

Case Study: Portfolio Roof Planning for a Multi-Site Faith-Based Organization

Standardized roof condition baseline and a 5-year budget roadmap across 65 occupied properties in New York City

Note: Client name anonymized by request.

Client snapshot	
Portfolio	65 occupied properties across New York City (primarily churches and schools)
Roof systems	Flat commercial roofs - mostly modified bitumen; TPO and EPDM across select sites
Constraints	Historic buildings; active occupancy; limited access windows; seasonal scheduling around school and religious holidays
Primary goal	Better budgeting and prioritization of limited funds while extending roof life (with an energy-usage reduction initiative)

Executive summary

A multi-site faith-based organization in New York City operates 65 occupied properties. Leadership wanted a portfolio-wide program to extend roof life and reduce energy usage, while facilities and finance needed a consistent way to prioritize spending across sites.

Roofus delivered standardized roof assessments and a planning workflow: building-by-building reports with defect locations, remaining roof life, repair estimates, and contractor-ready scopes - plus an immediate action plan and a five-year budget roadmap with repair-vs-replace scenarios.

Key outcomes

65	3	15	5
Roofs assessed	Critical roofs identified	Sites with quick-win repair recommendations	Year budget roadmap

Speed: Standardized reporting delivered within 3 business days per completed assessment.

The challenge

Roof decisions were often made reactively - solving problems within seasons rather than years. Site managers felt the impact most directly, while central leadership needed clearer justification for major spend.

- **Which roofs are failing vs repairable?** The team lacked a consistent baseline across the portfolio.
- **Defensible prioritization for finance:** It was difficult to explain why certain sites should be funded first.
- **Emergency repairs consumed planned capital:** Urgent fixes repeatedly disrupted budget and scheduling.
- **Complex operating environment:** Historic, occupied buildings with limited access windows and seasonal constraints.

Roofus approach

Roofus combined field assessment with standardized scoring and templates to translate roof conditions into a portfolio-level plan.

1. Portfolio intake	Aligned goals (roof life extension and energy-usage reduction), gathered roof histories, and captured access constraints.
2. Assessment	Inspections and site walks supported by documentation review, drone imagery, and moisture scans where appropriate.
3. Standardize	Consistent taxonomy, scoring, and templates; centralized photos, drawings, and findings in a digital repository.
4. Recommend	Per roof and roof section: remaining life, repair/restore/replace pathways, repair estimates, and bid-ready scopes.
5. Plan	Immediate action plan plus a five-year budget forecast and sequencing across 65 sites.

Deliverables (what the team received)

- **Building reports:** defect locations, photos/drawings, remaining roof life, repair estimates, and scopes of work.
- **Portfolio roll-up:** prioritized list across 65 sites (critical, near-term, monitor).
- **Budget planning:** five-year forecast by year with repair-vs-replace scenarios.
- **Procurement support:** bid scopes and estimate support to reduce vendor back-and-forth.
- **Program cadence:** monitoring plan for refresh assessments and decision updates.

Results and impact

With standardized data and a single portfolio view, facilities and finance could plan work across the year, reduce emergency-driven decisions, and allocate limited funds more confidently.

- **Faster decisions:** 3-business-day report turnaround per completed assessment supported time-sensitive planning windows.
- **Clear prioritization:** 3 roofs escalated as critical; 15 sites received quick-win repair recommendations to extend roof life.
- **Budget clarity:** A five-year capital roadmap connected roof condition to year-by-year funding needs.
- **Less rework:** Standardized documentation and bid-ready scopes reduced vendor back-and-forth and accelerated estimates.

Before vs after

Before	After
Reactive fixes driven by urgent leaks and seasonal constraints	Immediate action plan plus a five-year capital roadmap
Hard to defend priorities to finance and leadership	Standardized scoring and reporting for defensible prioritization
Emergency repairs frequently consumed planned capital	Sequenced plan: critical work, quick wins, and monitor items
Repeated back-and-forth with vendors on scope and documentation	Centralized records and bid-ready scopes to streamline procurement

Stakeholder takeaway (inferred): Standardized roof condition data and remaining-life estimates helped align site managers, facilities, and finance on priorities - and supported planning around access constraints instead of reacting to the next emergency.

What's next

Maintain the baseline through an ongoing monitoring cadence (annual refresh and post-event checks as needed) to keep remaining-life estimates current, track completed work, and update the five-year plan as funding and conditions change.

How Roofus helps portfolio owners: Roofus standardizes roof condition data across every building and builds repair-vs-replace scenarios so leadership can allocate limited funds with confidence.