson Phone: 434.982.5834	Most Recent: \$121,000	3 Years	2015-2018
<b>University of Virginia</b> Charlottesville, VA Donald Sundgren, CFO Phone: 434.982.5834	Varies; Most Recent: \$10,000,000	50+ Years	1960
<b>Federal Executive Institute</b> Charlottesville, VA Mike Mollia Phone: 434.980.6200	Varies; Most Recent: \$14,000	8 Years	2009
<b>Weinstein Properties</b> Glen Allen, VA Chuck Howard Phone: 804.283.4723	Most Recnt: \$2,000,000	3 Years	2009
<b>Woodberry Forest School</b> Woodberry Forest, VA Bruce Tibbets Phone: 540.672.6052	Most Recent: \$5,300,000	30+ Years	1980
<b>VA Chapter of Theta Chi</b> Charlottesville, VA Grady Lewis Phone: 434.326.1358	Most Recent: \$875,000	1 Year	2012
<b>Enterprise Properties</b> Charlottesville, VA Robert Dittmar Phone: 434.817.7249	Most Recent: \$100,000	30+ Years	1980
<b>Chabad of UVA</b> Charlottesville, VA Shlomo Mayer Phone: 434.293.5994	Most Recent: \$938,000	1.5 Years	2011

# 1. Qualifications and Experience:

- c. Provide a list of all the offeror's clients comparable to the Institute's indicating length of contract and the nature of each project. The Institute may contact and/or visit any of these clients.
- d. Provide a list of all clients lost within the last three years which includes: a) a contact name and telephone number, b) length of contract and c) reason for the loss. (Attachment C)

While we are not currently on any on demand list in the last two years, we have a strong history of providing exceptional service to many clients.

ATTACHMENT C

RFP# V211-19-074-03

CONTRACTOR DATA SHEET

QUALIFICATIONS OF OFFEROR: Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirement.

Indicate the length of time you have been in business providing this type of service. 82 Years  
0 Months

Provide a list of current references, either college, Educational Institutions, and/or other companies that your firm is servicing. Include the length of service, dollar volume, year contract was entered into, and the name and address of the person the State has your permission to contact. Such listing shall be comprehensive of your firm's customer base and can be formatted as follows:

CURRENT ACCOUNTS:

Account Name, Address & Phone #	Length of Service	\$ Volume/Year
None		

LOST ACCOUNTS:

Account Name, Address & Phone #	Length of Service	\$ Volume/Year
None		

## 2. Plan for providing services:

- a. Provide a complete and detailed description of the offeror's methodology and plan for providing the services described herein.

### MANAGEMENT PLAN

Our people listen to your concerns and understand your needs. We are committed to quality and sustainable practices. These are the foundations of our process that will create a new and enduring space, relying on proven building principles.

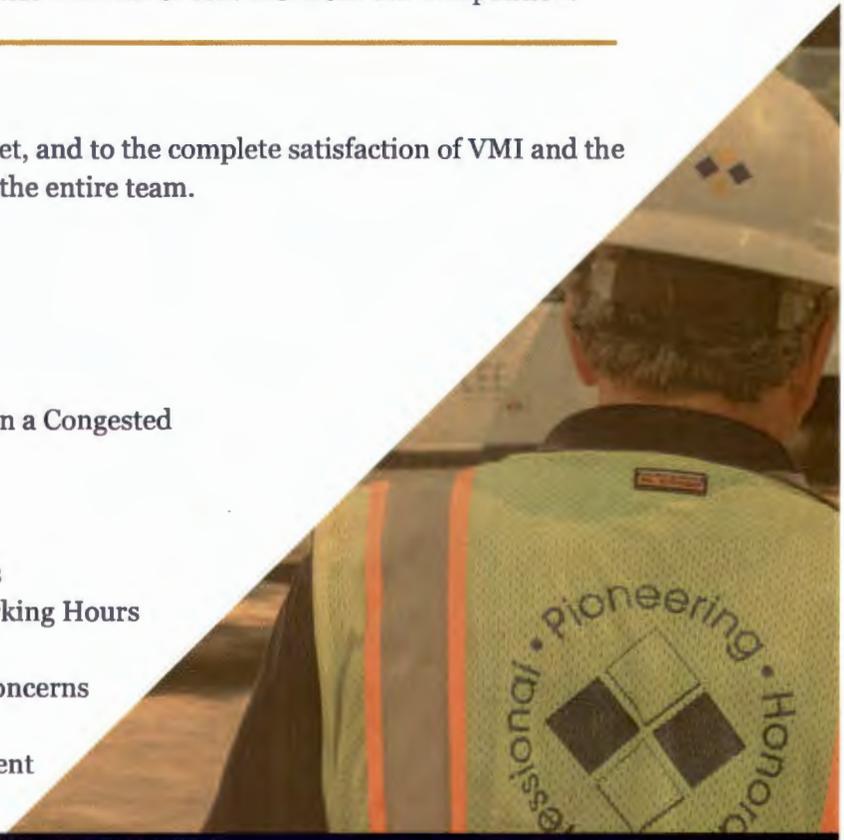
R.E. Lee & Son, Inc. will establish a teamwork atmosphere from the very beginning of each project with the Virginia Military Institute and the Design Team. We will pool our experience and expertise to work together to achieve the ultimate goal of delivering the highest quality within the established budget and schedule. This is not a new approach for our firm. For over 80 years, we have been teaming up with owners and architects to work together to meet these goals. R.E. Lee & Son, Inc. believes in establishing and maintaining open communication between the team members to make sure the entire team knows how the project costs are being developed, and how your money is being spent. Honesty, open communication, and not just listening to, but understanding, the needs of the Owner and the other team members will be the keys to this partnership. We believe our local knowledge, our reputation for quality construction and our past experience differentiates R.E. Lee & Son, Inc. from our competition.

### KEY COMPONENTS

Completing these projects on time, within budget, and to the complete satisfaction of VMI and the Design Experts will require the commitment of the entire team.

*Keys to success are:*

1. Preparation of a Procurement Plan
2. Contractor Management and Supervision
3. Coordination with the Project Team
4. Management of Site Logistics
5. Understanding the Challenges of Working in a Congested and Operational Environment
  - Debris Removal
  - Material Deliveries
  - Management of Work Area Access
  - Determining the Appropriate Working Hours
  - Assurance of Safety
  - Management of Environmental Concerns
6. Commitment to the Project Schedule
7. Asbestos & Hazardous Materials Management



## 2. Plan for providing services:

a. Provide a complete and detailed description of the offeror's methodology and plan for providing the services described herein.

### 1. Prepare a Procurement Plan:

We will use our knowledge of the Virginia market to award contracts to vendors and subcontractors on the basis of overall value, capacity to perform work, ability to deliver the level of quality desired, safety, performance and cost. We will provide a technical analysis of Subcontractor bids and offers and make recommendations to the Owner for Construction Subcontracts. We will also identify long lead items and coordinate their ordering and delivery so that the construction schedule is not adversely impacted.

### 2. Contractor Management and Supervision:

We will have a full time on-site superintendent for our work that is experienced, knowledgeable and skilled in executing the type of work to be performed. Providing full time experienced and qualified supervision of the work will be a key to success. During the construction phase, duties, including preparing schedules, planning daily activities, checking all materials for compliance with contract documents, organizing delivery of materials, and layout of the work will all be critical activities carried out by the Superintendent and Project Manager before the actual work begins. Oversight of the work of the subcontractors and field crews to guarantee quality compliance will be an ongoing requirement. Our team will also have primary responsibility for the safety of all personnel working on site, including subcontractors and our own crews that are working under our direction.



## 2. Plan for providing services:

- a. Provide a complete and detailed description of the offeror's methodology and plan for providing the services described herein.

### 3. Coordination with the Project Team:

Construction projects require a tremendous amount of coordination between designers, suppliers and contractors. Insuring that the correct information is passed to the appropriate party will be one of our primary responsibilities. Our 80+ years of experience managing construction projects has taught us that coordination between key team members is essential for proper and successful execution of the work. It is our goal to establish an effective working partnership between VMI, the Design Team, and R.E. Lee & Son from the very outset of this project.

### 4. Site Logistics:

A detailed logistics plan, specific to each project, will be prepared prior to mobilization on site. This will include considerations for security and safety, site access, material handling, parking, temporary utilities, and storage. This plan will be developed and coordinated with VMI and the Design Team to provide the most efficient use of the site while minimizing the impact on the project and to the surrounding property. This is especially relevant at VMI, where access is often limited, security is of paramount concern, and the working area around the building is constrained and populated. Timing of deliveries will be of particular importance to our project team so that delivery vehicles do not create traffic congestion around the site. Once on site, access to the specified work area will be by established and approved routes only. We understand that it is essential we keep driveways and entrances serving nearby facilities clear and available at all times. Job organization will be critical to success and the major component of organization is the proper storage and handling of materials.



## 2. Plan for providing services:

a. Provide a complete and detailed description of the offeror's methodology and plan for providing the services described herein.

### 5. Working in an Urban Environment:

A paramount challenge inherent to these projects will be to minimize the impacts to the ongoing activities at the Virginia Military Institute and the adjacent areas. Our previous experience with managing successful projects in occupied and/or secure facilities on educational campuses and on government projects has led us to understand the special accommodations that must be made in coordinating work activities so that they do not disturb the workflow or building occupants.



Following are a few examples:

- **Debris Removal:** It may be necessary to remove debris starting in early morning hours, into the night, or on weekends so that noise conditions are minimized and schedule requirements associated with this work are not compromised. Jobsite cleanliness is a focus of our superintendent. Our Superintendent will direct crews for cleaning up and removing debris from the project site. Housekeeping and debris removal are done on a daily basis and are essential in order to maintain maximum productivity for all trades. An axiom in the construction industry is that a clean job will be a profitable job.
- **Material Delivery:** To the greatest extent possible, materials and equipment will be delivered during non-peak work hours to avoid conflicts with normal traffic and deliveries to the facility. Deliveries and staging of materials will be scheduled well in advance in order to comply with security requirements, as well as minimize impact to pedestrian traffic and daily operations. Since access to the various sites is often limited, excellent coordination for deliveries of new construction materials must be established very early in the process.
- **Work Area Access:** The objective when working in a project setting of this type is to not be seen or heard. We will confine our presence to the specific work areas and access only by designated routes. Specific access provisions will be established for these projects. Access points will include provisions for bringing in equipment and materials and removing debris.

## 2. Plan for providing services:

a. Provide a complete and detailed description of the offeror's methodology and plan for providing the services described herein.

### 5. Working in an Urban Environment (Cont'd):

- **Work Hours:** If limited by noise restrictions or other functions, R.E. Lee & Son, Inc. will be available to work after hours and on weekends to maintain production and the construction schedule. We will review VMI's schedule for each project and are prepared to perform the work in conjunction with the schedule requirements. Overtime will be selectively scheduled for critical path activities to facilitate coordination and access. R.E. Lee will schedule off hours work and second shift work whenever possible to minimize premium time and to complete as much work in as short a time frame as feasible. Any and all "off hours" work will, of course, be subject to the approval of VMI and the appropriate members of the construction team.
- **Safety:** Concerns relating to work in a congested and secure environment will make safety even more of an important issue than on the typical construction project. Taking the appropriate safety measures to insure the well being of all workers and the cadets, staff, and visitors will be the most important issue throughout each project. Our workers will be required to wear personal protective equipment (hard hats and safety glasses) and will be clearly identified with ID badges and safety vests. Clear and accessible entrances and paths will be maintained in our work areas.

One initiative our team has taken is to be more inclusive of those that speak primarily spanish. We provided them with headsets to listen in realtime to a spanish translator at our annual meeting and annual safety field day. We also perform safety meetings, tool box talks, and more in both English and Spanish. We believe language should not be a barrier.



## 2. Plan for providing services:

a. Provide a complete and detailed description of the offeror's methodology and plan for providing the services described herein.

### 5. Working in an Urban Environment (Cont'd):

#### • Environmental Concerns:

- Of paramount importance will be the safety, comfort and well-being of the building occupants and passersby. R.E. Lee & Son will assess the building, designated workspaces, and adjacent areas carefully and will develop an Environmental Health and Safety Plan unique to this project. This plan will identify potential issues and address the management, control, and mitigation of environmental and life safety concerns. Examples of standard procedures implemented on current and past projects include:
- Mapping out all air intakes, entrances, windows, and other means of infiltration into occupied spaces, and then taking action to control the passage of fugitive emissions into areas of concern.
- Review of construction areas and how they relate to emergency egress pathways in order to assure that there are no conflicts or life safety issues.
- Early (prior to construction) investigations into the normal flow of building users and peak times of work/occupancy in order to establish the most appropriate times and routes for material deliveries/ debris removal.
- A thorough assessment of each specific project and neighboring facilities to determine project-specific management practices related to noise and/or other potential disturbances in order to minimize disruptions and interruptions .
- Management of MSDS information and dissemination of data to all appropriate parties within the Office of Environmental Health and Safety, or other governing authority.
- Defining procedures and information unique to each project, such as use of facility-specific forms and correct routing for items such as Hot Work Permits, Outages/Service Interruptions and other related submissions.
- These are but a few examples of the many ways in which we strive to protect the health, safety, and comfort of the building occupants with whom we share a space while the project is underway. As mentioned above, a much more detailed and project-specific plan will be developed upon notice that we have been selected as your partner of choice for this project.



## 2. Plan for providing services:

a. Provide a complete and detailed description of the offeror's methodology and plan for providing the services described herein.

### 6. Commitment to Project Schedule:

- We understand that completing construction projects on time is of utmost importance under any circumstances, and is especially important when performing small projects that impact the operations and workflow of occupants and operations. The entire R.E. Lee & Son project team is committed to keeping each and every project on schedule at all times.
- Projects of this type requires that the process of material approvals, procurement, and delivery begin immediately upon receipt of the Notice to Proceed. Cooperation will be needed between all team members, including subcontractors/vendors to expedite approvals, and we are confident that this will be a process easily accomplished through the channels of open and frequent communication, accountability, and dedication to the project.
- Procurement for any long lead items will be accomplished as soon as possible to be sure materials are available when needed. We will issue purchase orders and establish firm delivery dates for materials immediately after the contract award. Shop drawing preparation and submittals will begin in the first week for each project.
- Keeping the project on schedule will require excellent coordination between VMI the Design Team, Lee and our Subcontractors. We will conduct Weekly Job Meetings to schedule activities and insure that we are meeting our overall schedule commitments. We will work closely with subcontractors in the preparation of the interim short duration schedules so that each team member has the same goal and commitment to meet the substantial completion date.
- A detailed CPM schedule will be developed as the first order of business following award. This schedule will be reviewed and updated by the Lee team on a weekly basis and will be presented to VMI and other team members at every progress meeting, or more frequently, if requested, in order to assure that the project is tracking to everyone's expectations.

### 7. Asbestos & Hazardous Materials Management:

R.E. Lee & Son is Lead Safe certified firm (certificate #NAT-39140-1), and we are keenly aware of the need for capable and proficient management of any project where hazardous materials may be present. We understand that there is always the possibility of encountering hazardous materials when working in existing buildings and environments, even when none are anticipated, and we proceed accordingly.



## 2.

### Plan for providing services:

#### b. Describe the offeror's commitment to the Institute in terms of resources, personnel, investment, etc.

R. E. Lee & Son, Inc. has the resources and personnel to commit to any and all projects awarded through the On-Demand Construction program.

The exceptionally qualified team of construction professionals at R. E. Lee & Son, Inc. holds proven experience and capabilities in providing project and construction management services to a diverse group of owners and end users. Each member of our team recognizes the responsibility that accompanies their role as a partner to VMI and we view this opportunity to continue to build a strong relationship as a contributing partner to the long-term success of the Post in the future.

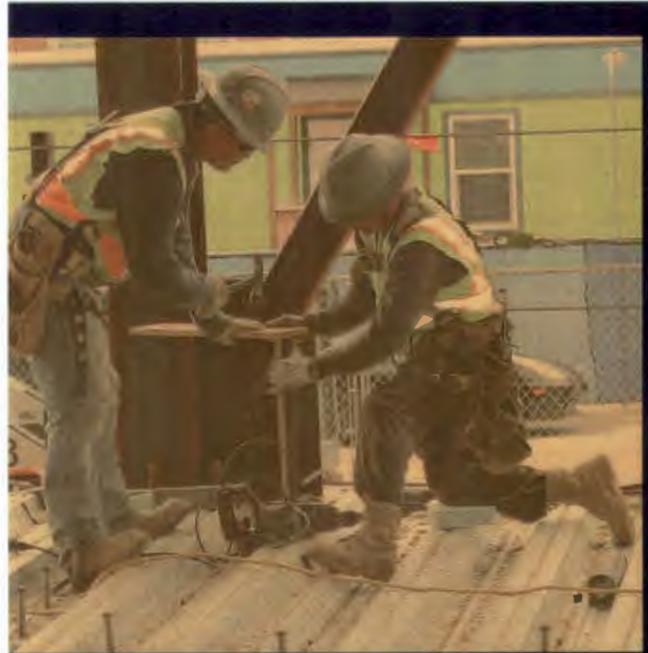


## 2. Plan for providing services:

### c. Provide a list of the subcontractors the offeror would use to provide subcontracting.

Solicited subcontractors will be dependent upon the scope and complexity of work for each individual project in the On-Demand program, and award will be made on the basis of completeness of scope, quality, and price. We are committed to contracting with SWaM certified firms for every possible opportunity, and therefore, this will also become a factor for award. Following is a list of firms that we bid with regularly on various projects throughout the state:

Advanced Concrete (#669290-WS)  
 B&B Electric  
 B&L Flooring  
 Barranger Company (#9291-S)  
 Blauch Brothers (#649656-S)  
 C&C Construction  
 Casey Concrete(#675484-WS)  
 Ceiling & Floor Shops (#10446 - S)  
 Davis Masonry & Construction  
 Dodson Glass & Mirror, Inc (#667720-WS)  
 DSM Construction LLC (#683829-S)  
 Einstein's Stroke of Genius (#660397-S)  
 Fire-X  
 Ground Effects (#696303-S Micro)  
 Harper Electric  
 Industrial Fabricators (#10216-S)  
 K & E Sprinkler  
 L&D Coates (#682608 - S Micro)  
 Liphart Steel Co (#9936-S)  
 M3 Masonry (#652655-WS)  
 McDaniel (#703492 - S)  
 Mid Valley Electric (#10606 - S)  
 Mike's Glass & Mirror (#674543- S)  
 Momentum Earthworks (#700293-S)  
 Montebello Contract Service  
 Myers & Whitesell (#704226 - S Micro)  
 Piedmont Concrete Contractors( #669771- WS)  
 Piedmont Plaster & Drywall (#669843- WS)  
 Right Touch Painting  
 S&K Contracting  
 Semco Services, Inc (#649188- S)  
 Sullivan Mechanical Contractors, Inc (#671004-S)  
 Surfaces by Barrows (#7154860-S)  
 The Glass Doctor  
 Town Flooring



## 2. Plan for providing services:

- d. Provide representation that the prices, terms, warranties and benefits specified in the proposal are comparable to or better than the equivalent terms being offered by the offeror to any present customer.

As per paragraph VII.B.2.d, R.E. Lee & Son, Inc. assures the Virginia Military Institute that all prices, terms, warranties, and benefits specified in this proposal are equivalent to terms being offered to all present customers.



## 2. Plan for providing services:

- e. Comment on your willingness to furnish Commonwealth of Virginia Standard Performance and Labor and Material Payment Bonds for some projects when requested by the Institute.

Our surety agent (Scott Insurance) is prepared to support our firm with the necessary bonding for the On-Demand Construction program. Willingness to provide performance and payment bonds (if required) is subject to their satisfaction of the prevailing underwriting conditions at the time of the bond request including, but not limited to, job specifications, contract terms, required bond forms, and confirmation of full project financing.

All bonds will be issued through Merchants Bonding Company rated A by A.M. Best. Merchants Bonding Company is also listed with the U.S. Treasury Department and is licensed to conduct surety business in the Commonwealth of Virginia.

### 3. Small, Women-owned and Minority-owned Business (SWaM):

This solicitation is SET-ASIDE for certified Small, Woman-owned, and/or Minority-owned businesses. Only those businesses certified by the Virginia Department of Small Business and Supplier Diversity are eligible to respond to this solicitation.

#### Women Owned Business

We are one of the 0.05% of construction companies in this country run by a woman CEO, Arlene Lee. As a SWaM (Small, Woman, or Minority run business) we understand the impact we can make in our community. As a woman owned and run company, we are passionate about lifting others up whether it is as individuals or in business. We diligently seek out other capable SWaM companies to create opportunity pathways. Continual improvement and learning are core to everything we do and this includes training and bringing our trade partners along. We know this investment is crucial in supporting the next generations success. As a SWaM company, we are willing to go above and beyond to demonstrate our ability to provide the services required Virginia Military Institute. We want to be part of your success and know how to make it happen.



**SWaM** Small, Women and Minority-Owned

*Supplier Diversity Strengthens the Commonwealth*

by the Virginia Department of Small Business & Supplier Diversity

#### R. E. Lee & Son, Inc.

Catherine Ann Claffin  
2811 Hydraulic Road  
Charlottesville, VA 22901  
Phone: (434) 973-1361  
Fax: (434) 973-9784  
cclaffin@releecommunity.com

Certification Number: 689701

#### SWaM Certification Type:

Small Start Date: 08-03-2020

Women-Owned Start Date: 08-03-2020

SWaM Expiration Date: 08-03-2025

NIGP Code and Description:

90024

Building Construction,  
Commercial and  
Institutional

Pcard: N

Business Category: Construction

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ATTACHMENT E

RFO# V211-19-074-03

#### Small Business Certification

##### Definitions

Small Business: "Small business" means an independently owned and operated business which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years. Note: This shall not exclude 585D-certified women- and minority-owned businesses when they have received 585D small business certification.

Women-Owned Business: Women-owned business means a business concern that is at least 51% owned by one or more women who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, or in the case of a corporation, partnership or limited liability company or other entity, at least 51% of the equity ownership interest is owned by one or more women who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, and both the management and daily business operations are controlled by one or more women who are citizens of the United States or non-citizens who are in full compliance with the United States immigration law.

Minority-Owned Business: Minority-owned business means a business concern that is at least 51% owned by one or more minority individuals or in the case of a corporation, partnership or limited liability company or other entity, at least 51% of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more minority individuals and both the management and daily business operations are controlled by one or more minority individuals.

All small businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (585D) by the due date of the solicitation to participate in the SWaM program. Certification applications are available online at [www.sbsd.virginia.gov](http://www.sbsd.virginia.gov).

Offeror Name: R.E. Lee and Son, Inc.

Preparer Name: Jon Mannix

Date: January 18, 2021

##### Instructions

- A. Businesses certified by the Department of Small Business and Supplier Diversity (585D) as a small business must complete Section A of this form.

##### Section A

CERTIFICATION TYPE (check only one below):

- Small Business
- Small and Women-owned Business
- Small and Minority-owned Business

Certification number: 669791 Certification Date: 08-03-2020

Expiration Date: 08-03-2025

NOTE: It is your responsibility to ensure that your certification is renewed and does not lapse. Should your certification expire, you will no longer be eligible to receive awards under this contract.

**4.**

Four (4) recent references, either educational or governmental, for whom you have provided the type services described herein. Include the date(s) the services were furnished, the client name, address and the name and phone number of the individual the Institute has your permission to contact. (See Attachment D)

**Weinstein Properties**

Chuck Howard

804.283.4723

*11 years starting in 2009*

3951 Stillman Parkway  
Glen Allen, VA 23060

**University of Virginia**

Donald Sundgren, CFO

434.982.5834

*50+ Years starting in 1960*

1450 Leake Drive  
Charlottesville, VA

**Village School**

Eliza O'Connell, Head of School

434.409.0946

215 E High St  
Charlottesville, VA 22902

**Albemarle County**

Office of Facility Development

Lisa Glass, Project Manager

434.872.4501

401 McIntire Road  
Charlottesville, VA 22902



**6. Geographic Location:**  
Provide information regarding the locations of company offices relative to this proposal.

R.E. Lee & Son is located centrally in Charlottesville, VA, approximately one hour from VMI. Our available resources and personnel allow us to work efficiently throughout the state, and we regularly perform work as far south as Danville, west to West Virginia, north to Culpeper, and east outside of Richmond. Supplying the Institute with quality construction services is well within our geographic range.

Current and recent project locations:



- 7.** The return of the General Information Form and addenda, if any, signed and filled out as required.

(Included within this response)



ATTACHMENT B

CONFLICT OF INTEREST STATEMENT

RFP# V211-119-074-03

Ensure that the solicitation is thoroughly read and completed. Complete, sign and return the information requested below with your proposal. FAILURE TO FURNISH THIS DATA MAY RESULT IN REJECTING YOUR PROPOSAL.

NAME: R.E. Lee & Son, Inc.  
ADDRESS: 2811 Hydraulic Road  
CITY/STATE: Charlottesville, Virginia 22901  
TELEPHONE NUMBER: 434.973.1321  
FEDERAL ID NUMBER (FIN): 00457184

THE ABOVE FIRM IS A: (CHECK, AS APPLICABLE)

- |  |   |
|--|---|
| <input checked="" type="checkbox"/> SMALL BUSINESS       | <input type="checkbox"/> INDIVIDUAL BUSINESS    |
| <input checked="" type="checkbox"/> WOMAN-OWNED BUSINESS | <input type="checkbox"/> SOLE PROPRIETORSHIP    |
| <input type="checkbox"/> MINORITY-OWNED BUSINESS         | <input type="checkbox"/> PARTNERSHIP            |
| <input type="checkbox"/> SHELTERED WORKSHOP              | <input checked="" type="checkbox"/> CORPORATION |

RELATIONSHIP WITH THE COLLEGE OF VIRGINIA:

IS ANY MEMBER OF THE FIRM AN EMPLOYEE OF THE COMMONWEALTH OF VIRGINIA WHO HAS A PERSONAL INTEREST IN THIS CONTRACT PURSUANT TO THE CODE OF VIRGINIA, SECTION 2.1-639.1-639.24?  YES  NO

IF YES, EXPLAIN:

  
SIGNATURE OF OFFEROR \_\_\_\_\_ DATE January 18, 2021

Please tell us how you received this solicitation:

- It was mailed to you directly.
- You requested a copy through the Virginia Business Opportunities.
- You obtained a copy from the Virginia Department of Minority Business Enterprise.
- Other (please specify) \_\_\_\_\_



2811 Hydraulic Rd.  
Charlottesville, VA 22901

434.973.1321  
relee@releecommunity.com  
www.relee.build

**Jon Mannix**  
President  
jmannix@relee.build  
434.906.8474

