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Continuing the Legacy
Continuing the Legacy

1.0 GSA’s Design Excellence Program
Continuing the Legacy

1.0 GSA's Design Excellence Program

2004 marks the 10-year anniversary of the Design Excellence Program. The program has resulted in dramatic improvements in the design of federal buildings and the positive perceptions Americans have of their government. Implementation of the Design Excellence mandate by GSA's regions is enhancing cities across the nation. We now have a track record—a design legacy—that we and future generations can point to with pride.

Over time, we have refined and improved the program. This comprehensive publication—Design Excellence: Policies and Procedures—replaces the 2000 desk guide. While the values and commitment driving the program remain the same, we have fine-tuned the process in several important areas. The commitment and involvement of private-sector professionals as national peers has been significantly expanded to include more than 500 distinguished experts not only in architecture, preservation, and urban design, but also interior design, landscape architecture, construction, engineering, art, and art conservation. Sample documents and templates are now available on-line at http://insite.pbs.gsa.gov/PM/PMB/Design_Excellence_and_the_Arts. Prototypes for FedBizOpps announcements have been tailored to meet the requirements of specific project types—new construction, border stations, modernizations, preservation, and limited scope projects. A/E Evaluation Board scoring sheets have been standardized to generate consistency in selection criteria and the weighting of these criteria. Details on using charrettes as part of the A/E selection process are spelled out. There is expanded information on the number and timing of peer reviews during the concept development phase of a project. Finally, Art in Architecture procedures are now incorporated as an integral element of the Design Excellence process.

What we seek in Design Excellence is a holistic approach that, on behalf of our customers, delivers value by producing high quality, high performance facilities on budget and on time. Your commitment and hard work implementing the Design Excellence policies and procedures will help GSA meet its goal of providing superior workplaces that enhance the nation's communities.
2.0  GSA’s Public Buildings Service
2.1  Design Excellence Objectives—Program Overview
2.2  Design Excellence Policies and Procedures
2.3  Guiding Principles for Federal Architecture
The Design Excellence Mandate

2.0 GSA's Public Buildings Service

Builder for the federal civilian government and steward of many examples of outstanding public architecture, the U.S. General Services Administration is establishing a reputation as a world-class real estate development and management organization. Under the auspices of its Public Buildings Service, GSA owns over 1,600 properties and leases more than 6,400 buildings and spaces. Ongoing projects represent $10 billion of work including new construction, major renovations, preservation, and adaptive re-use. GSA manages 414 historic buildings, 33 of which are national historic landmarks, and has an inventory of 336 million square feet, the workspace for 1.1 million federal employees.

2.1 Design Excellence Objectives

In meeting the challenges associated with the stewardship of these resources, GSA's performance standard is Design Excellence—buildings that express the vision, leadership, and commitment of the government to serving the public and the values of the nation. More specifically, Design Excellence in the Public Buildings Service means:

- Providing best value to our customer agencies and the American taxpayer.
- Developing safe, productive, and attractive workplaces.
- Operating efficiently and effectively—keeping projects on time and on budget.
- Ensuring that projects respond positively to national urban and environmental policies.
- Selecting America's best designers and artists to create facilities that ultimately become respected landmarks.

The PBS approach is holistic, incorporating expertise in many areas—architecture, urban design, landscape architecture, interior design, art, engineering, construction, security, sustainability, and workplace design. Design Excellence is about using this expertise to deliver projects that are exceptional—models others seek to emulate. In this effort, Design Excellence is neither veneer nor luxury. It is an integral feature of the GSA culture and how the Public Buildings Service addresses its work.
Design Excellence Policies and Procedures—Program Overview

This publication describes the policies and procedures for achieving Design Excellence results in new construction, modernization, preservation, and renovation. It sets decision-making priorities. It details Design Excellence processes and schedules. It spells out who should be involved and these individuals’ respective roles.

In terms of organization, since Design Excellence is most easily and cost-effectively achieved in the early phases of a project, this book covers the following procedures and phases:

- Design Excellence Planning
- Design Excellence and Site Selection Priorities
- FedBizOpps—Defining and Announcing Design Excellence Opportunities
- Strategies for Selecting the Lead Designer and Design Excellence A/E Team
- Design Excellence in the Concept Development Process
- Art in Architecture Guidelines

So that project managers have what they need to implement the Design Excellence process, most chapters have a resources section that includes templates and examples of critical Design Excellence documents. Documents are also available on-line at http://insite.pbs.gsa.gov/PM/PMB/Design_Excellence_and_the_Arts.

The formal Design Excellence Program was established in 1994 and, based on experience and evaluations over the past decade, has been refined and expanded in such areas as FedBizOpps announcements, the option to include a charrette as part of Stage II team interviews, and a more comprehensive approach to design reviews and concept development. These modifications are fully explained in this publication.
The Design Excellence Mandate

At the same time, a consistent and essential focus remains: thoughtfully defining project requirements and selecting the most capable lead designer and A/E team. Another constant had been the involvement of distinguished private-sector professionals in the disciplines of architecture, urban design, historic preservation, landscape architecture, interior design, art, art conservation, engineering, and construction—national peers appointed biennially to the Commissioner's National Register of Peer Professionals—as voices in the selection of designers and the critique of projects through concept development. The insights and expertise of these individuals are invaluable in helping GSA fulfill its Design Excellence mandate.

What is absolutely clear is that, as it has evolved, the Design Excellence approach to decision-making significantly enhances the success of GSA projects for customers and the American public. In this context, the managers responsible for GSA commissions should closely follow these policies and procedures.

In 1962, President John F. Kennedy disseminated Guiding Principles for Federal Architecture. These principles stated that the government should (1) produce facilities that reflect the dignity, enterprise, vigor, and stability of the federal government, emphasizing designs that embody the finest contemporary architectural thought; (2) avoid an official style; and (3) incorporate the work of living American artists in public buildings. It was an initiative where each building would be both an individual expression of design excellence and part of a larger body of work representing the best that America's designers and artists could leave to later generations. Some 40 years later, Design Excellence is making this aspiration a reality.
2.3 Guiding Principles for Federal Architecture

1 The policy shall be to provide requisite and adequate facilities in an architectural style and form which is distinguished and which will reflect the dignity, enterprise, vigor, and stability of the American National Government. Major emphasis should be placed on the choice of designs that embody the finest contemporary American architectural thought. Specific attention should be paid to the possibilities of incorporating into such designs qualities which reflect the regional architectural traditions of that part of the Nation in which buildings are located. Where appropriate, fine art should be incorporated in the designs, with emphasis on the work of living American artists. Designs shall adhere to sound construction practice and utilize materials, methods and equipment of proven dependability. Buildings shall be economical to build, operate and maintain, and should be accessible to the handicapped.

2 The development of an official style must be avoided. Design must flow from the architectural profession to the Government, and not vice versa. The Government should be willing to pay some additional cost to avoid excessive uniformity in design of Federal buildings. Competitions for the design of Federal buildings may be held where appropriate. The advice of distinguished architects ought to, as a rule, be sought prior to the award of important design contracts.

3 The choice and development of the building site should be considered the first step of the design process. This choice should be made in cooperation with local agencies. Special attention should be paid to the general ensemble of streets and public places of which Federal buildings will form a part. Where possible, buildings should be located so as to permit a generous development of landscape.

Report to the President by the Ad Hoc Committee on Federal Office Space, June 1, 1962.
3.0
Introduction
3.1 Collaborating with the Office of the Chief Architect
3.2 Clarifying Design Excellence Goals and Priorities

Design Excellence Planning

Policies and Procedures
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Design Excellence Planning

3.0 Introduction

Because of the complexity of Design Excellence projects, having an overview of the entire process is critical. This includes key milestones, an understanding of who needs to collaborate at different points in the process and when tasks need to be coordinated, design priorities, and budget strategies. In addition, it is essential to identify Design Excellence challenges. These are unique to each project. They can range from site and special design requirements to customer concerns and tight budgets. What is important, even as new challenges emerge, is to put all of them in the context of the big picture in a way that does not compromise the Design Excellence process and objectives.
### Overview of Design Excellence Project Phases
Design Excellence Objectives and Interface with the Office of the Chief Architect

#### PROJECT PHASES

- **Design Excellence Planning**
  - FedBizOpps
    - Selecting the Lead Designer-A/E Team
      - Concept Development/Peer Review
        - Art in Architecture
          - Catalyze Community Development
          - Ensure Design Excellence Quality and Appropriate Federal Presence
          - Promote Sustainability
          - Provide an Open Yet Secure Site
          - Prepare Accurate Project Description and Requirements
          - Determine the Best Selection Process
          - Appoint a Professionally Qualified A/E Evaluation Board
          - Encourage Talented Lead Designers to Apply
          - Shortlist Highly Qualified Lead Designer-A/E Teams
          - Recommend the Best Lead Designer-A/E Team
          - Time the Peer Reviews to Effectively Improve Concepts
          - Hold Additional Peer Reviews as Needed
          - Schedule Commissioner’s Concept Review
          - Initiate Art in Architecture Process as Early as Possible
          - Appoint Professional Art in Architecture Panel
          - Develop Effective Collaboration with the Lead Designer
          - Hold Art Workshops as Needed to Refine Projects

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8 **Chapter 3 Overview**
**Design Excellence Planning**

**OCA INTERFACE**

- Review FedBizOpps Announcement
- Determine with OCA if a Charrette or Vision Competition is Desirable

- Appoint National Peer and OCA Representative to A/E Evaluation Board
- Concur in Make-Up of Entire A/E Evaluation Board
- Coordinate Schedule of Portfolio Reviews and Team Interviews
- Coordinate Charrette or Vision Competition if Required

- Coordinate Peer Reviews
- Coordinate Commissioner's Concept Review

- Appoint Art Peers
- Convene Art in Architecture Workshops
- Submit Final Proposals for Approval
3.1 Collaborating with the Office of the Chief Architect

Design Excellence success necessitates close collaboration between the regional project manager and the Office of the Chief Architect. Initially, OCA works with the region to help determine the best A/E selection process for each project, especially with respect to convening a charrette or vision competition. It may also assist in assuring compliance with project budget and schedule mandates as well as the analysis of critical building systems. A specific OCA project coordinator is assigned to each Design Excellence project. This person participates in the review of the FedBizOpps announcement prior to posting and the scheduling of the Commissioner’s concept review. Other important OCA activities are the Center for Design Excellence and the Arts’ responsibilities for the appointment of the national peer to the A/E Evaluation Board, for scheduling national peer participation in the lead designer portfolio review and the lead designer-A/E team interviews, for organizing and scheduling all charrettes and vision competitions, and for scheduling and appointing national peers to participate in all peer reviews.

3.2 Clarifying Design Excellence Goals and Priorities

The following are Design Excellence priorities for each phase of the process. The project manager and OCA project coordinator must develop a process, schedule, and strategies that support these goals. It is important to note that the Design Excellence process requires advance planning and a time frame that allows for thoughtful coordination, analysis, and reviews.

Site Selection
- Contribute meaningfully to community development.
- Maximize the potential for architectural design excellence.
- Support effective sustainable design strategies.
- Meet current security standards.
FedBizOpps Announcement

- Describe the project and define project requirements accurately to attract highly qualified and talented lead designer and design firm submissions including emerging talent, women-owned, small, and small-disadvantaged businesses in addition to well-established firms.
- Specify a selection process that allows GSA, on behalf of the customer, to find a lead designer and A/E team capable of fulfilling the mandate for Design Excellence, which includes being on time and on budget.

The A/E Evaluation Board

- Appoint an A/E Evaluation Board comprised of individuals who understand the details of the project type and the design priorities of the particular project.
- Confirm that board members have the professional qualifications to make an informed A/E selection.

Selecting the Lead Designer and the Design Excellence A/E Team

- Recommend A/E teams that combine an outstanding lead designer with a track record for delivering superior quality.
- Shortlist lead designers and A/E teams that can creatively address the challenges of the project type.
- Rank the lead designers and A/E teams so GSA is negotiating with the best possible talent for the project.

Concept Development

- Convene at least two Design Excellence reviews with peers per project—one at the concept stage where three schemes are required and a second at a point in the development of the chosen concept so that the specifics of the design are evident at the same time that there are opportunities to make improvements.
• Be open to holding more than two Design Excellence peer reviews if needed.
• Periodically analyze the project budget and schedule to ascertain that goals in these two areas are being met, adjusting the design when necessary without compromising quality.
• Schedule the Commissioner’s concept review when the design concept has been finalized and there is professional confirmation that the project meets the Design Excellence goals.

Art in Architecture
• Appoint a professional Art in Architecture panel to select the artist(s).
• Initiate the artist selection process as soon as the A/E contract is in place.
• Select the artist(s) early enough to foster meaningful collaboration with architect so the art concept, along with the architectural design, can be presented at the Commissioner’s concept review.
• Convene peer workshops as needed to review art concepts as they are being developed.
Introduction

4.1 Criteria for Selecting the Best Project Site
Design Excellence and Site Selection Priorities

POLICIES AND PROCEDURES

4.0 Introduction
4.1 Criteria for Selecting the Best Project Site

RESOURCES

The Site Selection Desk Guide
Urban Development/Good Neighbor Program
http://civicsquare.gsa.gov/cong/
Design Excellence and Site Selection Priorities

4.0 Introduction

Site selection is not a formal part of the Design Excellence process. Site decisions, however, can have a profound impact on a project’s success. The following provides an overview of important Design Excellence site selection issues and useful resources.

4.1 Criteria for Selecting the Best Project Site

Site selection is a decision that affects the organization, massing, function, sustainability, efficiency, and aesthetics of a project. Security mandates and budget considerations are additional site selection issues. The goals in this decision should be to:

1. Contribute Meaningfully to Community Development
   A federal facility can be a catalyst in the growth and vitality of a neighborhood. It can provide public open space. It can revitalize an existing historic landmark. It can enhance the quality of a city’s urban environment.

2. Maximize the Potential for Architectural Design Excellence
   A site and its context should stimulate the creativity and imagination of the design team to produce a distinguished federal facility. The site should allow for the development of at least three distinct design options. Its size, shape, and physical characteristics such as slope or existing structures should not result in a design that compromises integrity, function, and performance or requires costly sitework that negatively impacts the budget.

3. Support Effective Sustainable Design Strategies
   GSA is required to have a “silver” LEED rating for all of its projects. Site-related decisions are important in achieving this goal. The site should allow designers to take advantage of the orientation to sun and wind. It should be in areas with existing infrastructure and be near alternative means of transportation. It should minimize environmental problems.
4 Meet Current Security Standards

Setbacks and other aspects of security such as vehicular access and parking are inherently linked to site selection. Sites should allow for appropriate perimeter security without isolating a building from its surroundings or making it a fortress. Federal facilities should be both open and secure, welcoming the public at the same time that they protect those who work and use these buildings.
Resources

These are valuable site selection resources:

*The Site Selection Desk Guide, GSA Office of the Chief Architect, 2003*
A complete compendium of the issues and processes related to site selection. The guide includes a discussion of technical issues and offers an extensive list of criteria essential to shortlisting and evaluating site options. It also contains a directory of professional organizations that may be useful contacts in the site selection process. Documents related to site selection are included in *The Site Section Desk Guide*. There are no formal Design Excellence site selection documents.

**Urban Development/Good Neighbor Program**
A program managed in the Office of the Chief Architect to articulate urban design excellence principles and facilitate and demonstrate urban design excellence in GSA projects. Contact the Office of the Chief Architect at 202.501.1888.

http://civicsquare.gsa.gov/cvsq/
A comprehensive web-based database managed by the Urban Development/Good Neighbor program. The site provides GSA staff with searchable project, image, and document databases on site selection, design, management, and other issues that impact local context. Project information presents site selection processes that successfully involved local stakeholders. Documents include sample site selection agreements between GSA and local municipalities, various land agreements, and a growing collection of solicitation documents and strategies for design and site selection related to lease construction projects.
Introduction

5.1 Articulate Design Excellence Goals

5.2 Describe the Project Accurately

5.3 Select Appropriate Design Excellence Process

5.4 Portfolio Requirements

5.5 FedBizOpps Announcement

Pre-Posting Review

5.6 Pre-Submittal Meeting

5.7 Office of the Chief Architect

Customer Meeting

5.8 The Peer Connection

FedBizOpps Templates

New Construction

Border Station

Modernization

Modernization of an Historic Structure

Limited Scope

Standard Form 330

Pre-Submittal Meeting Agenda

Pre-Submittal Meeting Packet

Policies and Procedures Resources and Sample Documents

FedBizOpps

Defining and Announcing Design Excellence Opportunities
FedBizOpps
Defining and Announcing Design Excellence Opportunities

5.0 Introduction

The FedBizOpps announcement is a critical element of the Design Excellence program. It is the transition from planning to project execution. It is the vehicle for inviting design professionals to compete for GSA projects. And perhaps most importantly from a project management perspective, it outlines all the stages in the A/E selection process and the criteria used to evaluate Stage I portfolio submissions.

Because it defines so many essential steps, it is crucial that it be thoughtfully developed and carefully written. FedBizOpps announcements vary subtly by project type and the stages used in the selection process. Templates are included in this publication for the language and information appropriate to five project types:

- New Construction
- Border Station
- Modernization
- Modernization of an Historic Structure
- Limited Scope

With respect to the elements important to all announcements, these are highlighted in the paragraphs that follow. In addition, the chart on the next page offers an overview of the steps and options in this phase of Design Excellence.
Defining and Announcing Design Excellence Opportunities

**DESIGN EXCELLENCE STEPS**

1. Draft the FedBizOpps Announcement
2. Submit FedBizOpps Draft to OCA Project Coordinator for Review
3. Post FedBizOpps Announcement
4. OCA Center for Design Excellence and the Arts Selects the National Peer for the A/E Evaluation Board
5. Hold Pre-submittal Meeting
6. Hold OCA Customer Meeting

**DESIGN EXCELLENCE OBJECTIVES**

- Articulate Design Excellence Goals
- Describe the Project Accurately
- Determine the Lead Designer-A/E Team Selection Process
- Appoint the Most Highly Qualified National Peer Possible
- Encourage Submissions from New and Emerging Talent as Well as Established Firms
5.1 Articulate Design Excellence Goals

FedBizOpps must identify each prospectus-level project as a Design Excellence opportunity. This is the language that introduces every Design Excellence FedBizOpps announcement:

Continuing a legacy of outstanding public architecture, the General Services Administration (GSA) Design Excellence Program seeks to commission our nation’s most talented designers and artists to design federal buildings of outstanding quality and value. These projects are to demonstrate the value of true integrated design that balances aesthetics, cost, constructability, and reliability; create environmentally responsible and superior workplaces for civilian federal employees; and give contemporary form and meaning to our democratic values.

In this context, GSA announces an opportunity for Design Excellence in public architecture for .... (The text continues with language specific to each project—please refer to individual FedBizOpps templates for the complete announcement language.)

The exception to a Design Excellence FedBizOpps announcement—granted after consulting with OCA—might be projects that are strictly systems upgrades, but even these may, on occasion, present a Design Excellence opportunity.

5.2 Describe the Project Accurately

FedBizOpps announcements must accurately describe the nature of the project:

• Stand alone new construction is easily summarized with a brief description of the site, client, program, and specific design objectives.
• Additions are more complex as they may require a blend of new work, preservation, and renovation. The FedBizOpps announcement must accurately outline this mix.

• Modernizations are the most challenging. The description must distinguish and suggest the balance among architectural work, preservation, interior design, and systems upgrades. Unless a project is overwhelmingly an engineering effort, it must be made clear that the architect is to be responsible for project management and oversight, even if architectural design is a smaller part of the scope of work.

The accuracy of these descriptions is critical as they are used by professionals to identify the appropriate lead designer and A/E team members. They also help the Office of the Chief Architect Center for Design Excellence and the Arts select the most qualified peers for the lead designer-A/E team selection process and concept development peer reviews.

5.3 Select the Appropriate Design Excellence Process

In consultation with the Office of the Chief Architect, regions must select one of three A/E selection processes:

• Two-Stage—Portfolio evaluations followed by Stage II submissions and lead designer-A/E team interviews—This is the norm, the most common process. It can be used for new construction, modernization, and preservation projects. The portfolio in Stage I provides an overview of the lead designer’s and design firm’s philosophy and design approach, while the submissions and interviews in Stage II give the A/E Evaluation Board information on the design teams, how they are organized, how they work with clients, and the lead designer’s priorities and strategies for addressing the project.
• **Two-Stage plus Charrette**—Portfolio evaluations followed by Stage II submissions, lead designer-A/E team interviews, and a charrette—This process adds a one-day charrette immediately following lead designer-A/E team interviews. (The charrette is an opportunity for each shortlisted lead designer-A/E team to prepare a design vision.) It provides a more specific sense of each lead designer-A/E team's design approach and priorities. The additional time and cost is minimal. A small fee for service paid to each participating team.

The one caveat is to make it clear to the A/E Selection Board that this additional step is not about selecting a project design. It is to reveal more information helpful to the selection of a lead designer and a design team—how these people identify and respond to design priorities, what they emphasize as their creative focus, and how they communicate strategies and ideas.

Charrettes are organized and managed by the Office of the Chief Architect Center for Design Excellence and the Arts. Project managers need to alert the Center at least two months in advance of any planned charrette so that the Center can hire a charrette advisor. The advisor will then work with the Center to select an appropriate charrette site and write the charrette program and rules. The Center will also select three peers as to serve as a jury to evaluate the charrette results.

• **Three-Stage**—Portfolio evaluations followed by Stage II submissions and lead designer-A/E team interviews followed, in turn, by a 30-day vision competition—In this process, the Stage II submissions and lead designer-A/E team interviews are the basis for selecting and inviting an even smaller shortlist of lead designer-A/E teams to participate in a vision competition. Selected lead designer-A/E teams are given an extensive program and a minimum of 30 days to prepare a design vision for the project.
This approach adds to both schedule and cost. The Office of the Chief Architect Center for Design Excellence and the Arts needs to hire a competition advisor and invite peer jurors to evaluate submissions. To allow adequate time to write a program and rules and coordinate schedules, this process begins at least two months in advance of the competition. Each lead designer-A/E team has 30 days to develop its ideas, at which point, the jury evaluates the submissions and gives a report to the A/E Evaluation Board.

As in the case of charrettes, the A/E Evaluation Board must understand that the competition is not being used to select a project design but rather to evaluate potential lead designers and their design teams, enabling GSA to understand in greater depth each lead designer-A/E team's design approach and its interpretation of a project's design priorities. In addition, to help avoid impressive but unrealistically expensive schemes, competition submissions must include a confirmation that the construction cost of each design is within the project budget.

There are benefits to this selection process. It generates a rich spectrum of design options and ideas. It is a public confirmation of GSA's commitment to Design Excellence, and it brings national attention to the importance of architecture as an expression of our democracy and its institutions. These are worthwhile objectives.

Whatever process is chosen, it is critical that the FedBizOpps announcement accurately describe the process and decision-making criteria to avoid adverse consequences and unnecessary delays.
5.4 Portfolio Requirements

The FedBizOpps announcement must also clarify Stage I portfolio requirements. These are key aspects of this submission:

- Stage I portfolios should be no more than 1/4” thick.

- If the Lead Designer is an individual, then the portfolio must include up to three completed projects done by the lead designer over the past ten years (each project should identify his or her specific role) and up to five completed projects done by his or her A/E firm over the past ten years. Each example must include the required images and text subject to the page limitations noted in the FedBizOpps announcement. The portfolio must also include a three-page lead designer profile (noting such facts as education, professional experience, design recognitions, and areas of responsibility) and a two-page statement of the lead designer’s philosophy and design intent that incorporates an understanding of the design issues for the proposed project and a philosophy for approaching the project.

- If the lead designer is a team (this is common in modernization projects), then the portfolio must include a limit of two completed projects per discipline done over the past ten years by each of the lead designers on the team and, representing the A/E firms, a selection of up to five additional completed projects done over the past ten years. Beyond adhering to the image and text limitations noted in the FedBizOpps announcement, the portfolio must also include a three-page lead designer profile that summarizes the backgrounds of all team members and a two-page philosophy and design intent statement that represents the perspective of the team as a whole.

- Detailed Stage I selection criteria should be noted and a summary of the entire selection process (two-stage, two-stage plus charrette, or three-stage) should be included in the FedBizOpps announcement.
As noted earlier, this chapter’s Resources and Sample Documents section includes templates of five typical FedBizOpps announcements:

- New Construction
- Border Station
- Modernization
- Modernization of an Historic Structure
- Limited Scope

### 5.5 FedBizOpps Announcement Pre-Posting Review

Once the project manager has finalized the FedBizOpps announcement, it must be sent to the OCA project coordinator prior to posting for a final review. This review will be handled in a timely manner.

### 5.6 Pre-Submittal Meeting

It is useful to convene a pre-submittal meeting for private-sector professionals interested in a particular project. The place and time of this meeting may be included in the FedBizOpps announcement. The contracting officer runs this meeting with the participation of the project manager. The purpose is to clarify the Design Excellence process, the application process, and the nature of the project. At the meeting, it should be stressed that the lead designer can be an individual or a collaboration among individuals. This overview is also an opportunity to highlight Standard Form 330, which, as of June 8, 2004, replaces Standard Forms 254 and 255. A typical agenda, pre-submittal packet, and Standard Form 330 are in the Resources and Sample Documents at the end of this chapter.
5.7 Office of the Chief Architect Customer Meeting

The project manager must contact the Office of the Chief Architect to arrange for an OCA representative to meet with the customer as soon as the project is announced. This meeting is an opportunity to provide an overview of the Design Excellence Program, share the FedBizOpps announcement, and explain how the Design Excellence process responds to customer needs. Such a conversation can be supported with publications on Design Excellence projects and a copy of *Design Excellence: Policies and Procedures*. The goal is to increase customer understanding of Design Excellence and develop an effective working relationship. The PBS Office of Customer Service should be notified of the time and place once this meeting is scheduled.

5.8 The Peer Connection

At least 30 days before the Stage I portfolio review is to take place, the project manager must contact the Office of the Chief Architect Center for Design Excellence and the Arts to arrange for national peer participation. In addition, to make sure the most qualified peer is selected as a member of the A/E Selection Board, a project profile is required. This should include the project budget and size, type of project (new construction, border station, modernization, preservation, limited scope) an expanded project description, and an overview of the project’s urban context.
Resources and Sample Documents

Sample Documents

Many sample documents are available as on-line Word files—go to:

http://insite.pbs.gsa.gov/PM/PMB/Design_Excellence_and_the_Arts

These Word documents can be used as templates by entering the requested information, shown as **COLORED BOLD TEXT IN CAPS**, and/or selecting and deleting other appropriate text, which generally have instructions in **COLORED BOLD CAPS**, with narrative options noted in non-bold colored text. Once the appropriate edits are complete, final documents can be high-lighted and reformatted entirely in black text.

**FEDBIZOPPS TEMPLATES**

New Construction
Border Station
Modernization
Modernization of an Historic Structure
Limited Scope

Standard Form 330
Pre-Submittal Meeting Agenda
Pre-Submittal Meeting Packet
FedBizOpps
Defining and Announcing Design Excellence Opportunities

FedBizOpps Announcement Templates

**BASIC FACTS**
These files are intended to help you quickly prepare a FedBizOpps (FBO) announcement to solicit a lead designer and A/E team for your project. If you have any questions, please consult the *Design Excellence: Policies and Procedures* or contact the project coordinator in the Office of the Chief Architect. You may also contact the director of the Office of the Chief Architect Center for Design Excellence and the Arts.

These standard FedBizOpps announcements have been developed to make it easier for lead designers and A/E teams to go after GSA projects. Because firms pursue projects around the country, it is important that our announcements be as uniform as possible to ensure national coherence. Since the manpower and reproduction costs necessary to prepare submission materials can be very expensive for lead designers and A/E teams pursuing our projects, it is important for us to keep that in mind in preparing a solicitation announcement.

**HOW TO USE THESE DOCUMENTS**
Much of any FedBizOpps announcement is standard boilerplate that should remain constant from project to project. This “standard” text appears in black. Where project-specific information is called for, the requested data appears in color. A description of what specifically needs to be included is provided along with an occasional example of how the text might read. The goal is to make this document as simple as possible to complete. It is also intended to facilitate review of this announcement by the Office of the Chief Architect. Please keep all changes confined to the red areas. All new, project-specific text should remain in red so that it is easily identifiable.
WHAT TO DO WHEN YOU ARE DONE

When you have modified the document and the project manager and region are satisfied with it, it should be forwarded to the Office of the Chief Architect project coordinator for review. Once OCA has reviewed it and any necessary changes have been made, it may be submitted to FedBizOpps by the contracting officer.

ORGANIZING THE EVALUATION BOARD FOR YOUR A/E SELECTION

Please remember to contact the director of the Center for Design Excellence and the Arts in the Office of the Chief Architect (202.501.1888) at least a month before you would like to schedule your Stage I review to request an OCA peer and a national peer for your A/E Evaluation Board. In accord with national Design Excellence procedures and the related procurement regulations, the A/E Evaluation Board shall consist of five professionals: a Design Excellence peer from the private sector, a GSA regional architect, a GSA regional engineer, a representative with a design and procurement background from the client agency or designated tenant, and a design professional from the Office of the Chief Architect. Project managers may not sit on the A/E Evaluation Board for their own projects. The Chief Architect shall concur on all appointments to the A/E Evaluation Board.
NEW CONSTRUCTION PROJECT
GSA Design Excellence Solicitation for Lead Design Architect
C-Architect-Engineer Services Solicitation # INSERT SOLICITATION NUMBER

Region: INSERT REGION
City: INSERT CITY
State: INSERT STATE
Contracting Officer: INSERT CONTRACTING OFFICER
Phone Number: INSERT PHONE NUMBER

PROJECT: INSERT PROJECT NAME, CITY, STATE
BUILDING TYPE: INSERT PROJECT TYPE—EXAMPLE: Courthouse, Federal Office Building
CLIENT AGENCY: INSERT NAME(S) OF PRIMARY TENANT OR AGENCIES
SIZE: INSERT GROSS SQUARE FOOTAGE OF PROJECT
PARKING SPACES: INSERT NUMBER OF INDOOR/OUTDOOR SPACES
BUDGET: INSERT ESTIMATED CONSTRUCTION COST AT AWARD OR RANGE
FUNDING: Funds Are Not Currently Available
GEOGRAPHIC LIMITATION: INSERT LIMITS BY RADIUS, STATE, OR OTHER CRITERIA
SMALL BUSINESS SET ASIDE: INSERT PERCENTAGE

Continuing a legacy of outstanding public architecture, the General Services Administration (GSA) Design Excellence Program seeks to commission our nation’s most talented designers and artists to design federal buildings of outstanding quality and value. These projects are to demonstrate the value of true integrated design that balances aesthetics, cost, constructability, and reliability; create environmentally responsible and superior workplaces for civilian federal employees; and give contemporary form and meaning to our democratic values.

In this context, GSA announces an opportunity for Design Excellence in public architecture for performance of architectural/engineering design in accordance with GSA quality standards and requirements. As required by law, all facilities will meet federal energy goals and security requirements and the facility will be designed in metric units.

All projects will be LEED certified.

See the attached Word document for the full solicitation. THE TEXT UP TO THIS POINT SHOULD BE ENTERED INTO FEDBIZZOPS. A WORD DOCUMENT THAT INCLUDES THIS INTRODUCTORY TEXT AND THE TEXT THAT FOLLOWS SHOULD BE ATTACHED TO THE FEDBIZZOPS ANNOUNCEMENT.
NEW CONSTRUCTION

PROJECT DESCRIPTION
The project is a new INSERT BRIEF DESCRIPTION OF THE PROJECT. The proposed site is INSERT LOCATION AND BRIEF DESCRIPTION OF THE SITE OR DELINEATED AREA. This new project will be INSERT A BRIEF DESCRIPTION OF THE GOAL OR INTENTION OF THE PROJECT—EXAMPLE: an anchor in the neighborhood and should make a distinct architectural statement that is responsive to INSERT A DESCRIPTION OF ARCHITECTURAL OR URBAN DESIGN GOALS—EXAMPLE: overall urban design quality and life of the burgeoning mixed-use neighborhood. INSERT IF APPLICABLE A BRIEF DESCRIPTION OF THE PROJECT DELIVERY METHOD—EXAMPLE: CMc, traditional design-bid-build.

SCOPE OF WORK
The scope of professional services will require at a minimum: professional architectural, landscape architectural, engineering, interior design, and related consulting services for INSERT SCOPE OF WORK—EXAMPLE: concept design documents, design development documents, metric construction documents, specifications, cost estimates, value engineering services, computer-aided design and drafting (CADD), and post-construction contract services (PCCS) for INSERT TYPE OF FACILITY that includes INSERT SCOPE OF DESIGN WORK—EXAMPLE: the construction of a new building and related systems, a parking structure, and site development. The project is also to include GSA design standards for secure facilities; conformance to the P100 (Facility Standards for Public Buildings), including LEED certification; and customer agency requirements.

SELECTION PROCESS
This is a request for qualifications (RFQ) of A/E firms/lead designers interested in contracting for this work. The A/E firm as used in this RFQ means an individual, firm, partnership, corporation, association, or other legal entity permitted by law to practice the profession of architecture or engineering that will have contractual responsibility for the project design. The lead designer is the individual or the team of designers who will have primary responsibility to develop the concept and the project design. The lead designer will also be involved in commissioning an artist or artists for this project and in assisting with the successful integration of works of arts into the architectural design.

A/E firms are advised that at least 35% of the level of contract effort must be performed in the INSERT CITY, STATE, OR RADIUS in which the project is located. The A/E firm will address the contractual relationship with the lead designer and project team in Stage II. INSERT IF NEEDED: At that time, the following specialty consultants will be required: LIST SPECIALTY CONSULTANTS.

INCLUDE THE APPROPRIATE PARAGRAPH:
The A/E selection will be completed in two stages as follows: In Stage I, interested lead designers and associated A/E firms will submit portfolios of accomplishment that establish the design capabilities of the lead designer and design firm. In Stage II,
shortlisted lead designer-A/E teams will be interviewed if needed: and asked to participate in a design charrette.

OR

The A/E selection will be completed in three stages as follows: In Stage I, interested lead designers and associated A/E firms will submit portfolios of accomplishment that establish the design capabilities of the lead designer and design firm. In Stage II, shortlisted lead designer-A/E teams will be interviewed. In Stage III, an even smaller group of shortlisted lead designer-A/E teams will be invited to participate in a vision competition.

Stage I

All documentation will be in an 8 1/2” x 11” format. The assembled content for the Stage I portfolio should be no more than 1/4 inch thick. Submissions may be double-sided where feasible. The portfolio should include the following: a cover letter referencing the FedBizOpps announcement and briefly describing the firm and its location, organizational makeup, and noteworthy accomplishments; Standard Form 330 Architect Engineer Qualifications Part II; and responses to the submission requirements and evaluation criteria listed below. An A/E Evaluation Board consisting of a private sector peer and representatives of the client and GSA will evaluate the submissions. The board will establish a shortlist of three to six firms.

Identification of team members, other than the lead designer(s), is not required at this stage. Consultant and “production firm” (if different from the design firm) information should not be included in the Stage I portfolio.

Submission Requirements And Evaluation Criteria:

(1) PAST PERFORMANCE ON DESIGN (35%): The A/E firm(s) will submit a portfolio of not more than five projects completed in the last ten years (maximum of five pages per project). The narrative shall address the design approach with salient features for each project and discuss how the client’s program, functional, image, mission, economic, schedule, and operational objectives were satisfied by the overall design/planning solution. It should comment on the relevance of submitted projects to the GSA project, including any special issues to be addressed—example: sustainability, the urban design strategy, and workplace design. This section of the submission should include tangible evidence such as certificates, awards, peer recognition, etc., demonstrating design excellence, and provide a client reference contact for each project, including name, title, address, email, phone, and fax numbers. A representative floor plan, a site plan, a building section, or other appropriate drawing, and a minimum of two photographs must be included for each project.

(2) PHILOSOPHY AND DESIGN INTENT (25%): In the lead designer’s words (maximum of two pages), as related to this project, state: the parameters of an overall design philosophy; his/her approach to the challenge of public architecture
and related issues; parameters that may apply in creating \textbf{INSERT DESCRIPTION OF PROJECT TYPE OR ISSUES—EXAMPLE: a courthouse or a federal office building or an attractive and productive workplace}; and commitment to integrated and sustainable design.

(3) \textbf{LEAD DESIGNER PROFILE (15%)}: Submit a biographical sketch (maximum of three pages) including education, professional experience, recognition for design efforts inclusive of the portfolio examples. Identify and describe areas of responsibility and commitment to each project.

(4) \textbf{LEAD DESIGNER PORTFOLIO (25%)}: Submit a portfolio representative of the lead designer’s ability to provide design excellence. Address his or her participation in each project. If a single designer, submit a portfolio of up to three projects completed in the last ten years (maximum of five pages per project). If the lead designer is a team, submit graphics and a description of up to two projects from each lead designer or lead design discipline. The narrative shall address the design philosophy with salient features for each project and discuss how the client’s program, functional, image, mission, economic, schedule, and operations and maintenance objectives were satisfied by the overall design/planning solution. Include tangible evidence such as certificates, awards, peer recognition, etc., demonstrating design excellence. Where there is duplication with criteria (1) Past Performance on Design, the lead designer shall address his or her participation in the project.

\textbf{Stage II}

The shortlisted lead designers and associated A/E firms will be notified and asked to submit more detailed information indicating each member of the design team, including all outside consultants. Sufficient time will be provided for the lead designer and associated A/E design firm to establish its team. The firms will be required to complete Standard Form 330 Architect Engineer Qualifications Parts I and II that reflect the entire design team. The government will establish the detailed evaluation criteria and the date that these submittals are due and provide the selection criteria for the interviews along with the Stage I shortlist announcement. \textbf{INSERT NOTICE OF SMALL BUSINESS NETWORKING SESSION IF PLANNED.}

The board will interview each team. Candidates should be prepared to discuss all aspects of the criteria indicated above and evaluation criteria as established for Stage II, and demonstrate their ability to fulfill all project requirements. Emphasis will be placed on the lead designer-A/E team’s understanding of the unique aspects of the project, their design philosophy, project management process, and quality assurance plan. \textbf{END THIS PARAGRAPH WITH ONE OF THREE CHOICES:}

\textbf{INSERT IF THERE IS NO CHARRETTE OR STAGE III VISION COMPETITION, USE THIS TEXT:} Responses to the evaluation criteria and interview questions will be used to rank the lead designer-A/E teams.

\textbf{OR}
IF THERE IS A CHARRETTE, USE THIS TEXT: Lead designers and associated A/E firms selected to participate in Stage II will be further evaluated by an anonymous, one-day design charrette judged by a jury of independent design professionals. The purpose of the design charrette is to further evaluate the lead designer-A/E team qualifications for the project. The “vision” developed in the charrette will weigh substantially in the lead designer-A/E team ranking. The submitted charrette concepts become the property of the government. The charrette proposals will be used in conjunction with Stage II interview rankings in the final evaluation of lead designer-A/E teams.

OR

IF THERE IS A STAGE III VISION COMPETITION, END THIS PARAGRAPH WITH THIS TEXT: Responses to the evaluation criteria and interview questions will be used to identify an even smaller shortlist of lead designer-A/E teams to be invited to participate in a Stage III vision competition.

INSERT IF THERE IS A STAGE III VISION COMPETITION:

Stage III
Lead designer-A/E teams selected to participate in Stage III will be further evaluated by an anonymous vision competition judged by a jury of independent design professionals. The purpose of the vision competition, for which lead designer-A/E teams will receive a program and have 30 days to develop a submission and cost estimate, is to further evaluate the lead designer-A/E teams qualifications for the project. The “vision” developed in this stage will weigh substantially in the lead designer-A/E team ranking. The submitted vision competition concepts become the property of the government. The vision competition proposals will be used in conjunction with Stage II interview rankings in the final evaluation of lead designer-A/E teams.

IMPORTANT INFORMATION FOR STAGE I SUBMITTALS
Firms having the capabilities to perform the services described in this announcement are invited to respond by submitting Standard Form 330 Architect Engineer Qualifications Part II, which must not be dated more than twelve (12) months before the date of this synopsis along with letter of interest and the portfolio TO:

Contracting Officer: INSERT NAME
Delivery Address: INSERT ADDRESS
Phone number: INSERT PHONE NUMBER

ALL SUBMISSIONS ARE DUE by 3:00PM local time on INSERT DUE DATE OF THIS NOTICE.

A total of INSERT NUMBER OF COPIES REQUIRED copies should be submitted. The following information must be on the outside of the sealed envelope 1) solicitation number/title, 2) due date, 3) closing Time. Late responses are subject to FAR 52.214-7.
INSERT SMALL BUSINESS OR OTHER PROCUREMENT REQUIREMENTS.

THIS TEXT IS TYPICAL FOR PROCUREMENTS OPEN TO SMALL AND LARGE BUSINESSES: This procurement is being made under the Small Business Competitiveness Demonstration Program (FAR 52.219-19). This procurement is open to small and large business concerns. Before award of the contract, the A/E (if not a small business of $12,000,000 gross receipts over a three (3) year period or no more than $4,000,000 gross average receipts per year for the same time frame) shall be required to present an acceptable Small Business and Small Disadvantaged Business Subcontracting Plan in accordance with Public Law 95-507. Small, women-owned, and small disadvantaged firms are strongly encouraged to participate as prime contractors or as members of joint ventures with other small businesses. All interested large business firms are reminded that the successful firm will be expected to place subcontracts to the maximum practical extent with small and disadvantaged firms as part of their original submitted teams (Stage II).

OR

THIS TEXT IS TYPICAL FOR PROCUREMENTS LIMITED TO SMALL BUSINESSES: This procurement is being made under the Small Business Competitiveness Demonstration Program (FAR 52.219-19). This procurement is a set-aside and restricted to small businesses. The NAICS Code is 541310; the size standard is no more than $12,000,000 gross receipts over a three (3) year period or no more than $4,000,000 gross average receipts per year for the same time frame. Small, women-owned, and small disadvantaged firms are strongly encouraged to participate as prime contractors or as members of joint ventures with other small businesses.

Contract will be procured under the Brooks A/E Act and FAR Part 36. The government will not allow payment for travel, living expense, computer time or hookups for the prime or the consultants during the selection process. This is not a request for proposals.
NEW CONSTRUCTION PROJECT – BORDER STATION
GSA Design Excellence Solicitation for Lead Design Architect
C-Architect-Engineer Services Solicitation # INSERT SOLICITATION NUMBER

Region: INSERT REGION
City: INSERT CITY
State: INSERT STATE
Contracting Officer: INSERT CONTRACTING OFFICER
Phone Number: INSERT PHONE NUMBER

PROJECT: INSERT PROJECT NAME, CITY, STATE
PROJECT TYPE: NEW CONSTRUCTION OR EXPANSION/RENOVATION
CLIENT AGENCY: INSERT NAME OF PRIMARY TENANT OR AGENCIES
SIZE: INSERT ENCLOSED GROSS SQUARE FOOTAGE—NUMBER OF COMMERCIAL PRIMARY INSPECTION STATIONS—NUMBER OF NON-COMMERCIAL PRIMARY INSPECTION STATIONS
BUDGET: INSERT ESTIMATED CONSTRUCTION COST AT AWARD OR RANGE
INSERT IF APPLICABLE:
FUNDING: Funds Are Not Currently Available
GEOGRAPHIC LIMITATION: INSERT LIMITS BY RADIUS, STATE, OR OTHER CRITERIA
INSERT IF APPLICABLE:
SMALL BUSINESS SET ASIDE: INSERT PERCENTAGE

Continuing a legacy of outstanding public architecture, the General Services Administration (GSA) Design Excellence Program seeks to commission our nation’s most talented designers and artists to design federal buildings of outstanding quality and value. These projects are to demonstrate the value of true integrated design that balances aesthetics, cost, constructability, and reliability; create environmentally responsible and superior workplaces for civilian federal employees; and give contemporary form and meaning to our democratic values.

In this context, GSA announces an opportunity for Design Excellence in public architecture for performance of architectural/engineering design in accordance with GSA quality standards and requirements. As required by law, all facilities will meet federal energy goals and security requirements and the facility will be designed in metric units. All projects will be LEED certified.

See the attached Word document for the full solicitation. THE TEXT UP TO THIS POINT SHOULD BE ENTERED INTO FEDBIZZOPS. A WORD DOCUMENT THAT INCLUDES THIS INTRODUCTORY TEXT AND THE TEXT THAT FOLLOWS SHOULD BE ATTACHED TO THE FEDBIZZOPS ANNOUNCEMENT.
PROJECT DESCRIPTION
The project is a new land port of entry on the INSERT: northern OR southern border in INSERT STATE. The proposed site is INSERT LOCATION AND BRIEF DESCRIPTION OF THE SITE. This new project will be a gateway to our country and will INSERT A BRIEF DESCRIPTION OF THE GOAL OR INTENTION OF THE PROJECT—EXAMPLE: transform an obsolete border facility into a state-of-the-art commercial port of entry. It should make a distinct architectural statement that is responsive to the efficient movement of trade and commerce, the security requirements of law enforcement agencies, and the welcoming of visitors and citizens to the United States of America. INSERT IF APPLICABLE A BRIEF DESCRIPTION OF THE PROJECT DELIVERY METHOD—EXAMPLE: CMc, traditional design-bid-build.

SCOPE OF WORK
The scope of professional services will require at a minimum: professional architectural, landscape architectural, engineering, traffic engineering, interior design, and related consulting services for INSERT SCOPE OF WORK—EXAMPLE: concept design documents, design development documents, metric construction documents, specifications, cost estimates, value engineering services, computer-aided design and drafting (CADD), and post-construction contract services (PCCS). The scope of design work for the project includes INSERT SCOPE OF DESIGN WORK—EXAMPLE: the landscape design, construction of a new building and related systems, traffic engineering, and site development. The project is also to include GSA design standards for secure facilities; conformance to the P100 (Facility Standards for Public Buildings), including LEED certification; and customer agency requirements, including the Port of Entry Design Guide.

SELECTION PROCESS
This is a request for qualifications (RFQ) of A/E firms/lead designers interested in contracting for this work. The A/E firm as used in this RFQ means an individual, firm, partnership, corporation, association, or other legal entity permitted by law to practice the profession of architecture or engineering that will have contractual responsibility for the project design. The lead designer is the individual or the team of designers who will have primary responsibility to develop the concept and the project design. The lead designer will also be involved in commissioning an artist or artists for this project and in assisting with the successful integration of works of arts into the architectural design. A/E firms are advised that at least 35% of the level of contract effort must be performed in the INSERT CITY, STATE, OR RADIUS in which the project is located. The A/E firm will address the contractual relationship with the lead designer and project team in Stage II. INSERT IF NEEDED: At that time, the following specialty consultants will be required: LIST SPECIALTY CONSULTANTS.
The A/E selection will be completed in two stages as follows: In Stage I, interested lead designers and associated A/E firms will submit portfolios of accomplishment that establish the design capabilities of the lead designer and design firm. In Stage II, shortlisted lead designer-A/E teams will be interviewed and asked to participate in a design charrette.

OR

The A/E selection will be completed in three stages as follows: In Stage I, interested lead designers and associated A/E firms will submit portfolios of accomplishment that establish the design capabilities of the lead designer and design firm. In Stage II, shortlisted lead designer-A/E teams will be interviewed. In Stage III, an even smaller group of shortlisted lead designer-A/E teams will be invited to participate in a vision competition.

Stage I
All documentation will be in an 8 1/2" x 11" format. The assembled content for the Stage I portfolio should be no more than 1/4 inch thick. Submissions may be double-sided where feasible. The portfolio should include the following: a cover letter referencing the FedBizOpps announcement and briefly describing the firm and its location, organizational makeup, and noteworthy accomplishments; Standard Form 330 Architect Engineer Qualifications Part II; and responses to the submission requirements and evaluation criteria listed below. An A/E Evaluation Board consisting of a private sector peer and representatives of the client and GSA will evaluate the submissions. The board will establish a shortlist of three to six firms.

Identification of team members, other than the lead designer(s), is not required at this stage. Consultant and “production firm” (if different from the design firm) information should not be included in the Stage I portfolio.

Substitution Requirements And Evaluation Criteria:
1. Past Performance on Design (35%): The A/E firm(s) will submit a portfolio of not more than five projects completed in the last ten years (maximum of five pages per project). The narrative shall address the design approach with salient features for each project and discuss how the client’s program, functional, image, mission, economic, schedule, and operational objectives were satisfied by the overall design/planning solution. It should comment on the relevance of submitted projects to the GSA project, including any special issues to be addressed—example: remoteness, harsh climate, and phasing of a project that must be operational 24/7. This section of the submission should include tangible evidence such as certificates, awards, peer recognition, etc. demonstrating design excellence, and provide a client reference contact for each project, including name, title, address, email, phone, and fax numbers. A representative floor plan, a site plan, a building section, or other appropriate drawing, and a minimum of two photographs must be included for each project.
(2) PHILOSOPHY AND DESIGN INTENT (25%): In the lead designer’s words (maximum of two pages), as related to this project, state: the parameters of an overall design philosophy; his/her approach to the challenge of public architecture and related issues; parameters that may apply in creating a secure and welcoming state-of-the-art border facility and commitment to integrated and sustainable design.

(3) LEAD DESIGNER PROFILE (15%): Submit a biographical sketch (maximum of three pages) including education, professional experience, recognition for design efforts inclusive of the portfolio examples. Identify and describe areas of responsibility and commitment to each project.

(4) LEAD DESIGNER PORTFOLIO (25%): Submit a portfolio representative of the lead designer’s ability to provide design excellence. Address his or her participation in each project. If a single designer, submit a portfolio of up to three projects completed in the last ten years (maximum of five pages per project). If the lead designer is a team, submit graphics and a description of up to two projects from each lead designer or lead design discipline. The narrative shall address the design philosophy with salient features for each project and discuss how the client’s program, functional, image, mission, economic, schedule, and operations and maintenance objectives were satisfied by the overall design/planning solution. Include tangible evidence such as certificates, awards, peer recognition, etc., demonstrating design excellence. Where there is duplication with criteria (1) Past Performance on Design, the lead designer shall address his or her participation in the project.

Stage II
The shortlisted lead designers and associated A/E firms will be notified and asked to submit more detailed information indicating each member of the design team, including all outside consultants. Sufficient time will be provided for the lead designer and associated A/E design firm to establish its team. The firms will be required to complete Standard Form 330 Architect Engineer Qualifications Parts I and II that reflect the entire design team. The government will establish the detailed evaluation criteria and the date that these submittals are due and provide the selection criteria for the interviews along with the Stage I shortlist announcement. INSERT NOTICE OF SMALL BUSINESS NETWORKING SESSION IF PLANNED.

The board will interview each team. Candidates should be prepared to discuss all aspects of the criteria indicated above and evaluation criteria as established for Stage II, and demonstrate their ability to fulfill all project requirements. Emphasis will be placed on the lead designer-A/E team’s understanding of the unique aspects of the project, their design philosophy, project management process, and quality assurance plan. END THIS PARAGRAPH WITH ONE OF THREE CHOICES:

INSERT IF THERE IS NO CHARRETTE OR STAGE III VISION COMPETITION, USE THIS TEXT: Responses to the evaluation criteria and interview questions will be used to rank the lead Designer-A/E teams.
FedBizOpps
Defining and Announcing Design Excellence Opportunities

OR

IF THERE IS A CHARRETTE, USE THIS TEXT: Lead designers and associated A/E firms selected to participate in Stage II will be further evaluated by an anonymous, one-day design charrette judged by a jury of independent design professionals. The purpose of the design charrette is to further evaluate the lead designer-A/E teams qualifications for the project. The “vision” developed in the charrette will weigh substantially in the lead designer-A/E team ranking. The submitted charrette concepts become the property of the government. The charrette proposals will be used in conjunction with Stage II interview rankings in the final evaluation of lead designer-A/E teams.

OR

IF THERE IS A STAGE III VISION COMPETITION, END THIS PARAGRAPH WITH THIS TEXT: Responses to the evaluation criteria and interview questions will be used to identify an even smaller shortlist of lead designer-A/E teams to be invited to participate in a Stage III vision competition.

INSERT IF THERE IS A STAGE III VISION COMPETITION:

Stage III
Lead designer-A/E teams selected to participate in Stage III will be further evaluated by an anonymous vision competition judged by a jury of independent design professionals. The purpose of the vision competition, for which lead designer-A/E teams will receive a program and have 30 days to develop a submission and cost estimate, is to further evaluate the lead designer-A/E teams qualifications for the project. The “vision” developed in this stage will weigh substantially in the lead designer-A/E team ranking. The submitted vision competition concepts become the property of the government. The vision competition proposals will be used in conjunction with Stage II interview rankings in the final evaluation of lead designer-A/E teams.

IMPORTANT INFORMATION FOR STAGE I SUBMITTALS
Firms having the capabilities to perform the services described in this announcement are invited to respond by submitting Standard Form 330 Architect Engineer Qualifications Part II, which must not be dated more than twelve (12) months before the date of this synopsis along with letter of interest and the portfolio TO:

Contracting Officer: INSERT NAME
Delivery Address: INSERT ADDRESS
Phone number: INSERT PHONE NUMBER

ALL SUBMISSIONS ARE DUE by 3:00PM local time on INSERT DUE DATE OF THIS NOTICE.
A total of \textbf{INSERT NUMBER OF COPIES REQUIRED} copies should be submitted. The following information must be on the outside of the sealed envelope: 1) solicitation number/title, 2) due date, 3) closing time. Late responses are subject to FAR 52.214-7.

\textbf{INSERT SMALL BUSINESS OR OTHER PROCUREMENT REQUIREMENTS. THIS TEXT IS TYPICAL FOR PROCUREMENTS OPEN TO SMALL AND LARGE BUSINESSES:} This procurement is being made under the Small Business Competitiveness Demonstration Program (FAR 52.219-19). This procurement is open to small and large business concerns. Before award of the contract, the A/E (if not a small business of $12,000,000 gross receipts over a three (3) year period or no more than $4,000,000 gross average receipts per year for the same time frame) shall be required to present an acceptable Small Business and Small Disadvantaged Business Subcontracting Plan in accordance with Public Law 95-507. Small, women-owned, and small disadvantaged firms are strongly encouraged to participate as prime contractors or as members of joint ventures with other small businesses. All interested large business firms are reminded that the successful firm will be expected to place subcontracts to the maximum practical extent with small and disadvantaged firms as part of their original submitted teams (Stage II).

\textbf{OR}

\textbf{THIS TEXT IS TYPICAL FOR PROCUREMENTS LIMITED TO SMALL BUSINESSES:} This procurement is being made under the Small Business Competitiveness Demonstration Program (FAR 52.219-19). This procurement is a set-aside and restricted to small businesses. The NAICS Code is 541310; the size standard is no more than $12,000,000 gross receipts over a three (3) year period or no more than $4,000,000 gross average receipts per year for the same time frame. Small, women-owned, and small disadvantaged firms are strongly encouraged to participate as prime contractors or as members of joint ventures with other small businesses.

Contract will be procured under the Brooks A/E Act and FAR Part 36. The government will not allow payment for travel, living expense, computer time or hookups for the prime or the consultants during the selection process. This is not a request for proposals.
Continuing a legacy of outstanding public architecture, the General Services Administration (GSA) Design Excellence Program seeks to commission our nation’s most talented designers and architects to modernize our federal buildings and prepare them for the next 50 to 100 years of service. These projects are to demonstrate the value of true integrated design that balances aesthetics, cost, constructability, and reliability; create environmentally responsible and superior workplaces for civilian federal employees; and give contemporary form and meaning to our democratic values.

In this context, GSA announces an opportunity for Design Excellence in public architecture for performance of architectural/engineering Design in accordance with GSA quality standards and requirements. As required by law, all facilities will meet federal energy goals and security requirements. All projects will be LEED certified.

See the attached Word document for the full solicitation. **THE TEXT UP TO THIS POINT SHOULD BE ENTERED INTO FEDBIZZOPS. A WORD DOCUMENT THAT INCLUDES THIS INTRODUCTORY TEXT AND THE TEXT THAT FOLLOWS SHOULD BE ATTACHED TO THE FEDBIZZOPS ANNOUNCEMENT.**
PROJECT DESCRIPTION
The project is a [INSERT BRIEF DESCRIPTION OF THE PROJECT]. It is located [INSERT LOCATION AND BRIEF DESCRIPTION OF THE SITE]. This project will be [INSERT A BRIEF DESCRIPTION OF THE GOAL OR INTENTION OF THE PROJECT—EXAMPLE: a model workplace and sustainable design] and should make a distinct architectural statement that is responsive to the existing character of the building while [INSERT A DESCRIPTION OF ARCHITECTURAL OR URBAN DESIGN GOALS—EXAMPLE: supporting the quality and life of the neighborhood]. [INSERT IF APPLICABLE A BRIEF DESCRIPTION OF THE PROJECT DELIVERY METHOD—EXAMPLE: CMC, traditional design-bid-build].

SCOPE OF WORK
The scope of professional services will require at a minimum: professional architectural, engineering, interior design, landscape architecture, and related consulting services for [INSERT SCOPE OF WORK—EXAMPLE: concept design documents, design development documents, construction documents, specifications, cost estimates, value engineering services, computer-aided design and drafting (CADD), and post-construction contract services (PCCS)] for [INSERT TYPE OF FACILITY] that includes [INSERT SCOPE OF DESIGN WORK—EXAMPLE: the construction of a new interior and related systems and site development]. Space alterations include [DESCRIBE SPACE ALTERATIONS]. Add statement about any special conditions such as unique programmatic objectives and comments on building materials. The project is also to include GSA design standards for secure facilities; conformance to the P100 (Facility Standards for Public Buildings), including LEED certification; and customer agency requirements.

SELECTION PROCESS
This is a request for qualifications (RFQ) of A/E firms/lead designers interested in contracting for this work. [STATE IF BOTH A LEAD ARCHITECTURAL DESIGNER AND A LEAD ENGINEER DESIGNER ARE REQUIRED]. The A/E firm as used in this RFQ means an individual, firm, partnership, corporation, association, or other legal entity permitted by law to practice the profession of architecture or engineering that will have contractual responsibility for the project design. The lead designer is the individual or the team of designers who will have primary responsibility to develop the concept and the project design. [INSERT IF RELEVANT: The lead designer will also be involved in commissioning an artist or artists for this project and in assisting with the successful integration of works of arts into the architectural design].

A/E firms are advised that at least 35% of the level of contract effort must be performed in the [INSERT CITY, STATE, OR RADIUS] in which the project is located. The A/E firm will address the contractual relationship with the lead designer and project team in Stage II. [INSERT IF NEEDED: At that time, the following specialty consultants will be required: LIST SPECIALTY CONSULTANTS].
The A/E selection will be completed in two stages as follows: In Stage I, interested designers and associated A/E firms will submit portfolios of accomplishment that establish the design capabilities of the lead designer and design firm. In Stage II, shortlisted lead designer-A/E teams will be interviewed and asked to participate in a design charrette.

Stage I
All documentation will be in an 8 1/2" x 11" format. The assembled Stage I portfolio should be no more than 1/4 inch thick. Submissions may be double-sided where feasible. The portfolio should include the following: a cover letter referencing the FedBizOpps announcement and briefly describing the firm and its location, organizational makeup, and noteworthy accomplishments; Standard Form 330 Architect Engineer Qualifications Part II; and responses to the submission requirements and evaluation criteria listed below. An A/E Evaluation Board consisting of a private sector peer and representatives of the client and GSA will evaluate the submissions. The board will establish a shortlist of three to six firms.

Identification of team members, other than the lead designer(s), is not required at this stage. Consultant and “production firm” (if different from the design firm) information should not be included in the Stage I portfolio.

Submission Requirements And Evaluation Criteria:
(1) PAST PERFORMANCE ON DESIGN (35%): The A/E firm(s) will submit a portfolio of not more than five projects completed in the last ten years (maximum of five pages per project). The narrative shall address the design approach with salient features for each project and discuss how the client’s program, function, image, mission, economic, schedule, and operational objectives were satisfied by the overall design/planning solution. It should comment on the relevance of submitted projects to the GSA project, including sustainability, the urban design strategy, and workplace design. This section of the submission should include tangible evidence such as certificates, awards, peer recognition, etc. demonstrating design excellence, and provide a client reference contact for each project, including name, title, address, email, phone, and fax numbers. A representative floor plan, a site plan, a building section, or other appropriate drawing, and a minimum of two photographs must be included for each project.

(2) PHILOSOPHY AND DESIGN INTENT (25%): In the lead designer’s words (maximum of two pages), as related to this project, state: the parameters of an overall design philosophy; his/her approach to the challenge of public architecture and related issues; parameters that may apply in creating a courthouse OR a federal office building OR an attractive and productive workplace; and commitment to integrated and sustainable design.

(3) LEAD DESIGNER PROFILE (15%): Submit a biographical sketch (maximum of three pages) including education, professional experience, recognition for design efforts inclusive of the portfolio examples. Identify and describe areas of responsibility and commitment to each project.
(4) LEAD DESIGNER PORTFOLIO (25%): Submit a portfolio representative of the lead designer’s ability to provide design excellence. Address his or her participation in each project. If a single designer, submit a portfolio of up to three projects completed in the last ten years (maximum of five pages per project). If the lead designer is a team, submit graphics and a description of up to two projects from each lead designer or lead design discipline. The narrative shall address the design philosophy with salient features for each project and discuss how the client’s program, functional, image, mission, economic, schedule, and operations and maintenance objectives were satisfied by the overall design/planning solution. Include tangible evidence such as certificates, awards, peer recognition, etc., demonstrating design excellence. Where there is duplication with criteria (1) Past Performance on Design, the lead designer shall address his or her participation in the project.

Stage II
The shortlisted lead designers and associated A/E firms will be notified and asked to submit more detailed information indicating each member of the design team, including all outside consultants. Sufficient time will be provided for the lead designer and associated A/E design firm to establish its team. The firms will be required to complete Standard Form 330 Architect Engineer Qualifications Parts I and II that reflect the entire design team. The government will establish the detailed evaluation criteria and the date that these submittals are due and provide the selection criteria for the interviews along with the Stage I shortlist announcement. **INSERT NOTICE OF SMALL BUSINESS NETWORKING SESSION IF PLANNED.**

The board will interview each team. Candidates should be prepared to discuss all aspects of the criteria indicated above and evaluation criteria as established for Stage II, and demonstrate their ability to fulfill all project requirements. Emphasis will be placed on the lead designer-A/E team’s understanding of the unique aspects of the project, their design philosophy, project management process, and quality assurance plan. **END THIS PARAGRAPH WITH ONE OF TWO CHOICES:**

**INSERT IF THERE IS NO CHARRETTE, USE THIS TEXT:** Responses to the evaluation criteria and interview questions will be used to rank the Lead Designer-A/E Teams.

**OR**

**IF THERE IS A CHARRETTE, USE THIS TEXT:** Lead designers and associated A/E firms selected to participate in Stage II will be further evaluated by an anonymous, one-day design charrette judged by a jury of independent design professionals. The purpose of the design charrette is to further evaluate the lead designer-A/E teams qualifications for the project. The “vision” developed in the charrette will weigh substantially in the lead designer-A/E team ranking. The submitted charrette concepts become the property of the government. The charrette proposals will be used in conjunction with Stage II interview rankings in the final evaluation of lead designer-A/E teams.
IMPORTANT INFORMATION FOR STAGE I SUBMITTALS

Firms having the capabilities to perform the services described in this announcement are invited to respond by submitting Standard Form 330 Architect Engineer Qualifications Part II, which must not be dated more than twelve (12) months before the date of this synopsis along with letter of interest and the portfolio TO:

Contracting Officer: INSERT NAME
Delivery Address: INSERT ADDRESS
Phone number: INSERT PHONE NUMBER

ALL SUBMISSIONS ARE DUE by 3:00PM local time on INSERT DUE DATE OF THIS NOTICE.

A total of INSERT NUMBER OF COPIES REQUIRED copies should be submitted. The following information must be on the outside of the sealed envelope 1) solicitation number/title, 2) due date, 3) closing time. Late responses are subject to FAR 52.214-7.

THIS TEXT IS TYPICAL FOR PROCUREMENTS OPEN TO SMALL AND LARGE BUSINESSES:

This procurement is being made under the Small Business Competitiveness Demonstration Program (FAR 52.219-19). This procurement is open to small and large business concerns. Before award of the contract, the A/E (if not a small business of $12,000,000 gross receipts over a three (3) year period or no more than $4,000,000 gross average receipts per year for the same time frame) shall be required to present an acceptable Small Business and Small Disadvantaged Business Subcontracting Plan in accordance with Public Law 95-507. Small, women-owned, and small disadvantaged firms are strongly encouraged to participate as prime contractors or as members of joint ventures with other small businesses. All interested large business firms are reminded that the successful firm will be expected to place subcontracts to the maximum practical extent with small and disadvantaged firms as part of their original submitted teams (Stage II).

OR

THIS TEXT IS TYPICAL FOR PROCUREMENTS LIMITED TO SMALL BUSINESSES:

This procurement is being made under the Small Business Competitiveness Demonstration Program (FAR 52.219-19). This procurement is a set-aside and restricted to small businesses. The NAICS Code is 541310; the side standard is no more than $12,000,000 gross receipts over a three (3) year period or no more than $4,000,000 gross average receipts per year for the same time frame. Small, women-owned, and small disadvantaged firms are strongly encouraged to participate as prime contractors or as members of joint ventures with other small businesses.

Contract will be procured under the Brooks A/E Act and FAR Part 36. The government will not allow payment for travel, living expense, computer time or hookups for the prime or the consultants during the selection process. This is not a request for proposals.
Through the preservation and modernization of an historic federal building, this project continues the legacy of outstanding public architecture. In accord with this tradition, the General Services Administration (GSA) Design Excellence Program seeks to commission our nation’s most talented designers and artists to prepare our historic federal buildings for the next 50 to 100 years of service. These projects are to demonstrate the value of integrated design that balances historic significance with current needs; balances aesthetics, cost, constructability, and reliability; creates environmentally responsible and superior workplaces for civilian federal employees; and gives public expression to our democratic values.

In this context, GSA announces an opportunity for Design Excellence in public architecture for performance of architectural/engineering design in accordance with GSA quality standards and requirements. As required by law, all facilities will meet federal energy goals and security requirements. All projects will be LEED certified.

See the attached Word document for the full solicitation. THE TEXT UP TO THIS POINT SHOULD BE ENTERED INTO FEDBIZOPS. A WORD DOCUMENT
THAT INCLUDES THIS INTRODUCTORY TEXT AND THE TEXT THAT FOLLOWS SHOULD BE ATTACHED TO THE FED BizOpps ANNOUNCEMENT.

PROJECT DESCRIPTION
The project is a INSERT BRIEF DESCRIPTION OF THE PROJECT—EXAMPLE: a 1930s federal building by Cass Gilbert. It is located INSERT LOCATION AND BRIEF DESCRIPTION OF THE SITE. This project will be INSERT A BRIEF DESCRIPTION OF THE GOAL OR INTENTION OF THE PROJECT—EXAMPLE: a model workplace and example of successful preservation. The design will follow the Secretary of Interior’s Standards for Rehabilitating Historic Buildings and Building Preservation Plan (BPP) guidance, respecting the existing historic character of the building while accomplishing the project requirements to INSERT A DESCRIPTION OF ARCHITECTURAL OR URBAN DESIGN GOALS—EXAMPLE: maintain the integrity of the historic building at the same time that the design supports the needs of a modern workforce. INSERT IF APPLICABLE A BRIEF DESCRIPTION OF THE PROJECT DELIVERY METHOD—EXAMPLE: CMc, traditional design-bid-build.

SCOPE OF WORK
The scope of professional services will require at a minimum: professional architectural, landscape architectural, engineering, interior design, and related consulting services for INSERT SCOPE OF WORK—EXAMPLE: concept design documents, design development documents, construction documents, specifications, cost estimates, value engineering services, computer-aided design and drafting (CADD), and post-construction contract services (PCCS) for INSERT TYPE OF FACILITY that includes INSERT SCOPE OF DESIGN WORK—EXAMPLE: the construction of a new interior and related systems, restoration of historic materials, and site development. Space alterations include DESCRIBE SPACE ALTERATIONS. ADD STATEMENT ABOUT ANY SPECIAL CONDITIONS SUCH AS UNIQUE PROGRAMMATIC OBJECTIVES AND COMMENTS ON BUILDING MATERIALS. The project is also to include GSA design standards for secure facilities; conformance to the P100 (Facility Standards for Public Buildings), including LEED certification; and customer agency requirements.

This building is INSERT: listed OR eligible for the National Register of Historic Places. Each design submission must be approved by the Regional Historic Preservation Officer, who will coordinate external review by the State Historic Preservation Officer (SHPO) and Advisory Council on Historic Preservation, in compliance with the National Historic Preservation Act, Section 106. Design submissions will include a preservation report with captioned photographs and relevant design details identifying preservation design issues and solutions as they are developed. Every effort will be made to avoid adversely affecting original materials and design in the buildings restoration or preservation zones identified in the Building Preservation Plan. Alteration or removal of original materials and design requires special justification and a Memorandum of Agreement with the SHPO.
SELECTION PROCESS
This is a request for qualifications (RFQ) of A/E firms/lead designers interested in contracting for this work. The A/E firm as used in this RFQ means an individual, firm, partnership, corporation, association, or other legal entity permitted by law to practice the profession of architecture or engineering that will have contractual responsibility for the project design. The lead designer is the individual or the team of designers who will have primary responsibility to develop the concept and the project design.

INSERT IF RELEVANT: The lead designer will also be involved in the Art in Architecture program for this project, which will include STATE IF COMMISSIONING NEW WORK AND/OR CONSERVING EXISTING ART WORK.

A/E firms are advised that at least 35% of the level of contract effort must be performed in the INSERT CITY, STATE, OR RADIUS in which the project is located. The A/E firm will address the contractual relationship with the lead designer and project team in Stage II, INSERT IF NEEDED: At that time, the following specialty consultants will be required: LIST SPECIALTY CONSULTANTS.

The A/E selection will be completed in two stages as follows: In Stage I, interested lead designers and associated A/E firms will submit portfolios of accomplishment that establish the design capabilities of the lead designer and design firm. In Stage II, shortlisted lead designer-A/E teams will be invited to participate in a design charrette.

Stage I
All documentation will be in an 8 1/2” x 11” format. The assembled content for the Stage I portfolio should be no more than 1/4 inch thick. Submissions may be double-sided where feasible. The portfolio should include the following: a cover letter referencing the FedBizOpps announcement and briefly describing the firm and its location, organizational makeup, and noteworthy accomplishments; Standard Form 330 Architect Engineer Qualifications Part II; credentials of historic preservation specialist; and responses to the submission requirements and evaluation criteria listed below.

An A/E Evaluation Board consisting of a private sector peer and representatives of the client and GSA will evaluate the submissions. The board will establish a shortlist of three to six firms.

Identification of team members, other than the lead designer(s), is not required at this stage. Consultant and “production firm” (if different from the design firm) information should not be included in the Stage I portfolio.

Submission Requirements And Evaluation Criteria:
(1) PAST PERFORMANCE ON DESIGN (35%): The A/E firm(s) will submit a portfolio of not more than five renovation projects completed in the last ten years (maximum of five pages per project). At least two projects should include restoration/conservation work and represent a history of commendable design work in the restoration/conservation specialty. The narrative shall address the
design approach with salient features for each project and discuss how the client’s program, functional, image, mission, economic, schedule, and operational objectives were satisfied by the overall design/planning solution. It should describe how preservation goals were met and address the relevance of submitted projects to this project, including INSERT ANY SPECIAL ISSUES TO BE ADDRESSED—EXAMPLE: the integration of contemporary functions and technology in an historic building. This section of the submission should include tangible evidence such as certificates, awards, peer recognition, etc., demonstrating design excellence, and provide a client reference contact for each project, including name, title, address, email, phone, and fax numbers. A representative floor plan, a site plan, a building section, or other appropriate drawing, and a minimum of four photographs must be included for each project.

(2) PHILOSOPHY AND DESIGN INTENT (25%): In the lead designer’s words (maximum of two pages), as related to this project, state: the parameters of an overall design philosophy; his/her approach to the challenge of historic public architecture and related issues; parameters that may apply in creating INSERT DESCRIPTION OF PROJECT TYPE OR ISSUES—EXAMPLE: an effective approach to accommodating contemporary uses in an historic building; and a commitment to integrated and sustainable design.

(3) LEAD DESIGNER PROFILE (15%): Submit a biographical sketch (maximum of three pages) including education, professional experience, recognition for design efforts inclusive of the portfolio examples, and identify and describe areas of responsibility and commitment to each project.

(4) LEAD DESIGNER PORTFOLIO (25%): Submit a portfolio representative of the lead designer’s ability to provide design excellence. Address his or her participation in each project. If a single designer, submit a portfolio of up to three projects completed in the last ten years (maximum of five pages per project). If the lead designer is a team, submit graphics and a description of up to two projects from each lead designer or lead design discipline. The narrative shall address the design philosophy with salient features for each project and discuss how the client’s program, functional, image, mission, economic, schedule, and operations and maintenance objectives were satisfied by the overall design/planning solution. Include tangible evidence such as certificates, awards, peer recognition, etc., demonstrating design excellence. Where there is duplication with criteria (1) Past Performance on Design, the lead designer will address his or her participation in the project. The lead designer shall demonstrate a history of commendable design work in restoration/conservation, and rehabilitation.

Stage II
The shortlisted lead designers and associated A/E firms will be notified and asked to submit more detailed information indicating each member of the design team, including all outside consultants. Sufficient time will be provided for the lead designer and associated A/E design firm to establish its team. The firms will be required to complete Standard Form 330 Architect Engineer Qualifications Parts I and II that reflect the entire
design team. The government will establish the detailed evaluation criteria and the date that these submittals are due and provide the selection criteria for the interviews along with the Stage I shortlist announcement. INSERT NOTICE OF SMALL BUSINESS NETWORKING SESSION IF PLANNED.

The board will interview each team. Candidates should be prepared to discuss all aspects of the criteria indicated above and evaluation criteria as established for Stage II, and demonstrate their ability to fulfill all project requirements. Emphasis will be placed on the lead designer-A/E team's understanding of the unique aspects of the project, their design philosophy, project management process, and quality assurance plan. END THIS PARAGRAPH WITH ONE OF TWO CHOICES:

INSERT IF THERE IS NO CHARRETTE, USE THIS TEXT: Responses to the evaluation criteria and interview questions will be used to rank the lead designer-A/E teams.

OR

IF THERE IS A CHARRETTE, USE THIS TEXT: Lead designers and associated A/E firms selected to participate in Stage II will be further evaluated by an anonymous, one-day design charrette judged by a jury of independent design professionals. The purpose of the design charrette is to further evaluate the lead designer-A/E teams qualifications for the project. The “vision” developed in the charrette will weigh substantially in the lead designer-A/E team ranking. The submitted charrette concepts become the property of the government. The charrette proposals will be used in conjunction with Stage II interview rankings in the final evaluation of lead designer-A/E teams.

IMPORTANT INFORMATION FOR STAGE I SUBMITTALS

Firms having the capabilities to perform the services described in this announcement are invited to respond by submitting Standard Form 330 Architect Engineer Qualifications Part II, which must not be dated more than twelve (12) months before the date of this synopsis along with letter of interest and the portfolio TO:

Contracting Officer: INSERT NAME
Delivery Address: INSERT ADDRESS
Phone number: INSERT PHONE NUMBER

ALL SUBMISSIONS ARE DUE by 3:00PM local time on INSERT DUE DATE OF THIS NOTICE.

A total of INSERT NUMBER OF COPIES REQUIRED copies should be submitted. The following information must be on the outside of the sealed envelope 1) solicitation number/title, 2) due date, 3) closing time. Late responses are subject to FAR 52.214-7.
Defining and Announcing Design Excellence Opportunities

Modernization of an Historic Structure page 6

INSERT SMALL BUSINESS OR OTHER PROCUREMENT REQUIREMENTS.
THIS TEXT IS TYPICAL FOR PROCUREMENTS OPEN TO SMALL AND
LARGE BUSINESSES: This procurement is being made under the Small Business
Competitiveness Demonstration Program (FAR 52.219-19). This procurement is open to
small and large business concerns. Before award of the contract, the A/E (if not a small
business of $12,000,000 gross receipts over a three (3) year period or no more than
$4,000,000 gross average receipts per year for the same time frame) shall be required
to present an acceptable Small Business and Small Disadvantaged Business
Subcontracting Plan in accordance with Public Law 95-507. Small, women-owned, and
small disadvantaged firms are strongly encouraged to participate as prime contractors
or as members of joint ventures with other small businesses. All interested large
business firms are reminded that the successful firm will be expected to place subcontracts
to the maximum practical extent with small and disadvantaged firms as part of their
original submitted teams (Stage II).

OR

THIS TEXT IS TYPICAL FOR PROCUREMENTS LIMITED TO SMALL
BUSINESSES: This procurement is being made under the Small Business
Competitiveness Demonstration Program (FAR 52.219-19). This procurement is a set-
aside and restricted to small businesses. The NAICS Code is 541310; the size standard
is no more than $12,000,000 gross receipts over a three (3) year period or no more than
$4,000,000 gross average receipts per year for the same time frame. Small,
women-owned, and small disadvantaged firms are strongly encouraged to participate as
prime contractors or as members of joint ventures with other small businesses.

Contract will be procured under the Brooks A/E Act and FAR Part 36. The government
will not allow payment for travel, living expense, computer time or hookups for the prime
or the consultants during the selection process. This is not a request for proposals.
The General Services Administration (GSA) Design Excellence Program seeks to commission architects and engineers to maintain and modernize our legacy federal buildings for the next 50 to 100 years of service. These projects are to demonstrate the value of integrated design that balances historic significance with current needs; balances aesthetics, cost, constructability, and reliability; and creates environmentally responsible and superior workplaces for civilian federal employees.

In this context, GSA announces an opportunity for performance of architectural-engineering design in accordance with GSA quality standards and requirements. As required by law, all facilities will meet Federal energy targets and security requirements.
See the attached Word document for the full solicitation. **THE TEXT UP TO THIS POINT SHOULD BE ENTERED INTO FEDBIZZOPS, A WORD DOCUMENT THAT INCLUDES THIS INTRODUCTORY TEXT AND THE TEXT THAT FOLLOWS SHOULD BE ATTACHED TO THE FEDBIZZOPS ANNOUNCEMENT.**

**PROJECT DESCRIPTION**

The **INSERT NAME OF BUILDING** is located **INSERT LOCATION**. The project involves **BRIEFLY DESCRIBE TYPE OF WORK** and will **INSERT A ONE OR TWO SENTENCE DESCRIPTION OF THE GOAL OR INTENTION OF THE PROJECT—EXAMPLE**: updating the building systems or improving the facility’s energy efficiency. **INSERT IF APPLICABLE A BRIEF DESCRIPTION OF THE PROJECT DELIVERY METHOD—EXAMPLE**: CMc, traditional design-bid-build.

**SCOPE OF WORK**

The scope of professional services will require at a minimum: professional **INSERT TYPE OF PROFESSIONAL SERVICE REQUIRED** services. The scope of work includes **INSERT SCOPE OF WORK—EXAMPLE**: concept design documents, design development documents, construction documents, specifications, cost estimates, value engineering services, computer-aided design and drafting (CADD), and post-construction contract services (PCCS). **INSERT IF NEEDED**: Other special requirements include: **LIST ANY SPECIAL EXPERTISE NEEDED TO COMPLETE THE PROJECT—EXAMPLES**: space planning and systems evaluation. The project is also to include GSA design standards for secure facilities, conformance to the P100 (Facility Standards for Public Buildings), sustainability goals, and customer agency requirements.

**SELECTION PROCESS**

This is a request for qualifications (RFQ) of A/E firms/lead designers interested in contracting for this work. **STATE IF BOTH A LEAD ARCHITECTURAL DESIGNER AND A LEAD ENGINEER DESIGNER ARE REQUIRED.**

The A/E firm as used in this RFQ means an individual, firm, partnership, corporation, association, or other legal entity permitted by law to practice the profession of architecture or engineering that will have contractual responsibility for the project design. The lead designer is the individual or the team of designers who will have primary responsibility to develop the concept and the project design.

A/E firms are advised that at least 35% of the level of contract effort must be performed in the **INSERT CITY, STATE, OR RADIUS** in which the project is located. The A/E firm will address the contractual relationship with the lead designer and project team in Stage II. **INSERT IF NEEDED**: At that time, the following specialty consultants will be required: **LIST SPECIALTY CONSULTANTS**.

The A/E selection will be completed in two stages as follows: In Stage I, interested lead designers and associated A/E firms will submit portfolios of accomplishment that
Limited Scope Project

establish the design capabilities of the lead designer and design firm. In Stage II, shortlisted lead designer-A/E teams will be interviewed.

Stage I
All documentation will be in an 8 1/2” x 11” format. The assembled content for the Stage I portfolio should be no more than 1/4 inch thick. The portfolio should include the following: a cover letter referencing the FedBizOpps announcement and briefly describing the firm and its location, organizational makeup, and noteworthy accomplishments; Standard Form 330 Architect Engineer Qualifications Part II; and responses to the submission requirements and evaluation criteria listed below. An A/E Evaluation Board consisting of a private sector peer and representatives of the client and GSA will evaluate the submissions. The board will establish a shortlist of three to six firms.

Identification of team members, other than the lead designer(s), is not required at this stage. Team member information should not be included in the Stage I portfolio.

Submission Requirements And Evaluation Criteria:

1. PAST PERFORMANCE ON DESIGN (35%): The A/E firm(s) will submit a portfolio of not more than five similarly scoped projects completed in the last ten years (maximum of five pages per project). The narrative shall: address the design approach with salient features for each project and discuss how the client’s program, functional, image, mission, economic, schedule, and operational objectives were satisfied by the overall design/ planning solution; address the relevance of submitted projects to the GSA project; and provide a client reference contact for each project, including name, title, address, email, phone, and fax numbers. A representative floor plan, a building section and a minimum of two photographs must be included for each project.

2. PHILOSOPHY AND DESIGN INTENT (25%): In the lead designer’s words, (maximum of two typewritten pages) state the parameters he/she will apply to the challenges of: designing limited scope projects for major public facilities; meeting federal standards and codes; addressing sustainable design goals of construction waste management, energy efficiency, and environmental responsibility; managing work in occupied buildings; and integrating new design into existing systems and infrastructure.

3. LEAD DESIGNER PROFILE (15%): Submit a biographical sketch (maximum of three pages) including education, professional experience, recognition for design efforts inclusive of the portfolio examples. Identify and describe areas of responsibility and commitment to each project.

4. LEAD DESIGNER PORTFOLIO (25%): Submit a portfolio representative of the lead designer’s ability to provide design excellence. Address his or her participation in each project. If a single designer, submit a portfolio of up to three projects completed in the last ten years (maximum of five pages per project). If the lead designer is a team, submit graphics and a description of up to two projects from each lead designer or lead design discipline. The narrative shall
address the design philosophy with salient features for each project and discuss how the client's program, functional, image, mission, economic, schedule, and operations and maintenance objectives were satisfied by the overall design/planning solution. Include tangible evidence such as certificates, awards, peer recognition, etc., demonstrating design excellence. Where there is duplication with criteria (1) Past Performance on Design, the lead designer shall address his or her participation in the project.

Stage II
The shortlisted lead designers and associated A/E firms will be notified and asked to submit more detailed information indicating each member of the design team, including all outside consultants. Sufficient time will be provided for the lead designer and associated A/E design firm to establish its team. The firms will be required to complete Standard Form 330 Architect Engineer Qualifications Parts I and II that reflect the entire design team. The government will establish the detailed evaluation criteria and the date that these submittals are due and provide the selection criteria for the interviews along with the Stage I shortlist announcement. INSERT NOTICE OF SMALL BUSINESS NETWORKING SESSION IF PLANNED.

The board will interview each team. Candidates should be prepared to discuss all aspects of the criteria indicated above and evaluation criteria as established for Stage II, and demonstrate their ability to fulfill all project requirements. Emphasis will be placed on the lead designer-A/E team's understanding of the unique aspects of the project, their design philosophy, project management process, and quality assurance plan. Responses to the evaluation criteria and interview questions will be used to rank the shortlisted lead designer-A/E teams.

IMPORTANT INFORMATION FOR STAGE I SUBMITTALS
Firms having the capabilities to perform the services described in this announcement are invited to respond by submitting Standard Form 330 Architect Engineer Qualifications Part II, which must not be dated more than twelve (12) months before the date of this synopsis along with letter of interest and the portfolio TO:
Contracting Officer: INSERT NAME
Delivery Address: INSERT ADDRESS
Phone number: INSERT PHONE NUMBER

ALL SUBMISSIONS ARE DUE by 3:00PM local time on INSERT DUE DATE OF THIS NOTICE.

A total of INSERT NUMBER OF COPIES REQUIRED copies should be submitted. The following information must be on the outside of the sealed envelope 1) solicitation number/title, 2) due date, 3) closing time. Late responses are subject to FAR 52.214-7.
I N S E R T SMALL BUSINESS OR OTHER PROCUREMENT REQUIREMENTS. THIS TEXT IS TYPICAL FOR PROCUREMENTS OPEN TO SMALL AND LARGE BUSINESSES: This procurement is being made under the Small Business Competitiveness Demonstration Program (FAR 52.219-19). This procurement is open to small and large business concerns. Before award of the contract, the A/E (if not a small business of $12,000,000 gross receipts over a three (3) year period or no more than $4,000,000 gross average receipts per year for the same time frame) shall be required to present an acceptable Small Business and Small Disadvantaged Business Subcontracting Plan in accordance with Public Law 95-507. Small, women-owned, and small disadvantaged firms are strongly encouraged to participate as prime contractors or as members of joint ventures with other small businesses. All interested large business firms are reminded that the successful firm will be expected to place subcontracts to the maximum practical extent with small and disadvantaged firms as part of their original submitted teams (Stage II).

OR

THIS TEXT IS TYPICAL FOR PROCUREMENTS LIMITED TO SMALL BUSINESSES: This procurement is being made under the Small Business Competitiveness Demonstration Program (FAR 52.219-19). This procurement is a set-aside and restricted to small businesses. The NAICS Code is 541310; the size standard is no more than $12,000,000 gross receipts over a three (3) year period or no more than $4,000,000 gross average receipts per year for the same time frame. Small, women-owned, and small disadvantaged firms are strongly encouraged to participate as prime contractors or as members of joint ventures with other small businesses.

Contract will be procured under the Brooks A/E Act and FAR Part 36. The government will not allow payment for travel, living expense, computer time or hookups for the prime or the consultants during the selection process. This is not a request for proposals.
FedBizOpps
Defining and Announcing Design Excellence Opportunities

**Standard Form 330**

This form is available at [http://www.gsa.gov/Portal/gsa/sp/formslibrary.do?](http://www.gsa.gov/Portal/gsa/sp/formslibrary.do?) under the Form Type Standard Forms.

### ARCHITECT ENGINEER QUALIFICATIONS

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**PURPOSE**

Federal agencies use this form to obtain information from architect-engineer (A/E) firms about their professional qualifications. Federal agencies select firms for A/E work on the basis of professional qualifications as required by the Brooks A-2 Act (40 U.S.C. 3161-3164) and Part 36 of the Federal Acquisition Regulation (FAR).

The Brooks A-2 Act requires the public announcement of requirements for A/E services (with some exceptions provided by other statutes), and the selection of at least three of the most highly qualified firms based on demonstrated competence and professional qualifications according to specific criteria published in the announcement.

The Act then requires the negotiation of a contract at a fair and reasonable price starting first with the most highly qualified firm.

The information used to evaluate firms is from this form and other sources, including performance evaluations, any additional data requested by the agency, and interviews with the most highly qualified firms and their references.

**GENERAL INSTRUCTIONS**

Part I contains the qualifications for a specific contract.

Part II presents the general qualifications of a firm or a specific branch office of the firm. Part II has two uses:

1. An A/E firm may submit Part II to the appropriate central, regional, or local office of each federal agency to which the firm applies.
2. A public announcement is not required if certain requirements and agencies may use Part II as a basis for selecting at least three of the most highly qualified firms for discussions prior to exercising submission of Part I. Firms are encouraged to submit Part II with the agency, as appropriate, according to FAR Part 35. If a firm has branch offices, submit a separate Part II for each branch office.

**INDIVIDUAL AGENCY INSTRUCTIONS**

Individual agencies may supplement these instructions. For example, they may limit the number of projects or number of pages submitted in Part I in response to a public announcement for a particular project. Carefully comply with any agency instructions when preparing and submitting this form. Be as concise as possible and provide only the information requested by the agency.

**DEFINITIONS**

**Architect-Engineer Services.** Defined in FAR 2.101.

**Branch Office.** A geographically distinct place of business or subsidiary office at a firm that has a key role on the team.

**UNPRC: Primary technical capability or key personnel, as evidenced by academic degree, professional registration, certification, and/or extensive experience.**

**Firm.** Defined in FAR 2.102.

**Key Personnel.** Individuals who will have major contract responsibilities and/or provide unique experience.

**SPECIFIC INSTRUCTIONS**

Part I - Presents Specific Qualifications

**Section A. Contract Information.**

1. **Title and Location.** Enter the title and location of the contract for which this form is being submitted, exactly as shown in the public announcement or agency request.

2. **Public Notice Date.** Enter the posted date of the agency's notice in the Federal Business Opportunity website (FedBizOpps), either form of public announcement or agency request for this contract.

3. **Solicitation or Project Number.** Enter the agency's solicitation number and/or project number, if applicable, exactly as shown in the public announcement or agency request for this contract.

**Section B. ARCHITECT-ENGINEER PLANS OF CONTRACT.**

- **Address:** Name, Title, Name of Firm, Telephone Number, Fax Number, and E-mail (Electronic Mail) Address. Provide information for a representative of the prime contractor or joint venture that the agency can contact for additional information.
Section C - Proposed Team

9.11 Firm Name, Address, and Role in This Contract: Provide the contractual relationship, name, full mailing address, and a brief description of the role each firm that will be involved in performance of this contract. Use the prime contractor or joint venture partner first; if a firm has branch offices, indicate such individual branch office that will have a key role on the team. The names of subcontractors and outside associates or consultants must be used, and any change must be approved by the contracting officer. (See FAR Part 19, Clauses "Subcontractors and Outside Associates and Consultants (Materials/Equipment/Services)" 1. Attach an additional sheet in the same format as Section C if needed.

Section D - Organizational Chart of Proposed Team:

As an attachment after Section C, present an organizational chart of the proposed team showing the names and titles of all key personnel listed in Section E and the firm they are associated with as noted in Section C.

Section E - Resumes of Key Personnel Proposed for This Contract:

Complete the section for each key person who will participate in this contract, group by firm, with personnel of the prime contractor or joint venture partner firms first. The following blocks must be completed for each resume:


10. Years Experience: Total years of relevant experience since 1971, and years of relevant experience with current firm, but not necessarily the same branch office. (Block 14a).

14. Firm Name and Location: Name, city and state of the firm where the person currently works, which must correspond with one of the firms (or branch office of a firm, if appropriate) listed in Section C.

16. Education: Provide information on the highest relevant academic degree received. Indicate the areas of specialization for each degree.

17. Current Professional Registration: Provide information on any current professional registration held in any state or possession of the United States, Puerto Rico, or the District of Columbia according to FAR Part 36.

18. Other Professional Qualifications: Provide information on any other professional qualifications relating to this contract, such as education, professional registration, publications, organizational memberships, certifications, training, awards, and foreign language capabilities.

19. Relevant Projects: Provide information on up to five projects to which the person had a significant role that demonstrated the person’s capability relevant to his/her proposed role in this contract. These projects do not necessarily have to be any of the projects presented in Section F for the project team if the person was not involved in any of those projects or the person worked on other projects that were more relevant than the team projects in Section F. Use the check box provided to indicate if the project was performed with any other office of the current firm. If any of the professional services or construction projects are not complete, leave Year Completed blank and indicate that status in Brief Description of Project and Reference to This Contract (Block 9d).

Section F - Example Projects Which Best Illustrate Proposed Team’s Qualifications for This Contract:

Select projects where multiple team members worked together, if possible, that demonstrate the team’s capability to perform work similar to that required for this contract. Complete one Section F for each project. Include two projects, unless otherwise specified by the agency. Complete the following blocks for each project:

20. Example Project Key Number: Start with "1" for the first project and number sequentially.

21. Title and Location: Title and location of project or contract. For an indefinite delivery contract, the location is the geographic scope of the contract.

22. Year Completed: Enter the year completed of the professional services (such as planning, engineering, design, or surveying) and, for construction, if applicable. If any of the professional services or the construction projects are not complete, leave Year Completed blank and indicate that status in Brief Description of Project and Reference to This Contract (Block 9d).

23a. Project Owner: Project owner or employer, such as a government agency or institution, an association, a corporation or private individual.

23b. Point of Contract Name: Provide name of the person associated with the project owner or the organization which contracted for the professional services, who is very familiar with the project and the firm’s (or firm’s) performance.

23c. Point of Contact Telephone Number: Self-explanatory.

21. Brief Description of Project and Reference to This Contract: Indicate scope, size, cost, principal elements and special features of the project. Discuss the relevance of the example project to this contract. Enter any other information requested by the agency for each example project.
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Chapter 5 Resources
Part B - General Identifications

Run the "General Identifications" on page 1 for forms with branch offices. Prepare Part B for the specific branch office seeking work if the firm has branch offices.

1. Selection Number. If Part B is submitted for a specific contract, insert the agency's selection number and/or project number, if applicable, exactly as shown in the public announcement or agency request.

2.a. Firm Name and Address. Delete/incomplete.

3. Year Established. Enter the year the firm (or branch office, if appropriate) was established under the current name.

4. DUNS Number. Insert the Data Universal Numbering System number issued by Dun and Bradstreet Information Resources. Firm must have a DUNS number. See F310 Part 4.0.

5. Ownership.

   a. Type. Enter the type of ownership or legal structure of the firm (sole proprietor, partnership, corporation, joint venture, etc.).

   b. Small Business Status. Refer to the North American Industry Classification System (NAICS) code in the public announcement, and indicate if the firm is a small business according to the current size standard for that NAICS code. (For example, Engineering Services (part of NAICS 541330). Architectural Services (NAICS 541311). Surveying and mapping services (NAICS 541320). The small business categories and the internet website for the NAICS codes appear in F891 Part 1B. Contact the requesting agency for any questions. Provide your local U.S. Small Business Administration office for any questions regarding Business Status.

6.Bc. Point of Contact. Provide this information for a representative of the firm that the agency can contact for additional information. The representative must be empowered to speak on contractual and policy matters.

7. Name of Firm. Enter the name of the firm if Part B is prepared for a branch office.

On Bc. Former Firm Names. Indicate any other previous names for the firm (or branch office) during the last six years. Insert the year that the corporate name change was effective and the associated NAICS Number. This information is used to review past performance on Federal contracts.

8. Employees by Discipline. Use the relevant disciplines and associated function codes shown at the end of these instructions and list in the same numerical order. After the listed disciplines, write in any additional disciplines and leave the function code blank. List no more than 20 disciplines. Group remaining employees under "Other Employees" as columns b. Each person can be counted only once according to his/her primary function. If Part B is prepared for a firm including all branch offices, write the number of employees by discipline in column c(1). If Part B is completed for a branch office, enter the number of employees by discipline in column c(2) and for the firm in column c(1).

II. Nature of Firm's Experience and Annual Average Revenue for Last 5 Years. Complete this block for the firm or branch office for which this Part B is prepared. Enter the experience categories within most accurately reflect the firm's technical capabilities and project experience. Use the relevant experience categories and associated profile codes shown at the end of these instructions, and list in the same numerical order. After the listed experience categories, write in any unlisted relevant project experience categories and leave the profile code blank. For each type of experience, enter the appropriate revenue index number to reflect the professional services revenue received annually (averaged over the last 5 years) by the firm or branch office for performing that type of work. A particular project may be identified with one experience category or it may be broken into components, as best reflects the qualifications and types of work performed by the firm. However, do not double count the revenue received on a particular project.

11. Annual Average Professional Services Revenue of Firm for Last 3 Years. Complete this block for the firm or branch office for which this Part II is prepared. Enter the appropriate revenue index numbers to reflect the professional services revenues received annually (averaged over the last 5 years) by the firm or branch office. Include Federal work (performed directly for the Federal Government, either as the prime contractor or subcontractor), non-Federal work (all other domestic and foreign work, including Federally-assisted projects), and the total. If the firm has been in existence for less than 3 years, use the definition for "Annual Receipts" under F310 Part 1B.

12. Authorized Representatives. An authorized representative of the firm or branch office must sign and date the completed form. Signing attests that the information provided is current and factual. Provide the name and title of the authorized representative who signed the form.
### List of Disciplines (Function Codes)

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### List of Experience Categories (Profile Codes)

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<tr>
<td>O03</td>
<td>Ocean, Marineal, Special Weapons</td>
<td>S11</td>
<td>Sustainable Design</td>
</tr>
<tr>
<td>P01</td>
<td>Petroleum Exploration, Refining</td>
<td>S12</td>
<td>Storm Water, Handling &amp; Facilities</td>
</tr>
<tr>
<td>P02</td>
<td>Petroleum, and Fuel, Refining and Distribution</td>
<td>T01</td>
<td>Telecommunications, Radar, Mobile, Intercom, Et al.</td>
</tr>
<tr>
<td>P03</td>
<td>Photomass Engineering</td>
<td>T02</td>
<td>Testing, Inspection Services</td>
</tr>
<tr>
<td>P04</td>
<td>Pipelines, Cross Country, Liquid &amp; Gas</td>
<td>T03</td>
<td>Traffic &amp; Transportation Engineering</td>
</tr>
<tr>
<td>P06</td>
<td>Planning (Community, Regional, Aras and State)</td>
<td>T04</td>
<td>Topographic Surveying, and Mapping</td>
</tr>
<tr>
<td>P07</td>
<td>Planning (Site, Installation, and Project)</td>
<td>T05</td>
<td>Urban Studies, Self-Supporting &amp; Support Systems</td>
</tr>
<tr>
<td>R08</td>
<td>Police &amp; Correction Facilities</td>
<td>T09</td>
<td>Tunnels &amp; Surveys</td>
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### List of Experience Categories (Profile Codes)

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UU1</td>
<td>Urban Utilities: Redevelopment</td>
</tr>
<tr>
<td>UU2</td>
<td>Urban Utilities: Community Development</td>
</tr>
<tr>
<td>UU3</td>
<td>Utilities (Gas and Steam)</td>
</tr>
<tr>
<td>VU1</td>
<td>Value Analysis: Life-Cycle Costing</td>
</tr>
<tr>
<td>W01</td>
<td>Warehouses &amp; Depots</td>
</tr>
<tr>
<td>W02</td>
<td>Water Resources: Hydrology: Ground Water</td>
</tr>
<tr>
<td>W03</td>
<td>Water Supply: Treatment and Distribution</td>
</tr>
<tr>
<td>W04</td>
<td>Wind Turbines: Research/Testing Facilities Design</td>
</tr>
<tr>
<td>201</td>
<td>Zoning: Land Use Studies</td>
</tr>
</tbody>
</table>
# Architect - Engineer Qualifications

### Part I - Contract-Specific Qualifications

**A. Contract Information**

<table>
<thead>
<tr>
<th>TITLE AND LOCATION (site and office)</th>
<th>QUESTION OR PROJECT NUMBER</th>
</tr>
</thead>
</table>

**B. Architect-Engineer Point of Contact**

<table>
<thead>
<tr>
<th>NAME AND TITLE</th>
<th>PHONE</th>
<th>FAX</th>
<th>EMAIL ADDRESS</th>
</tr>
</thead>
</table>

**C. Proposed Team**

(Complete this section for the prime contractor and all key subcontractors.)

<table>
<thead>
<tr>
<th>序号</th>
<th>公司名</th>
<th>地址</th>
<th>职位</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
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<tr>
<td>5</td>
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</tr>
</tbody>
</table>

**D. Organizational Chart of Proposed Team**

[Attached]

Authorized for local reproduction

Standard Form 330 (8/2000) Page 1
### Table 5.1: Key Personnel

<table>
<thead>
<tr>
<th>Name</th>
<th>Role in Contract</th>
<th>Years of Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

#### Education (Degree and Specializations)
- M.S. in Professional Management

#### Relevant Projects

<table>
<thead>
<tr>
<th>Project</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

**Standards Form 330**

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*Chapter 5 Resources*
### FedBizOpps

**Defining and Announcing Design Excellence Opportunities**

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**Standard Form 330 page 11**

---

#### Example Projects Which Best Illustrate Proprietary Team's Qualifications for This Contract

<table>
<thead>
<tr>
<th>1. Title and Location (City and State)</th>
<th>10. Example Project Rev. Number</th>
<th>19. Year Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>[project details]</td>
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</tbody>
</table>

#### Project Owner's Information

<table>
<thead>
<tr>
<th>2. Project Owner</th>
<th>3. Point of Contact Name</th>
<th>4. Point of Contact Telephone Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>[project owner]</td>
<td>[contact name]</td>
<td>[phone number]</td>
</tr>
</tbody>
</table>

#### Firms from Section C Involved With This Project

<table>
<thead>
<tr>
<th>5. Firm Name</th>
<th>6. Firm Location (City and State)</th>
<th>7. Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>[firm name]</td>
<td>[location]</td>
<td>[role]</td>
</tr>
<tr>
<td>[firm name]</td>
<td>[location]</td>
<td>[role]</td>
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<tr>
<td>[firm name]</td>
<td>[location]</td>
<td>[role]</td>
</tr>
<tr>
<td>[firm name]</td>
<td>[location]</td>
<td>[role]</td>
</tr>
<tr>
<td>[firm name]</td>
<td>[location]</td>
<td>[role]</td>
</tr>
</tbody>
</table>

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*Standard Form 330 is used in PAGE 9*
## Key Personnel Participation in Example Projects

<table>
<thead>
<tr>
<th>No.</th>
<th>Name of Key Personnel (From Section E, Block 12)</th>
<th>Role in This Contract (From Section E, Block 12)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

### Example Project Key

<table>
<thead>
<tr>
<th>No.</th>
<th>Title of Example Project (From Section E)</th>
<th>No.</th>
<th>Title of Example Project (From Section E)</th>
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<tbody>
<tr>
<td>1</td>
<td>A</td>
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<td>A</td>
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<tr>
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<td>B</td>
<td>7</td>
<td>B</td>
</tr>
<tr>
<td>2</td>
<td>C</td>
<td>8</td>
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</tr>
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<td>1</td>
<td>D</td>
<td>9</td>
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</tr>
<tr>
<td>5</td>
<td>E</td>
<td>10</td>
<td>E</td>
</tr>
</tbody>
</table>

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68 chapter 5 resources
FedBizOpps
Defining and Announcing Design Excellence Opportunities

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M. ADDITIONAL INFORMATION

TO PROVIDE ANY ADDITIONAL INFORMATION REQUESTED BY THE AGENCY. ATTACH ADDITIONAL SHEETS AS NEEDED.

I. AUTHORIZED REPRESENTATIVE

The foregoing is a statement of facts.

SIGNATURE
NAME AND TITLE

DATE

STANDARD FORM 330 CW 2006 PAGE 5
**ARCHITECT ENGINEER QUALIFICATIONS**

**PART II - GENERAL QUALIFICATIONS**

- **NAME OF ARCHITECT ENGINEER/ARCHITECT**
- **ADDRESS**
- **CITY STATE ZIP CODE**
- **DATE ESTABLISHED**
- **OWNERSHIP**

**EMPLOYEES BY DISCIPLINE**

<table>
<thead>
<tr>
<th>Function</th>
<th>Disciplines</th>
<th>No. of Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

**PROFESSIONAL SERVICES REVENUE INDEX NUMBER**

1. Less than $1 million
2. $1 million to less than $2 million
3. $2 million to less than $5 million
4. $5 million to less than $10 million
5. $10 million to less than $25 million
6. $25 million to less than $50 million
7. $50 million to less than $100 million
8. $100 million to less than $250 million
9. $250 million to less than $500 million
10. $500 million or greater

**AUTHORIZED REPRESENTATIVE**

- **Signature**
- **Date**
Pre-Submittal Meeting Agenda

The pre-submittal meeting agenda should include these items:

- Welcome: Purpose of the Meeting
- The Project: Purpose of the Facility
- The Program: What Will the Structure Contain?
- Specific Issues: Security, Sustainability, Functionality, Workplace Performance, Preservation
- The Site: Description of Site (If Available and If There Is No Charrette)
- The City: The Context for Design
- The Process: Description of the Selection Process
- Schedule: Selection, Design, Construction
- Questions and Answers
Pre-Submittal Meeting Packet

The pre-submittal meeting packet should contain these items:

- Agenda
- Copy of FedBizOpps Announcement
- Schedule
- Selection Process
- Site Information (If Available and If There Is No Charrette)
- Information on the GSA Design Excellence Program and the National Peers
6 Strategies for Selecting the Lead Designer and the Design Excellence A/E Team
Strategies for Selecting the Lead Designer and the Design Excellence A/E Team

6.0 Introduction
6.1 Coordinating with OCA
6.2 Establishing the A/E Evaluation Board
6.3 Planning the Selection Process
6.4 Procedures Governing the A/E Selection Process
6.5 Stage I Portfolio Evaluations
6.6 Stage I—Lead Designer-A/E Team Interview
6.7 Stage II—The Cha sette Option
6.8 Stage III—Vision Competition
6.9 Contrasting with the A/E Firm Selected Interim
6.10 Peer Roles
6.11 Peers in the A/E Selection Process

Stage I and Stage II

Stage I Evaluation Sheet
Sample Letter to Shortlisted Firms
Sample FedBizOpps Announcement
Sample Selection Letter
Sample Interview Letter
Alternative Sample Interview Letter
Sample Invitation to Networking Session
Sample Stage II Interview Schedule
Sample Stage II Interview and Cha sette Schedule
Sample Stage II Evaluation Sheet

Cha sette
Sample Cha sette Rules
Sample Cha sette Program

Vision Competition
Sample Vision Competition Program
Sample Vision Competition Briefing Agenda
Sample Vision Competition Jury Agenda
Sample Vision Competition Jury Ranking Form
Sample FedBizOpps Announcement of Final Decision
Strategies for Selecting the Lead Designer and the Design Excellence A/E Team

6.0 Introduction

This chapter on the Design Excellence process deals with selecting the lead designer-A/E team. The selection process itself was determined when the FedBizOpps announcement went out. Now the focus is on putting together the A/E Evaluation Board, articulating the criteria used in evaluating the portfolios and team interviews, and if necessary, planning for a charrette or vision competition. The chart that follows offers an overview of the steps and options in this phase of Design Excellence.

DESIGN-BUILD—A SPECIAL NOTE

The processes outlined in this publication must be applied to all Design Excellence procurements including design-build. In the case of design-build procurements, however, the Design Excellence process must be uniquely tailored to the specific nature and schedule of the project. For design-build projects, then, the region must contact the Chief Architect several weeks before the FedBizOpps announcement is written to determine exactly how Design Excellence procedures will be integrated into the procurement and design concept development.
Selecting the Lead Designer-A/E Team: Strategies and Options

**DESIGN EXCELLENCE STEPS**

1. **Selecting the Lead Designer-A/E Team**

   - Recommend Professionally Qualified A/E Evaluation Board

2. **Seek Chief Architect’s Concurrence and Appoint A/E Evaluation Board**

3. **Receive and Qualify Stage I Submissions**
   - Coordinate Schedule with Center for Design Excellence and the Arts to Ensure Participation of National Peer
   - Hold Stage I Portfolio Evaluation Meeting

4. **Shortlist Developed of Most Qualified Lead Designer-A/E Firms by A/E Evaluation Board**

5. **Announce Stage I Shortlist in FedBizOpps**

6. **Solicit Stage II Lead Designer-A/E Team Interview Submissions**
   - Convene Networking Sessions to Support Development of A/E Teams

**DESIGN EXCELLENCE OBJECTIVES**

1. **Maintain the Professional Integrity of the A/E Evaluation Board, Limiting Membership to One Person in Each of the Following Five Categories:**
   - A Professional Architect from the Region
   - A Professional Engineer from the Region
   - An OCA Design Professional
   - A National Peer Professional
   - A Professionally Qualified Customer Representative

2. **Receive and Qualify Stage II Submissions Including Complete SF330**
   - Coordinate Schedule of Stage II Lead Designer-A/E Team Interviews with OCA Center for Design Excellence and the Arts to Ensure Participation of National Peer
   - A/E Evaluation Board Evaluates Each Lead Designer-A/E Team's SF 330
   - A/E Evaluation Board Conducts Lead Designer-A/E Team Interviews

*continue with one of three options*
Strategies for Selecting
the Lead Designer and the Design Excellence A/E Team

**OPTION 1: TWO-STAGE**
- Ranking of Lead Designer-A/E Teams by A/E Evaluation Board
- Recommendation to the GSA Regional Selection Authority by the A/E Evaluation Board
- Final Selection by the GSA Regional Selection Authority
- Contract Negotiation and Award

**OPTION 2: TWO-STAGE PLUS DESIGN CHARRETTE**
- Coordinate Planning with OCA and Charrette Advisor and Hold Design Charrette
- Presentation of the Jury Ranking and Report to the A/E Evaluation Board by Jury Chair and Charrette Advisor
- Ranking of Lead Designer-A/E Teams by A/E Evaluation Board Incorporating Charrette Ranking
- Recommendation to the GSA Regional Selection Authority by the A/E Evaluation Board
- Final Selection by the GSA Regional Selection Authority
- Contract Negotiation and Award

**OPTION 3: THREE-STAGE**
- Shortlisting of Most Qualified Lead Designer-A/E Firms by A/E Evaluation Board for Participation in Stage III Vision Competition
- Coordinate Planning with OCA and Competition Advisor and Hold Vision Competition
- Blind Evaluation of Vision Competition by Independent Jury of National Peers
- Presentation of the Jury Ranking and Report to the A/E Evaluation Board by Jury Chair and Charrette Advisor
- Ranking of Lead Designer-A/E Teams by A/E Evaluation Board Incorporating Vision Competition Ranking
- Recommendation to the GSA Regional Selection Authority by the A/E Evaluation Board
- Final Selection by the GSA Regional Selection Authority
- Contract Negotiation and Award
6.1 Coordinating with OCA

The Office of the Chief Architect wants to support each Design Excellence project with the best possible national peers. Contacting the OCA Center for Design Excellence and the Arts at least one month in advance of any A/E selection meeting or peer review is critical to this effort. The same peer must be involved throughout the selection process and continues through concept reviews, a consistent presence that only happens with schedule flexibility and as much advance notice as possible.

6.2 Choosing and Appointing the A/E Evaluation Board

The role of the Architect/Engineer (A/E) Evaluation Board is described in F.A.R. 36.602-3. The make up of the board is described in GSAM 536.602.

ISSUES OF BALANCE, RESPECT, AND COLLABORATION

Each member of the board should be knowledgeable in relevant disciplines and should be selected based on the expertise needed for decision making related to a particular project. By combining expertise, the board has a balance that allows each board member to learn from the others. Each member should respect the views of his/her fellow board members. This requires that the board be comprised of individuals who are of similarly high standing in their respective fields. The board should share a spirit of collaboration. Open, searching minds, and candid discussion will result in decisions that all can support.

A/E EVALUATION BOARD

A/E Evaluation Board members must be experts in the fields of architecture, engineering or related design professions, such as landscape architecture, urban design, and interior design, except as provided in 536.602-2(c)(5). Board members must also have expertise in construction, government, and related acquisition matters. The majority of board members must be GSA employees. Other members may include other federal government
employees or members of the GSA National Register of Peer Professionals who are private-sector practitioners of architecture, engineering, and the related design professions.

The Evaluation Board shall be composed five voting members:

- One highly qualified regional GSA architect or a related regional GSA design professional.
- One highly qualified regional GSA engineer.
- One design professional from OCA.
- One private-sector design professional chosen from the GSA National Register of Peer Professionals by the Office of the Chief Architect Center for Design Excellence and the Arts.
- One customer representative with both design and procurement expertise.

The GSA project manager may not be a member of the board.

Two advisors—one from GSA and the other from the customer (in the case of courthouses, the customer representative should be from the National Administrative Office of the Courts or the AO’s representative)—may participate in the review of submission materials and observe Stage II interviews. The advisors may not be present during the A/E Evaluation Board’s deliberations or voting.

The GSA Selection Authority officially appoints the A/E Evaluation Board members. For new construction and prospectus-level modernization and preservation projects, the Selection Authority must obtain the concurrence of GSA’s Chief Architect on the appointment of board members.

Each board member and advisor must sign a “Conflict of Interest Acknowledgement” and “Nondisclosure Agreement” before the activities of the board commence. No person may serve as a board member or advisor if that person or any member of that person’s family
has any direct financial or employment interest in any of the firms being evaluated. Each board member and advisor is responsible for identifying any possible conflict of interest once A/E firms are identified. Any conflict should be reported to the contracting officer.

The board meets in the GSA regional office. Portfolio information is procurement-sensitive and must not be circulated prior to the official meeting of the board.

A/E EVALUATION BOARD FUNCTIONS
The A/E Evaluation Board shall perform functions as provided in F.A.R. 36.602-3. The A/E Evaluation Board recommends, in order of preference, the most highly qualified lead designer-A/E teams for the specific project to the GSA Selection Authority.

Each board member is responsible individually for evaluating and rating the qualifications of each firm being considered using the established evaluation criteria. The chairperson of the board must maintain the integrity of the evaluation process and ensure that the evaluation is prepared and submitted to the GSA Selection Authority. The GSA Selection Authority will decide whether to accept the A/E Evaluation Board recommendation. The GSA Selection Authority reserves the right to reject the recommendation of the board and/or terminate the process without incurring any liability to any member of any A/E team. The GSA Selection Authority must document the reason(s) that the recommendation of the A/E Evaluation Board is overturned.

6.3 Planning the Selection Process
With the announcement in FedBizOpps of the selection strategy and the appointment of the A/E Evaluation Board, the project manager and contracting officer need to review the details of the Design Excellence process, procedures, and schedule. Planning should cover these key events:
Strategies for Selecting the Lead Designer and the Design Excellence A/E Team

- Sending a Copy of the FedBizOpps Announcement to the OCA Center for Design Excellence and the Arts
- The Pre-Submittal Meeting
- Receipt of Stage I Submissions
- Stage I Evaluation and Shortlisting
- The FedBizOpps Shortlist Announcement
- Stage II Team Interviews Invitation Letter to Shortlisted Firms
- The Team Networking Session
- Receipt of Stage II Submissions
- Stage II Interviews and Evaluation
- Stage II Charrette Coordination with OCA Center for Design Excellence and the Arts including the Center’s Hiring a Charrette Advisor and Appointing a Jury of National Peers (if a Charrette is Part of the Process)
- Charrette Jury Report to the A/E Evaluation Board
- A/E Evaluation Board Report
- Submission of Final A/E Evaluation Board Report and Ranking to GSA Selection Authority
- GSA Selection Authority's Final Selection and Announcement of Its Decision

In the Case of a Three-Stage Process:
- Stage II Interviews, Evaluation, and Shortlisting
- Stage III Vision Competition Coordination with OCA Center for Design Excellence and the Arts including the Center's Hiring a Vision Competition Advisor and Appointing a Jury of National Peers
- Stage III Vision Competition Invitation Letter to Shortlisted Firms
- Pre-Design Competition Briefing and Information Packets
- Vision Competition Jury Report to the A/E Evaluation Board
- A/E Evaluation Board Report Incorporating Vision Competition Ranking
• Submission of Final A/E Evaluation Board Report and Ranking to GSA Selection Authority
• GSA Selection Authority’s Final Selection and Announcement of Its Decision

6.4 Procedures Governing the A/E Selection Process

Within the Design Excellence process, these procedures govern the conduct of the A/E selection process:

All members of the A/E Evaluation Board must sign and adhere to GSA “Conflict of Interest” and “Nondisclosure” policies.

The names of individuals on the A/E Evaluation Board and those on any related charrette or vision competition jury must not be made public in advance of the final selection and contract with the lead designer-A/E team.

All members of the A/E Evaluation Board must have a professional understanding of essential design principles, the GSA procurement process, and ethics related to procurement decisions.

The A/E Evaluation Board chair, in consultation with the contracting officer, must explain and make sure members have a common understanding of the selection process, the selection criteria, and how criteria should be evaluated.

To convene any meeting of the board or jury, a quorum of at least 75 percent of its members must be present to make a recommendation.

Information related to a lead designer-A/E team selection is procurement-sensitive. It must not be discussed or distributed outside official meetings of the A/E Evaluation Board.
Board. There must be no advance sharing of portfolios, SF 330s, or other procurement documents.

Once the deliberation and voting begin, only the five voting members of the A/E Evaluation Board and the contracting officer may be present. All procurement discussions must be done as a group among the five voting members of the A/E Evaluation Board. There must be no evaluative discussions with non-voting members of the A/E Evaluation Board.

The contracting officer and project manager should be available to but not participate in the A/E Evaluation Board activities and discussion. As noted earlier, the project manager should not be present during the deliberation and voting of the A/E Evaluation Board.

Only the five voting members of the A/E Evaluation Board can ask questions during Stage II interviews.

Each A/E Evaluation Board member must provide an independent assessment of each proposal based on the criteria noted in the selection process.

6.5 Stage I—Portfolio Evaluations

**PROCESS**

Stage I portfolios should identify a lead designer (which may be a team as well as an individual) and a design firm. It should include examples of work from both the lead designer and the design firm as well as the lead designer’s profile, and philosophy statement and design intent. Beyond any introductory text, Standard Form 330, Part II should be used as a portfolio coversheet.
For major repair and alteration and/or preservation projects, the lead designer may be a team that, beyond a design architect, could include a preservation architect, interior designer, and/or engineer. In any case where the lead designer is a team, the team’s lead designers as a group should be evaluated as the lead designer.

LOCATION—REGIONAL HEADQUARTERS V. ON-SITE EVALUATIONS
Portfolios should be evaluated in no more than two days for new construction and no more than three days for modernization or preservation projects where, in the latter case, the first day is spent touring the existing building and site. The portfolios for new construction are evaluated in the regional headquarters. Portfolios for modernization and preservation projects may be evaluated in a GSA facility at or near the project site.

CRITERIA AND THE STAGE I EVALUATION
Scoring must be based on the following criteria and percentage weighting:

• **Design Firm: Past Design Performance (35%)**
  Study portfolio narratives describing architectural and engineering challenges and their design solutions. Confirm that the solutions documented really address and meet the challenges. Look for projects that demonstrate creativity, indicate a clear design approach, and fit easily in their context. Review any copies of certificates, awards, evidence of peer recognition, etc. for applicability.

• **Philosophy and Design Intent (25%)**
  This statement from the lead designer should be characterized by clarity, standard grammar, and the absence of clichés and jargon. Reviewers should ascertain the origin of the statement whether it came from the designer or from his or her marketing department. They should ask themselves whether the statement demonstrates an understanding of
the project and the project issues. They should expect clear, thoughtful phrases that demonstrate the ability of the designer to communicate ideas.

• **Lead Designer’s Portfolio (25%)**
  The portfolio should be thoughtfully arranged and composed of materials that demonstrate a basic understanding of the design issues to be addressed in the GSA project. The exhibits should portray creative and appropriate responses to client criteria and needs, demonstrate design leadership, and clearly exemplify design excellence.

• **Lead Designer’s Profile (15%)**
  There is no ideal resumé. Look for a breadth and depth of education and work experience as well as increasing responsibility for delivering the complexity and magnitude of the project GSA has in mind.

**SHORTLIST**

The final element in Stage I is to rank the competing lead designers and their design firms based on their portfolio submissions. The A/E Evaluation Board will then select the top three to six qualified lead designers and associated design firms to participate in Stage II team interviews. Letters are sent to the shortlisted firms and to those not selected. (Samples of these letters are included in the Resources and Sample Documents section of this chapter.) The shortlisted firms must also be announced in FedBizOpps. (A sample of this announcement is included in the Resources and Sample Documents section of this chapter.)
Stage II — Lead Designer-A/E Team Interviews

PROCESS

The goals of Stage II are to have the lead designers and associated design firms selected in Stage I organize complete A/E teams and have the A/E Evaluation Board interview and evaluate these lead designer-A/E teams. If there is no charrette, the board makes a rank order recommendation to the GSA Selection Authority. If there is a charrette, the results are juried by three national peers and that evaluation is incorporated as a component (representing 40% of the final evaluation) in the lead designer-A/E team rankings that are submitted to the GSA Selection Authority. If there is a Stage III vision competition, the A/E Evaluation Board selects the lead designer-A/E teams to advance to Stage III.

The following are aspects of the Stage II A/E team interview process:

• The Interview Letter

Shortly after sending the shortlist letters and announcing the shortlisted firms in FedBizOpps, a more detailed interview letter is sent to the lead designer or individual members of the lead designer team. This specifies the date and location of the interview, the Stage II documentation required, the deadline and address for receipt of these documents, the interview time frame, the types of materials that may be used for the presentation (e.g., graphics only—no models, no design proposals), required handouts (e.g., at least an outline of the presentation), and key presentation and interview issues. (Two sample letters are included in the Resources and Sample Documents section of this chapter.)

• Assembling the A/E Teams

Each lead designer and associated design firm participating in Stage II must form a full and complete A/E team in response to the criteria spelled out in the interview letter. The required documentation should include evidence of how the team will fulfill GSA’s commitment to the socioeconomic initiatives of the federal government. Subcontracting
Strategies for Selecting
the Lead Designer and the Design Excellence A/E Team

goals established by GSA are for small businesses, women-owned businesses, and small disadvantaged businesses.

• Networking Session
  A networking session should be held in the city where the facility is to be located for the local A/E and consulting firms to meet the lead designers and associated design firms to explore opportunities for local firms to join an A/E team. This session should take place within two weeks of publishing the shortlist of finalists in FedBizOpps. (A sample invitation to the Networking Session is included in the Resources and Sample Documents section of this chapter.)

• Completion of Required Forms
  Each A/E team must submit Standard Form 330, which will provide detailed information regarding the team’s organization, qualifications, and past projects. Other documentation may be required.

CRITERIA AND EVALUATION
The Stage II evaluation has several elements:

• A Review of the Stage I Submission Materials
  This allows the A/E Evaluation Board to recall the reasons for shortlisting each lead designer and associated design firm.

• The Evaluation of Standard Form 330 and Other Required Stage II Submission Materials
  StandardForm 330 describes the A/E team make-up and qualifications. The A/E Evaluation Board must evaluate the experience and qualifications of individual team members. It must carefully consider each A/E team’s leadership approach to directing and controlling the project’s development. Then, as it weighs these and other concerns, it must score
each A/E team’s Standard Form 330 and other required Stage II submission materials against the criteria listed on the evaluation form.

• Interviews
  It is important to note that the interview process and schedule is highly structured. (A sample schedule is included in the Resources and Sample Documents section of this chapter.) To help the A/E Evaluation Board follow critical points and take notes, each lead designer-A/E team must distribute an outline of its presentation. Some essential issues in the interview process are:

  **Management Process** — The lead designer-A/E team needs to describe a management process that is cohesive, collaborative, and reasonable. Its plan for management should address lines and methods of communication, decision-making, interaction with consultants, clients and GSA, and the impact or benefit of the geographic location of various resources.

  **Design Excellence** — The A/E team must demonstrate that it would support and collaborate with the lead designer to realize Design Excellence goals. Previous designs should respond to context, promote an appropriate image, demonstrate a high level of functional proficiency, exemplify outstanding workplace and interior design, and integrate state-of-the-art technology. Questions should elicit a thoughtful response to these important project criteria.

  **Presentation** — Portions of the presentation will raise questions. A/E Evaluation Board members should seek clarifications of each team’s attitude and approach concerning specific issues. It is worth noting that if a team failed to address an issue on its own, it may not be a priority. From this perspective, solicited comments on issues might not carry as much weight within the A/E Evaluation Board as issues originally addressed by the team.
Strategies for Selecting the Lead Designer and the Design Excellence A/E Team

Consistency—A/E Evaluation Board members should attempt to ask the same or similar questions of all teams. This will make comparisons easier. Questions should parallel the evaluation criteria.

• Evaluation Criteria and Scoring

A/E Evaluation Board members must evaluate lead designer-A/E teams based on the criteria shared in the interview letter and noted on the evaluation forms. Prior to the interviews, they should use these criteria to evaluate written materials. They may then adjust scores up or down for each lead designer-A/E team based on the interview. The final score should reflect a combined evaluation of the written documentation and the interview.

The following evaluation criteria “groupings” address the F.A.R. items listed under 36.602-1 Selection Criteria:

The A/E Evaluation Board shall evaluate each potential team in terms of:

- Professional qualifications necessary for satisfactory performance of required services.
- Specialized experience and technical competence in the type of work required, including, where appropriate, experience in energy conservation, pollution prevention, waste reduction, and the use of recovered materials.
- Capacity to accomplish the work in the required time.
- Past performance on contracts with government agencies and private industry in terms of cost control, quality of work, and compliance with performance schedules.
- Knowledge of the locality of the project.

For Design Excellence lead designer-A/E team selections, this evaluation is subdivided among these criteria:
• Team Design Performance (50%)
  Review portfolio narratives describing architectural and engineering challenges and the
design response. Confirm that the team’s solutions addressed the challenges. Search
StandardForm 330 for evidence that the team as a whole has experience with the interview
topic issues (e.g., community context, design image, function, sustainable design, team
organization, and commitment of lead designer). Confirm that the team has experience
on projects similar in size and complexity and can work together successfully. Also expect
the presentation to confirm these conclusions.

• Team Organization and Management Plan (30%)
  Through a combination of Standard Form 330 and the oral presentation, each lead
designer-A/E team should identify key roles, lines of communication, and the means to
integrate client and community input; explain quality and cost control plans; provide
the physical location of major design and production work; describe the coordination
plan for consultant work; and outline the work to be produced in remote offices.
A/E Evaluation Board members should analyze each element and its place in the whole.

• Professional Qualifications (15%)
  Standard Form 330 is the primary source for detailed information on key personnel.
  Expect to see resumes of the entire lead designer-A/E team.

• Geographic Location (5%)
  Each lead designer-A/E team must demonstrate that at least 35% of the A/E contract
  services will be accomplished within the geographic boundaries established for the project.

A/E EVALUATION BOARD FINAL RECOMMENDATION
  If there is a Stage III vision competition, the A/E Evaluation Board will assess the written
  submittals for Stage II as well as the interviews and prepare a shortlist of at least three
  lead designer-A/E teams to advance to the vision competition.
If there is no charrette or Stage III vision competition, the A/E Evaluation Board will prepare a ranking of the lead designer-A/E teams with supporting documentation and recommendations. This ranking will be based on the written submittals for Stage II as well as the interviews. The official record of this evaluation and the preferred lead designer-A/E team will be contained in a report submitted to the GSA Selection Authority.

The GSA Selection Authority will review the A/E Evaluation Board report to assure the integrity of the selection process and approve the board’s ranking. The GSA Selection Authority will decide whether to accept the A/E Evaluation Board recommendation and select the recommended lead designer-A/E team. The GSA Selection Authority reserves the right to reject the recommendation of the board or terminate the process without incurring any liability to any member of the lead designer-A/E team. If this happen, the GSA Selection Authority must document the reason(s) that the recommendation of the A/E Evaluation Board is overturned.

The selected lead designer-A/E team will receive a written request for a cost proposal from the GSA contracting officer. After the proposal is received, it will be evaluated and negotiations will be scheduled. In the event that GSA is unable, for any reason, to enter into an agreement with the selected lead designer-A/E team, GSA reserves the right to terminate discussion with the lead designer-A/E team without incurring any liability. GSA will then proceed to negotiate with the second ranked lead designer-A/E team.

**Stage II—The Charrette Option**

Beyond interviews, certain lead designer-A/E team selections include a 10 to 12-hour charrette as additional input to the evaluation. The purpose of the charrette is to get a sense of design strategies and each lead designer-A/E team’s approach to design problems. It is important to remind the A/E Evaluation Board that the charrette is not being used to solicit a project design. In terms of schedule, the charrette is held on...
the day immediately following completion of the team interviews. Each lead designer-
A/E team is compensated for participating in the charrette, and project funds must be
allocated for this purpose.

The option to convene a charrette is determined before the project is first announced in
FedBizOpps. A charrette requires advance planning and coordination with the Office of
the Chief Architect Center for Design Excellence and the Arts. What follows is a summary
of critical elements in the charrette process.

PROFESSIONAL ADVISOR AND THE CHARRETTE JURY

The charrette is sponsored by the Office of the Chief Architect and is run by a professional
advisor in conjunction with, but independent of, the lead designer-A/E team interviews.
The services of a professional advisor are contracted and paid for by the Office of the
Chief Architect. Having a professional advisor is a mandatory element of the charrette
process. This individual is responsible for planning, organizing, and managing the charrette.
Specific duties include:

- Developing and advising on documents for the charrette process including announcements,
  rules, instructions, program information, and reports.
- Ensuring the integrity of the process and managing the charrette so all lead designer-
  A/E teams receive fair and equitable treatment.

These duties require that the professional advisor be capable of approaching the charrette
objectively with everyone’s welfare in mind. The advisor must have no personal or financial
interest in the project.

The Professional Advisor must be compensated for his or her services. The amount of
compensation will vary in accordance with the work required.
The results of the charrette are evaluated by an independent charrette jury. The jury is selected by the Office of the Chief Architect and will be appointed from GSA’s National Register of Peer Professionals. The model for the jury that has proven successful includes three members:

- A Design Educator
- An Architectural Critic
- A Practicing Architect Experienced in the Facility Type

The charrette jury is a pivotal advisory body to the A/E Evaluation Board. Once the charrette submissions are received by GSA and determined by the contracting officer and the professional advisor to be in compliance with all specified criteria, the jury meets to evaluate the submissions and rank them according to the criteria issued under the charrette rules. The jury evaluates the design concepts without knowledge of authorship. Only after the jury has completed its evaluation and ranking is the lead designer-A/E team associated with each submission revealed.

One of the jury members is appointed by the Office of the Chief Architect to serve as chair and works with the professional advisor to prepare the jury report. They must ascertain from fellow jurors the ranking as well as the reasons for such ranking. The report, with its ranking and evaluation, is delivered to the A/E Evaluation Board verbally by the jury chair and the professional advisor. How the chair and professional advisor convey this decision to the A/E Evaluation Board and articulates the jury’s thinking will have a major impact on the board’s final determination. The board will weigh the jury evaluation substantially (40%) and incorporate the jury ranking with the Stage II interview results to determine the A/E Evaluation Board’s final ranking of the lead designer-A/E teams.
RULES AND THE DESIGN PROGRAM

The professional advisor, in conjunction with the Office of the Chief Architect, is responsible for preparing written “rules” for the charrette. This includes an overview of the process, the schedule, submission requirements, maximum number of people on each team, allowable materials, and a summary of the evaluation criteria.

The advisor also prepares the charrette program. This is a written document with information on the site (which is never the actual project site), functional requirements including brief descriptions of their use and square footage, adjacency requirements, and any special considerations related to such elements as image and security.

Working with the Office of the Chief Architect, the professional advisor determines the location for the charrette. The GSA region covers general expenses related to holding the charrette (work rooms for each team and related support including the provision of boards for the mounting of each lead designer-A/E team’s final submission) and each team covers its own travel and lodging expenses.

To respond to questions, the Office of the Chief Architect will host a conference call prior to the charrette with the lead designer-A/E teams and the professional advisor.

When the charrette is over, the professional advisor and the contracting officer collect and store the schemes for the jury review the next day.

Examples of both the charrette rules and a charrette program are in the Resources and Sample Documents section of this chapter.
EVALUATING THE CHARRETTE SCHEMES
On the morning after the charrette, the charrette jury gathers at a meeting organized by the professional advisor for an orientation and then a review, discussion, and evaluation of the charrette schemes. The criteria for evaluation are those spelled out in the charrette rules. As previously stated, the evaluation is done without any knowledge of which lead designer-A/E team designed which scheme. Only after the evaluation is finalized and endorsed by the jury are the names of the lead designer-A/E teams revealed by opening the envelope attached to the back of each lead designer-A/E team’s submission.

That same day (generally in the early afternoon), in a verbal format, the jury chair and the professional advisor summarize the strengths and weaknesses and ranking of the charrette schemes for the A/E Evaluation Board. Clarifications and discussion can follow this presentation. The jury's charrette scheme ranking counts as 40% of the A/E Evaluation Board's Stage II ranking.

A/E EVALUATION BOARD FINAL RECOMMENDATION
After scoring the written submittals for Stage II, the interviews, and the charrette rankings, and appropriately combining these evaluations, the A/E Evaluation Board prepares a final ranking of the lead designer-A/E teams with supporting documentation and recommendations. The official record of this evaluation and the preferred lead designer-A/E team will be contained in a written report submitted to the GSA Selection Authority.

The GSA Selection Authority will review the A/E Evaluation Board report to assure the integrity of the selection process and ranking. The GSA Selection Authority will decide whether to accept the A/E Evaluation Board recommendation and select the recommended lead designer-A/E team. The Selection Authority reserves the right to reject the recommendation of the board or terminate the process without incurring any liability. If this happens, the GSA Selection Authority must document the reason(s) that the recommendation of the A/E Evaluation Board is overturned.
The selected lead designer-A/E team will receive a written request for a cost proposal from the GSA contracting officer. After the proposal is received, it will be evaluated and negotiations will be scheduled. In the event that GSA is unable, for any reason, to enter into an agreement with the selected lead designer-A/E team, GSA reserves the right to terminate discussion with the lead designer-A/E team without incurring any liability. GSA will then proceed to negotiate with the second ranked lead designer-A/E team.

6.8 Stage III—Vision Competition

A vision competition is held for GSA commissions where having a carefully developed “vision” for a project adds significant information to the lead designer-A/E team selection process. Like a charrette, the purpose of a vision competition is to get a sense of design strategies and each lead designer-A/E team’s approach to design problems. It is not to solicit a project design.

In terms of schedule, the vision competition adds 30 to 40 days to the lead designer-A/E team selection process. It also has important design budget implications as each lead designer-A/E team is compensated for participating. Project funds must be allocated for this purpose. The option to convene a vision competition is determined before the project is first announced in FedBizOpps. It requires significant advance planning and coordination with the Office of the Chief Architect’s Center for Design Excellence and the Arts.

These are critical elements in the vision competition process:

PROFESSIONAL ADVISOR AND THE VISION COMPETITION JURY

The vision competition is sponsored by the Office of the Chief Architect and must be managed by a professional advisor in conjunction with, but independent of, the lead designer-A/E team interviews. The selection of and fee for the services of a professional advisor is
contracted through the Office of the Chief Architect Center for Design Excellence and the Arts. This individual is responsible for planning, organizing, and managing the vision competition. Specific duties include:

- Developing and advising on documents for the vision competition process, including announcements, rules, instructions, project program information, and reports.
- Ensuring the integrity of the process and managing the vision competition so all lead designer-A/E teams receive fair and equitable treatment. This includes collaborating with the GSA project team to organize a vision competition briefing and follow-up question and answer period.

These duties require that the professional advisor be capable of approaching the vision competition objectively with everyone’s welfare in mind. The advisor must have no personal or financial interest in the project.

The results of the vision competition are evaluated by an independent vision competition jury. The jury is selected by the Office of the Chief Architect Center for Design Excellence and the Arts and is appointed from GSA’s National Register of Peer Professionals. The model for the jury that has proven successful includes three members:

- A Design Educator
- An Architectural Critic
- A Practicing Architect Experienced in the Facility Type

The vision competition jury is a pivotal advisory body to the A/E Evaluation Board. Once the vision competitions submissions are received by GSA and determined by the contracting officers and the professional advisor to be in compliance with all specified criteria, the jury meets for a day to evaluate the submissions and rank them according
to the criteria issued under the vision competition rules. The jury evaluates the design concepts without knowledge of authorship. Only after the jury has completed its evaluation and ranking is the lead designer-A/E team associated with each submission revealed.

One of the jury members is appointed by the Office of the Chief Architect to serve as chair and works with the professional advisor to prepare the jury report. The chair must ascertain from fellow jurors the ranking as well as the reasons for such ranking. The report, with its ranking and evaluation, is delivered verbally to the A/E Evaluation Board by the jury chair and the professional advisor. How they convey this result to the board and articulate the jury’s thinking will have a major impact on the board’s final determination. The board will weigh the jury evaluation substantially (40%) and incorporate the jury ranking with the Stage II interview results to determine the A/E Evaluation Board’s final ranking of the lead designer-A/E teams.

RULES AND THE DESIGN PROGRAM

The professional advisor, in conjunction with the Office of the Chief Architect, is responsible for preparing written rules for the vision competition. This includes an overview of the process, the schedule, submission requirements, allowable materials, and a summary of the evaluation criteria. One important requirement is a mandate that each lead designer-A/E team include an accurate cost estimate as part of its submission along with a statement assuring GSA that the vision could be constructed within the proposed budget. This must be submitted in a way that preserves the anonymity of the submission.

The professional advisor also prepares the vision competition program. This is a written document with information on the site, functional requirements including brief descriptions of their use and square footage, design priorities, adjacency requirements, and any special considerations related to such elements as image, preservation, and security.
An example a vision competition program is in the Resources and Sample Documents section of this chapter.

**BRIEFING**
Participating lead designer-A/E teams will meet the vision competition professional advisor and the GSA project team in an open session at the commencement of Stage III to review procedures, design guidelines, space program, site information, and other project-specific criteria. This session will be attended by representatives of each lead designer-A/E team, including the lead designer. The briefing will be held in the city where the facility is to be located. It will include presentations by the GSA project team, city officials, users, and other appropriate officials. The professional advisor and the GSA project team will respond to questions from participating lead designer-A/E teams.

A typical briefing agenda is in the Resources and Sample Documents section of this chapter.

**QUESTION AND ANSWER PERIOD**
During the first ten days following the Stage III briefing, participating lead designer-A/E teams will be able to submit written questions and requests for additional information to the GSA project manager. All questions received will be answered promptly, and written copies of all questions and answers will be sent simultaneously to each participating lead designer-A/E team. Anonymity of the source of questions will be maintained in the written responses.

**SUBMISSION REQUIREMENTS**
The lead designers and their A/E teams shall submit the following to fully satisfy the requirements of Stage III:
1. All materials shall be on one set of up to four 30-inch horizontal by 40-inch vertical presentation surfaces, mounted on rigid board. There shall be no indication of authorship on the presentation surfaces. The lead designer-A/E team shall be indicated in a sealed envelope attached securely to the back of one of the 30” x 40” boards.

2. No model is requested nor will it be accepted. Photos of study models or computer simulations may be attached to the surfaces as part of the graphic presentation.

3. The following drawings are mandatory and shall be included on the four surfaces. If desired, drawings may extend over more than one 30” x 40” surface.

**Plans**
- Illustrative Site Plan at 1:400 Scale, Color Rendered
- Floor Plans at 1:200 Scale, Black and White Rendered
- Ground Floor, Specifically Indicating the Entry, Lobby, and Security Checkpoint
- Typical Floor Plan

**Sections**
- Longitudinal, at 1:200 Scale, Black and White Rendered
- Latitudinal, at 1:200 Scale, Black and White Rendered

**Elevations**
- Entry (front) Elevation, at 1:100 Scale, Black and White Rendered
- Additional Elevation, at 1:100 Scale, Black and White Rendered

**Perspectives**
- Exterior from Street Level, Color Rendered
- Interior (Lobby View Preferable), Color Rendered
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Explanatory narrative and diagrams should be incorporated on the four surfaces. The narrative should be minimal but be sufficient for a reviewer to understand the fundamental principles of the design concept. The narratives or diagrams should illustrate, at a minimum, the following:

- Response to Community Context
- Proposed Circulation Systems
- Innovations or Design Elements Addressing Sustainable Design

If required for clarity, color may be utilized for any diagrams.

Graphics and narratives other than those mentioned may be included on the presentation surfaces at the discretion of the lead designer-A/E team as long as the mandatory drawings are included and the maximum number of presentation surfaces is not exceeded.

All four surfaces shall be wrapped and delivered to the contracting officer/professional advisor no later than 3:00 PM on the date set forth in the official schedule.

4 Submission of budget requirements must follow the requirements and format determined by the professional advisor in consultation with the project manager.

EVALUATING THE VISION COMPETITION SCHEMES
The purpose of the vision competition is to get a sense of design strategies and each lead designer-A/E team's approach to design problems. It is not to solicit a project design. When this stage is complete, the evaluation of the vision competition by the independent jury, as well as Stages I and II evaluations, will be used by the A/E Evaluation Board to prepare a ranking of Stage III lead designer-A/E teams.
A/E Teams have 30 days to prepare and submit their visions. Upon receipt, the GSA contracting officer and/or the professional advisor evaluate each Stage III submission to ensure compliance with all specified criteria. Only those submissions that, in the sole judgment of these individuals, meet all specified criteria are passed on to the independent jury.

On the day of the vision competition submission review, jury members gather for an orientation, site visit, review, discussion, and evaluation of the schemes. (A typical vision competition jury agenda is in the Resources and Sample Documents section of this chapter.) The criteria for the evaluation are those spelled out in the vision competition rules. As previously stated, the evaluation is done without knowing the authorship of submissions, ultimately leading to a ranking of the schemes. Only after the evaluation is finalized and endorsed by the jury are the names of the lead designer-A/E teams revealed. (A typical vision competition jury ranking form is in the Resources and Sample Documents section of this chapter.)

The jury chair and professional advisor verbally summarize the evaluation and ranking of the lead designer-A/E team vision competition schemes for the A/E Evaluation Board. Clarifications and discussion usually follow this presentation. The Stage III jury ranking must count as 40% of the A/E Evaluation Board’s final lead designer-A/E team ranking.

A/E EVALUATION BOARD FINAL RECOMMENDATION
After evaluating the written submittals for Stage II, the interviews, and the vision competition rankings, and appropriately combining these evaluations, the A/E Evaluation Board will prepare a final ranking of the lead designer-A/E teams with supporting documentation and recommendations. The official record of this evaluation and the preferred lead designer-A/E team will be contained in a written report submitted to the GSA Selection Authority.
The GSA Selection Authority will review the A/E Evaluation Board report to assure the integrity of the selection process and ranking. The GSA Selection Authority will decide whether to accept the A/E Evaluation Board recommendation and select the recommended lead designer-A/E team. The Selection Authority reserves the right to reject the recommendation of the Board or terminate the process without incurring any liability. If this happens, the GSA Selection Authority must document the reason(s) that the recommendation of the A/E Evaluation Board is overturned.

The selected lead designer-A/E team will receive a written request for a cost proposal from the GSA contracting officer. After the proposal is received, it will be evaluated and negotiations will be scheduled. In the event that GSA is unable, for any reason, to enter into an agreement with the selected lead designer-A/E team, GSA reserves the right to terminate discussion with the lead designer-A/E team, without incurring any liability. GSA will then proceed to negotiate with the second ranked lead designer-A/E team.

### 6.9 Contracting with the A/E Firm—Selected Issues

Once the lead designer-A/E team has been selected, these issues must be addressed in contractual negotiations:

#### Registration
As a member of the lead designer-A/E team, the “Architect of Record” must be licensed in the state where the facility is to be located. The required licenses must be in place at all times during the selection process, as well as throughout the completion of the project.

#### Models
The contract with the A/E firm must include language that assures GSA ownership of the concept presentation model.
Building Photographs
The contract must also include a requirement to secure and give GSA the rights to portfolio-quality interior and exterior photographs of the completed building.

Peer Roles
As highly regarded private-sector professionals with unique knowledge of their respective disciplines, the advice and insights of individuals on the GSA Public Buildings Service Commissioner’s National Register of Peer Professionals are invaluable to those responsible for a project. These individuals play several critical roles:

Educator
Several individuals involved in the lead designer-A/E team selection process are not architects or designers and usually are not familiar with design language or the evolutionary nature of the design process. By sharing their expertise and helping non-designers interpret design proposals and identify potential design options, the peers help facilitate a full, open, and constructive discussion to reach the best decision possible.

Advocate
With any significant public architectural project there exists a multitude of clients and users. Because of practical limitations, not all these clients can participate in the design review process. The peers, as objective experts, can help represent voices and issues not otherwise present. This could include being advocates for the physical environment of employees who will work in the facility, the urban and public context and the role of the federal presence within it, and the long-term ecological and environmental impacts of design decisions.
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Provocateur
As professionals, the peers have a responsibility to express openly and fairly their best judgments based on expert knowledge and extensive experience. As non-stakeholders, they are in a position to ask sensitive, but important, questions that GSA staff and customer representatives may be reluctant or unable to ask or examine. As individuals not intimately involved in the project, the peers help address misperceptions and hidden assumptions to ensure that all potential issues are fully explored and evaluated.

Consensus Builder
The peers, as neutral parties, can play a pivotal role in focusing the discussion and creating an environment that encourages everyone to speak. They can help build consensus on defining quality design and keep everyone focused on quality concerns. Peers, by training and experience, are able to synthesize various views and articulate the best choices when opinions differ.

Communicator
Lead designer-A/E team selection discussions can easily conclude with everyone having expressed opinions but nobody knowing what it all means. Often there is an imprecise consensus. The peers can help the group develop specific conclusions and leave the session with objectives, decisions, and concerns that can provide cogent insight, caution, and criteria for reaching a final decision.

Peers in the A/E Selection Process
Peers are deeply involved and essential to successfully selecting the most appropriate lead designer-A/E team.
AS A MEMBER OF THE A/E EVALUATION BOARD
The peer is the one outside voice in the selection process. In this non-partisan role, the peer can advocate consideration of lead designer-A/E teams of outstanding quality that are exploring design and environmental design strategies that others on the Board might be reluctant to champion. The peer can also offer insights on how emerging lead designers—complemented with a strong A/E team—can responsibly handle a GSA commission.

AS A JUROR FOR THE CHARRETTE OR VISION COMPETITION
A key issue for peers acting as jurors for GSA charrettes and vision competitions is to distill design strategies and priorities from the designs actually presented. GSA uses charrettes and vision competitions to discover creative approaches to problems rather than commit to a particular design solution. In their critique, jury peers can articulate this nuance and rank the submissions accordingly. The jury chair and professional advisor need to explain these subtle conclusions to the A/E Evaluation Board and respond to the board’s questions.

Once a lead designer-A/E team is under contract, peers (three per project) participate in the design development process as designer-to-designer critics in a minimum of two design reviews. This process is discussed in the next chapter of this publication.
Resources and Sample Documents

Sample Documents

Many sample documents are available as on-line Word files—go to:

http://insite.pbs.gsa.gov/PM/PMB/Design_Excellence_and_the_Arts

These Word documents can be used as templates by entering the requested information, shown as **COLORED BOLD TEXT IN CAPS**, and/or selecting and deleting other appropriate text, which generally have instructions in **COLORED BOLD CAPS**, with narrative options noted in non-bold colored text. Once the appropriate edits are complete, final documents can be high-lighted and reformatted entirely in black text.

**STAGE I AND STAGE II**

- Standard Form 330, Part II
- Sample Stage I Evaluation Sheet
- Sample Letter to Shortlisted Firms
- Sample FedBizOpps Announcement of Shortlisted Firms
- Sample Rejection Letter
- Sample Interview Letter
- Alternative Sample Interview Letter
- Sample Invitation to Networking Session
- Sample Stage II Interview Schedule
- Sample Stage II Interview and Charrette Schedule
- Sample Stage II Evaluation Sheet

**CHARRETTE**

- Sample Charrette Rules
- Sample Charrette Program
VISION COMPETITION
Sample Vision Competition Program
Sample Vision Competition Briefing Agenda
Sample Vision Competition Jury Agenda
Sample Vision Competition Jury Ranking Form

Sample FedBizOpps Announcement of Final Decision
### Strategies for Selecting the Lead Designer and the Design Excellence A/E Team

**Sample Standard Form 330, Part II**

See Chapter 5 Resources and Sample Documents for the complete Standard Form 330 and related Internet address.

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<thead>
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<th>ARCHITECT ENGINEER QUALIFICATIONS</th>
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<td><strong>PART II - GENERAL QUALIFICATIONS</strong></td>
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<td>2. STREET</td>
<td>6. DURING WORK</td>
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<table>
<thead>
<tr>
<th>14. AUTHORIZED REPRESENTATIVE</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>The foregoing is a statement of facts</td>
<td></td>
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</tbody>
</table>

**STANDARD FIRM 330 © 2000 PAGE 9**
Sample Stage I Evaluation Sheet

In using this sample Stage I Evaluation Sheet, the A/E Evaluation Board should work closely with the contracting officer to ensure accurate scoring and appropriate comments.

### A/E EVALUATION BOARD EVALUATION SHEET

**STAGE I – PORTFOLIO EVALUATIONS**

<table>
<thead>
<tr>
<th>Value</th>
<th>CATEGORY</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>35</td>
<td>DESIGN FIRM: PAST DESIGN PERFORMANCE</td>
<td></td>
<td></td>
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<td></td>
<td>Projects demonstrate creativity, clear design approach, and are sensitive to context.</td>
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<td></td>
<td>Projects have received design awards.</td>
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<td></td>
<td>Projects demonstrate understanding of client budget and program.</td>
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<td></td>
<td>Projects demonstrate special criteria called for by SDA.</td>
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<tr>
<td>25</td>
<td>PHILOSOPHY AND DESIGN INTENT</td>
<td></td>
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<td></td>
<td>Generally indicates flexible and imaginative attitude toward design within the constraints of various public and private projects.</td>
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<td>Specifically recognizes unique aspects of the project and indicates a way for good design to solve a critical problem.</td>
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<tr>
<td>25</td>
<td>LEAD DESIGNER’S PORTFOLIO</td>
<td></td>
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<td></td>
<td>Designs demonstrate innovative and creative approaches to solving functional program requirements.</td>
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<tr>
<td></td>
<td>Designs demonstrate a response to specific client requirements and criteria.</td>
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</tr>
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<td></td>
<td>Designs demonstrate a consistently high level of exploration, rigor, and personal commitment to design excellence.</td>
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</tr>
<tr>
<td></td>
<td>Projects demonstrate special criteria called for by SDA.</td>
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<tr>
<td>15</td>
<td>LEAD DESIGNER’S PROFILE</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Credentials are complete (education, work history, and all time periods registered).</td>
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<tr>
<td></td>
<td>Demonstrates a history of dedication to clients with complex building projects.</td>
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<td></td>
</tr>
</tbody>
</table>

Total Score

**COMMENTS**
Sample Letter to Shortlisted Firms

DATE

LEAD DESIGNER
DESIGN FIRM
ADDRESS
CITY, STATE, ZIP CODE

RE: Shortlist of Design Firms/Lead Designers on the PROJECT NAME

Dear LEAD DESIGNER:

Congratulations, you have been selected to be on the shortlist of lead designers and associated design firms and will continue to the next stage of the Design Excellence process: the selection of a lead designer-A/E team for the PROJECT NAME. The shortlist is enclosed and will be posted to INTERNET ADDRESS and the project web site URL.

We request that you have a knowledgeable representative(s) of your firm at the Networking Session for A/E’s and consultants to be held at LOCATION, TIME on DATE. Your representative(s) will be asked to make a brief presentation of your firm’s potential consulting opportunities for this project. The purpose of this session is to assist you in meeting the A/E team requirements for this project, including goals for small, women-owned, and small disadvantaged businesses. For an agenda and information on this session, please contact NAME at TELEPHONE NUMBER, FAX NUMBER, or EMAIL ADDRESS.

If you have any questions about the information provided, please contact me at TELEPHONE NUMBER, FAX NUMBER, or EMAIL ADDRESS. All debriefings will not occur until after DATE, when the lead designer-A/E team is selected. We will contact you separately concerning your Stage II submittal and interview.

Sincerely,

NAME
GSA Project Manager OR CONTRACTING OFFICER
Sample FedBizOpps Announcement of Shortlisted Firms

C — Design Services for the PROJECT in LOCATION

• Synopsis - DATE
• Modification 01 - DATE
• Modification 02 - DATE
• Pre-Submit Meeting 01 - DATE
• Pre-Submit Meeting Minutes and Sign-in Sheet 01 - DATE
• Modification 03 - DATE
• Modification 05 - DATE

General Information

Document Type: Modification to a Previous Presolicitation Notice
Solicitation Number: NUMBER
Posted Date: DATE
Original Response Date: DATE
Current Response Date: DATE
Original Archive Date: DATE
Current Archive Date: DATE
Classification Code: C — Architect and engineering services
Naics Code: 541310 — Architectural Services

Contracting Office Address
ADDRESS

Description
The following are the firms shortlisted for A/E services for the PROJECT in LOCATION

LIST ALL SHORTLISTED FIRMS:

FIRM NAME
LEAD DESIGNER
ADDRESS

Original Point of Contact
NAME, PHONE, EMAIL

Current Point of Contact
NAME, PHONE, EMAIL

Place of Performance
PROJECT LOCATION
Sample Rejection Letter

DATE
LEAD DESIGNER
DESIGN FIRM
ADDRESS
CITY, STATE, ZIP CODE

RE: PROJECT NAME

Dear LEAD DESIGNER:

Thank you for taking the time and effort to submit a portfolio for the PROJECT NAME. I regret to inform you that your firm was not selected to be on the shortlist of lead designers and associated design firms. The A/E Evaluation Board was rigorous in determining the shortlist of lead designers and associated design firms from among the NUMBER excellent portfolios submitted. If you are an in-state A/E or consultant, there is a possibility that you may be able to join an out-of-state lead designer and associated design firm that still needs to complete his/her A/E team to meet geographic A/E requirements, including goals for small, women-owned, and small disadvantaged businesses.

We are holding a Networking Session for A/E's and other consultants at LOCATION, TIME on DATE. The purpose of this session will be for shortlisted lead designers and associated design firms to make brief presentations of their firms' potential consulting opportunities for A/E's and consultants. For an agenda and information on this session, please contact NAME at TELEPHONE NUMBER, FAX NUMBER, or EMAIL ADDRESS. If you have any questions concerning the information provided, please contact me at TELEPHONE NUMBER, FAX NUMBER, or EMAIL ADDRESS. All information is posted to INTERNET ADDRESS and the project web site URL. All debriefings will not occur until after DATE, when the lead designer-A/E team is selected.

Sincerely,

NAME
GSA-Project Manager OR CONTRACTING OFFICER
DATE

LEAD DESIGNER
DESIGN FIRM
ADDRESS
CITY, STATE, ZIP CODE

RE: Supplemental Information for Stage II Lead Designer-A/E Team Interviews
in LOCATION on DATE

Submission Material
Prior to the scheduled Stage II interviews, each lead designer-A/E team is required to submit NUMBER copies of:

• Standard Form 330 documenting full lead designer-A/E team qualifications.
• Subcontracting plan that identifies small business, women-owned business, and small disadvantaged business status and state of origin for consultants or subcontractors.

Submissions are due no later than TIME, DATE to the CHOOSE ONE: GSA project manager OR contracting officer ADDRESS. No late submissions will be accepted unless the U.S. Postal Service postmarks them at least two days prior to the due date.

Interview Parameters
The following parameters for the interview process are established to ensure maximum utilization of the available time and to focus on responses to critical topics.

• Because of time limitations and the need to focus on critical issues, the lead designer-A/E team’s representation may not exceed five individuals: lead designer (attendance mandatory), associated architect (if proposed, attendance mandatory), project manager, two team members (attendance optional). The optional positions should only be used if the lead designer-A/E team wants to make specific points that are unique to its team. Attendance and presentations by optional positions should contribute substantially to the profile.

• The interview process is intended to evoke a response to the critical design objectives and the lead designer-A/E team’s approach to manage and deliver the program successfully. The lead designer-A/E team’s presentation should respond to the enclosed Stage II evaluation criteria recognizing the interview time constraints.

• Presentation aids should be limited to a graphic presentation using boards or projected images. The lead designer-A/E team must provide its own easels and/or
Strategies for Selecting the Lead Designer and the Design Excellence A/E Team

Sample Interview Letter  page 2

projectors as required. Supplementary handouts that expand upon information covered in the presentation are NOT allowed. An outline or reduced format copies of presentation materials should be distributed to the five-member A/E Evaluation Board. Since the interview schedule is very structured, strict adherence to the time allotment is mandatory. The setup and breakdown of presentation aids should be simple to ensure the best use of the presentation time.

Interview: Issues (Reference to evaluation criteria in italics)
There are several issues that must be addressed by the team. They will be the crucial factors in determining the lead designer-A/E team’s philosophy and commitment to this project.

THE FOLLOWING IS A RECOMMENDED LIST RELATIVE TO A COURTHOUSE PROJECT. IT SHOULD BE MODIFIED TO SUIT THE PARTICULAR PROJECT TYPE.

1. Community Context
(Past Performance on Design, Lead Designer’s Portfolio, Philosophy and Design Intent)
The courthouse is an integral part of the urban fabric. The courthouse should be designed to contribute to the community and be compatible with its context. The lead designer-A/E team must demonstrate familiarity with the local context and demonstrate past work that indicates its ability to design within a context.

2. Design Image
(Past Performance on Design, Lead Designer’s Portfolio, Philosophy and Design Intent)
A courthouse must reflect the dignity and permanence of the court through its massing, shape, and materials. It should enhance the city where it is located, serving as an inspiration for architecture within that area. It should lend civic pride, strength, and vitality suitable to the courts. Attention should also be given to the expression and integration of the fine arts in response to the Art in Architecture Program.

The lead designer-A/E team must demonstrate its knowledge and commitment to this issue. It should show from past projects that project leaders understand how to create a building addressing symbolic issues and the design methodology used in such an undertaking. Past project examples must be projects from the lead designer-A/E team’s portfolios.

3. Courthouse Functional Requirements
(Past Performance on Design, Lead Designer’s Portfolio, Philosophy and Design Intent)
With ever-increasing technology, the courthouse must function efficiently, responding to critical program parameters. Specific care must be taken with regard to security, plan organization, adjacencies, and spatial issues. In addressing this topic, the lead designer-A/E team should demonstrate a basic knowledge of courthouse functions.
and security systems, and show how it is qualified to master a program of this complexity and sensitivity.

4. Sustainable Design
(Past Performance on Design and/or Proposed Methodology in Achieving Sustainable Design)
The government has a commitment to sustainable design and LEED certification. Public buildings need to be at the forefront of sensitivity to the environment and set an example for private-sector buildings. The lead designer-A/E team should address the issue of sustainable design as it pertains to this project and its past work. Areas to be specifically addressed include energy efficiency, indoor air quality, environmental safety, materials recycling, water use/conservation, and construction waste management.

5. Team
(Team Organization and Management, Geographic Location)
To provide the best possible service to the client, the lead designer-A/E team must have the ability to work as a cohesive, efficient, communicative whole. The lead designer-A/E team should demonstrate how it will organize the work, integrate client input, and manage the design and documentation of the courthouse in a timely and cost-effective manner.

6. Commitment of Lead Designer
(Individual or Design Team)
GSA's Design Excellence Program is setting a new standard in design for public buildings. This program can only be successful with a primary commitment of time and energy from the lead designer. The lead designer-A/E team must indicate:

- A process where the lead designer plays a substantive leadership role.
- A quality control methodology for the design.
- A primary commitment from the lead designer to this project.

Location and Schedule
The lead designer-A/E team interviews will take place at the GSA regional office at ADDRESS. The entry/exit time for your lead designer-A/E team is TIME, DATE. The presentation is limited to 45 minutes followed by a question and answer period of 30 minutes. The remaining 15 minutes will be allocated to introductions, set-up/break-down of presentation aids, and final comments.

IF THERE IS A STAGE II CHARRETTE, INCLUDE THIS TEXT AND THE "Charrette Information" DETAILS NOTED BELOW:

The interview evaluation criteria and information provided in the complete Standard Form 330 will account for 60 percent of the overall Stage II ranking. The design charrette will account for the remaining 40 percent of the overall lead designer-A/E team ranking. The purpose of the design charrette is to further evaluate the design merits of each lead designer-A/E team’s “vision”. The design charrette results will be calculated as part of the Stage II rankings in the final evaluation of the lead designer-A/E team. The design
charrette results will be evaluated by a jury of GSA national peers. The evaluation criteria to be used by the jury shall include: INSERT APPROPRIATE CRITERIA—EXAMPLE: community context, architectural strategy and image, courthouse functionality, and sustainable design.

Charrette Information
A one-day charrette for all short-listed firms will be held on DATE in CITY. The following limited information is available at this time:

• DATE, pre-charrette packages will be e-mailed to lead designer-A/E teams.
• DATE, question and answer tele-conference.
• DATE, e-mail question and answer responses.
• The design problem will be a INSERT BUILDING TYPE—EXAMPLE: a federal courthouse.
• The charrette program and site will NOT be the actual site or program.
• The charrette is being run by a professional advisor to GSA.
• A competition jury, composed of representatives from the GSA Public Buildings Service Commissioner’s National Register of Peer Professionals, will evaluate the charrette designs.
• The charrette schedule is from 7:00 am to 7:00 pm.
• Set-up time will be allowed the prior evening.
• Each charrette team may have up to four individual members. The lead designer must be one of the four.
• Travel arrangements are at the expense of each of the lead designer-A/E teams shortlisted for Stage II.

IF THERE IS NO CHARRETTE BUT THIS IS A THREE-STAGE SELECTION PROCESS, ADD THE FOLLOWING PARAGRAPH:

Stage II Shortlist Notification
GSA will notify the lead designer-A/E team whether it has or has not been selected to advance to Stage III by DATE. The list will be released and posted to the project web site URL and INTERNET ADDRESS on the same date.

If you have any questions about the information provided, please contact me at TELEPHONE NUMBER, FAX NUMBER, or EMAIL ADDRESS. All information is posted to the INTERNET ADDRESS and the project web site URL. All debriefings will not occur until after DATE, when the selection process is complete.

Sincerely,

NAME
GSA Project Manager OR CONTRACTING OFFICER
DATE

LEAD DESIGNER
DESIGN FIRM
ADDRESS
CITY, STATE, ZIP CODE

Subject: Architect-Engineer Design Services
PROJECT NAME
Solicitation ENTER NUMBER

Dear NAME:

Submission Material
Prior to the scheduled Stage II interviews, each lead designer-A/E team is required to submit NUMBER copies of:

• Standard Form 330 documenting full lead designer-A/E team qualifications.
• Subcontracting plan that identifies small business, women-owned business, and small disadvantaged business status and state of origin for consultants or subcontractors.

Submissions are due no later than TIME, DATE to the CHOOSE ONE: GSA project manager OR contracting officer: ADDRESS. No late submissions will be accepted unless the U.S. Postal Service postmarks them at least two days prior to the due date.

Location and Schedule
The lead designer-A/E team interviews will take place at the GSA regional office ADDRESS. The entry/exit time for your lead designer-A/E team is TIME, DATE.

Interview Parameters
The following parameters for the interview process are established to ensure maximum utilization of the available time and to focus on responses to critical topics.

• Although GSA will not limit the number of attendees from your team, we take this opportunity to stress the importance of participation by those individuals who will be involved in day-to-day processes and interaction during the design of this project. It is suggested that at a minimum the lead designer, associated architect (if one is proposed), and the project manager, mechanical engineer, and structural engineer be in attendance.
Strategies for Selecting the Lead Designer and the Design Excellence A/E Team

### Alternative Sample Interview Letter page 2

- The interview process is intended to evoke a response to the critical design objectives and the lead designer-A/E team’s approach to manage and deliver the program successfully. The presentation is limited to 45 minutes followed by a question and answer period of 45 minutes. Ten minutes prior to and ten minutes afterwards will be allocated to introductions, set-up/break-down of presentation aids, and final comments.

- The lead designer-A/E team’s presentation should respond to the enclosed Stage II evaluation criteria recognizing the interview time constraints. The interview evaluation criteria as listed below (1-4) must be addressed by the team during the presentation. They will be the crucial factors in evaluating the lead designer-A/E team’s Stage II proposal, as well as determining its philosophy and commitment to this project. Presentation aids should be limited to a graphic presentation using boards or projected images. The lead designer-A/E team must provide its own easels and/or projectors as required. Supplementary handouts that expand upon the information covered in the presentation are NOT allowed. An outline or reduced format copies of presentation materials should be distributed to the five-member A/E Evaluation Board. Since the interview schedule is very structured, strict adherence to the time allotment is mandatory.

- The setup and breakdown of presentation aids should be simple to ensure the best use of presentation time.

### Interview Evaluation Criteria

1. **Team Design Performance (50%)**
   Lead designer-A/E teams must address issues of historical context, design image, and function as they have been approached on past projects. The presentation of this factor shall draw similarities to the scope and complexity of this project. The proposed lead designer-A/E team should demonstrate it can work together successfully.

2. **Team Organization and Management Plan (30%)**
   The management plan shall clearly identify key roles and lines of communication, and shall present the means to integrate client, community, and—when required—preservation input. The plan should explain steps to ensure cost and quality control, as well as identify all review stages. Lastly, the plans should identify the physical location of major design and production work, the coordination plan for consultant work, and for work produced in remote offices.

3. **Professional Qualifications (15%)**
   The lead designer-A/E team project manager, lead designer and engineers should demonstrate that they have the qualifications, experience, and commitment to organize all efforts required for this project. The lead designer-A/E team must indicate:
   - A process where the lead designer plays a substantive leadership role.
   - A quality control methodology for the design.
   - A primary commitment from the lead designer to this project.
4. Geographic Location (5%)
The lead designer-A/E team must demonstrate capability to perform 35% of the contract effort within **INDICATE LIMITS BY RADIUS, STATE OR OTHER CRITERIA**.

**IF THERE IS NO STAGE II CHARRETTE, INCLUDE THIS TEXT:**

The interview evaluation criteria and information provided in the complete Standard Form 330 will account for the overall firm ranking.

**IF THERE IS A STAGE II CHARRETTE, INCLUDE THIS TEXT AND THE “Charrette Information” DETAILS NOTED BELOW:**

The interview evaluation criteria and information provided in the complete Standard Form 330 will account for 60 percent of the overall Stage II ranking. The design charrette will account for the remaining 40 percent of the overall lead designer-A/E team ranking. The purpose of the design charrette is to further evaluate the design merits of each lead designer-A/E team’s “vision”. The design charrette results will be calculated as part of the Stage II rankings in the final evaluation of the lead designer-A/E team. The design charrette results will be evaluated by a jury of GSA national peers. The evaluation criteria to be used by the jury shall include: **INSERT APPROPRIATE CRITERIA—EXAMPLE: community context, architectural strategy and image, courthouse functionality, and sustainable design.**

**Charrette Information**

A one-day charrette for all short-listed firms will be held on **DATE** in **CITY**. The following limited information is available at this time:

- **DATE**, pre-charrette packages will be e-mailed to lead designer-A/E teams.
- **DATE**, question and answer tele-conference.
- **DATE**, e-mail question and answer responses.
- The design problem will be a **INSERT BUILDING TYPE—EXAMPLE:** a federal courthouse.
- The charrette program and site will NOT be the actual site or program.
- The charrette is being run by a professional advisor to GSA.
- A competition jury, composed of representatives from the GSA Public Buildings Service Commissioner’s National Register of Peer Professionals, will evaluate the charrette designs.
- The schedule is from 7:00 am to 7:00 pm.
- Set-up time will be allowed the prior evening.
- Each charrette team may have up to four individual members. The lead designer must be one of the four.
- Travel arrangements are at the expense of each lead designer-A/E teams shortlisted for Stage II.
IF THERE IS NO CHARRETTE BUT THIS IS A THREE-STAGE SELECTION PROCESS, ADD THE FOLLOWING PARAGRAPH:

Stage II Shortlist Notification
GSA will notify the lead designer-A/E team whether it has or has not been selected to advance to Stage III by DATE. The list will be released and posted to the project website URL and INTERNET ADDRESS on the same date.

GSA appreciates your efforts in submitting on this project and we look forward to your Stage II presentations. INCLUDE THIS INFORMATION: GSA is also taking this opportunity to provide an enclosure with contact information from STATE’S OR REGION’S small business website for small business firms. GSA is in no way endorsing any firm and is acting as a neutral party by passing this information onto you. Should you have any questions regarding the services these firms provide, please contact them directly.

If you have any questions about the information provided, please contact me at TELEPHONE NUMBER, FAX NUMBER, or EMAIL ADDRESS.

Sincerely,

NAME
GSA Project Manager OR CONTRACTING OFFICER
Sample Invitation to Networking Session

You Are Invited To Attend a
Networking Session for A/E Design Services

PROJECT NAME
LOCATION

Small, women-owned, and small disadvantaged businesses are encouraged to attend.

DATE
TIME
LOCATION

The purpose of this session is to provide a networking opportunity for small, women-owned, and small disadvantaged businesses as well as others to meet with the key designers and their proposed production firms for potential teaming opportunities for A/E design services on PROJECT NAME in LOCATION. This session is intended to assist the shortlisted firms meet the established minimum goals for subcontracting.

For registration, please fax or e-mail your response to NAME, Project Manager, at FAX NUMBER or email: ADDRESS
Strategies for Selecting the Lead Designer and the Design Excellence A/E Team

Sample Stage II Interview Schedule

A/E Evaluation Board Agenda and Short-Listed Interview Schedule

<table>
<thead>
<tr>
<th>DATE</th>
<th>Activity Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00</td>
<td>Evaluate Team Submissions: Standard Form 330 and Stage II Submission Materials</td>
</tr>
<tr>
<td>10:30</td>
<td>Review Interview Process and Strategy</td>
</tr>
<tr>
<td>11:00</td>
<td>Interview #1</td>
</tr>
<tr>
<td>12:30</td>
<td>Interview #1 Complete—Individual Board Members Evaluate</td>
</tr>
<tr>
<td>1:00</td>
<td>Lunch</td>
</tr>
<tr>
<td>2:00</td>
<td>Interview #2</td>
</tr>
<tr>
<td>3:30</td>
<td>Interview #2 Complete—Individual Board Members Evaluate</td>
</tr>
<tr>
<td>4:00</td>
<td>Interview #3</td>
</tr>
<tr>
<td>5:30</td>
<td>Interview #3 Complete—Individual Board Members Evaluate</td>
</tr>
<tr>
<td>8:00</td>
<td>Interview #4</td>
</tr>
<tr>
<td>9:30</td>
<td>Interview #4 Complete—Individual Board Members Evaluate</td>
</tr>
<tr>
<td>10:00</td>
<td>Interview #5</td>
</tr>
<tr>
<td>11:30</td>
<td>Interview #5 Complete—Individual Board Members Evaluate</td>
</tr>
<tr>
<td>12:00</td>
<td>Lunch</td>
</tr>
</tbody>
</table>
SELECT APPROPRIATE SCENARIO:

TWO STAGE PROCESS—NO CHARRETTE
1:30  Board Reconvenes
   • Discussion of Individual Board Member’s Evaluations and Ranking
   • Individuals Refine Scoring as Appropriate
   • Calculation of Final Ranking with Supporting Documentation
5:00  Board Adjourns

OR

THREE-STAGE PROCESS
1:30  Board Reconvenes
   • Discussion of Individual Board Member’s Evaluations and Ranking
   • Individuals Refine Scoring as Appropriate
   • Determination of Shortlist to Proceed to Vision Competition
5:00  Board Adjourns
Strategies for Selecting the Lead Designer and the Design Excellence A/E Team

Sample Stage II Interview and Charrette Schedule

A/E Evaluation Board Agenda and Short-Listed Interview and Charrette Schedule

<table>
<thead>
<tr>
<th>DATE</th>
<th>Time</th>
<th>Event Description</th>
</tr>
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<tr>
<td></td>
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<td>Lunch</td>
</tr>
<tr>
<td></td>
<td>1:30</td>
<td>Interview #1</td>
</tr>
<tr>
<td></td>
<td>3:00</td>
<td>Interview #1 Complete—Individual Board Members Evaluate</td>
</tr>
<tr>
<td></td>
<td>3:30</td>
<td>Interview #2</td>
</tr>
<tr>
<td></td>
<td>5:00</td>
<td>Interview #2 Complete—Individual Board Members Evaluate</td>
</tr>
<tr>
<td></td>
<td>8:00</td>
<td>Interview #3</td>
</tr>
<tr>
<td></td>
<td>9:30</td>
<td>Interview #3 Complete—Individual Board Members Evaluate</td>
</tr>
<tr>
<td></td>
<td>10:00</td>
<td>Interview #4</td>
</tr>
<tr>
<td></td>
<td>11:30</td>
<td>Interview #4 Complete—Individual Board Members Evaluate</td>
</tr>
<tr>
<td></td>
<td>12:00</td>
<td>Lunch</td>
</tr>
<tr>
<td></td>
<td>1:30</td>
<td>Interview #5</td>
</tr>
<tr>
<td></td>
<td>3:00</td>
<td>Interview #5 Complete—Individual Board Members Evaluate</td>
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<tr>
<td></td>
<td>3:30</td>
<td>Interview #6</td>
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<tr>
<td></td>
<td>5:00</td>
<td>Interview #6 Complete—Individual Board Members Evaluate</td>
</tr>
</tbody>
</table>
**DATE—ALL DAY**

7:00 Charrette

**DATE—SECOND DAY AFTER LAST INTERVIEW**

9:00 Jury Evaluates and Ranks Charrette Submissions

12:00 Lunch

1:00 Board Reconvenes
  - Discussion of Individual Board Member’s Interview Evaluations and Ranking
  - Jury Chair and Professional Advisor Reports to Board on Charrette Jury Comments and Ranking
  - Individuals Refine Scoring as Appropriate
  - Calculation of Final Ranking with Supporting Documentation

4:30 Board Adjourns
Sample Stage II Evaluation Sheet

In using this sample Stage II Evaluation Sheet, the A/E Evaluation Board should work closely with the contracting officer to ensure accurate scoring and appropriate comments.

<table>
<thead>
<tr>
<th>Value</th>
<th>CRITICAL ELEMENT</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>50</td>
<td>TEAM DESIGN PERFORMANCE</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td>Projects demonstrate success in addressing issues of community context, design image, function, and sustainability.</td>
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<td>Project examples are similar in complexity to project.</td>
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<td>Proposed A/E Team demonstrates it can work together successfully.</td>
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<td></td>
<td>Commitment of lead designer</td>
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<td></td>
<td>Projects demonstrate special criteria called for by ESA.</td>
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<tr>
<td>30</td>
<td>TEAM ORGANIZATION AND MANAGEMENT PLAN</td>
<td></td>
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<td></td>
<td>Plan clearly identifies key roles and lines of communication. It presents the means to integrate client and community input.</td>
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<td>Plan explains steps to ensure cost and quality control, as well as identifies all review stages.</td>
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<td>Plan identifies the physical location of major design and production work, the coordination plan for consultant work, and for work performed in remote offices.</td>
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<tr>
<td>15</td>
<td>PROFESSIONAL QUALIFICATIONS</td>
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<td></td>
<td>The lead designer and A/E team project manager have the qualifications, experiences, and commitment to execute all efforts required for this project.</td>
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<tr>
<td></td>
<td>Projects demonstrate special criteria called for by ESA.</td>
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<tr>
<td>6</td>
<td>GEOGRAPHIC LOCATION</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>The lead designer-A/E team satisfies published geographic limitations.</td>
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</tbody>
</table>

**Total Score**
MEMORANDUM
PRE-CHARRETTE INFORMATION PACKAGE
Toledo Federal Courthouse Design Charrette

Date: DATE

To: SHORTLIST FIRM NAMES
ADDRESS
CONTACT
CONTACT INFORMATION INCLUDING EMAIL

From: NAME
Professional Advisor to GSA
CONTACT INFORMATION INCLUDING EMAIL

1. Summary of Process
The U.S. General Services Administration has completed Stage I of the Architect/Engineer Selection process for the new Toledo Federal Courthouse and has shortlisted five firms to proceed to Stage II.

Following formal interviews of the shortlisted firms by the A/E Evaluation Board, the selected lead designer-A/E teams are asked to participate in a design charrette to develop a conceptual “vision” that responds to the charrette program, site, and stated design criteria. At the completion of the one-day charrette, each team’s vision will be submitted anonymously on 30” x 40” presentation boards. The boards will be evaluated and ranked by a jury appointed by GSA’s Chief Architect, and composed of independent design professionals and distinguished architecture educators and critics selected from the GSA Public Buildings Service Commissioner’s National Register of Peer Professionals. The evaluation and ranking will be provided to the A/E Evaluation Board by the jury chair and the professional advisor.

The A/E Evaluation Board will integrate the findings of the jury with the Stage II interview evaluation to develop an overall final ranking for recommendation to the GSA Selection Authority. After completion of the A/E selection process, images generated by the charrette may be published and publicly distributed by GSA.

The purpose of the design charrette is to investigate conceptual visions generated in a single day as opposed to actual specific architectural designs developed with client input over a multi-month period. Accordingly, the charrette program and site will differ significantly from those for the actual Toledo Courthouse project, and it can be assumed that visions generated during the charrette will not necessarily be directly applicable to the real courthouse project.
2. Sponsor and Authority
The GSA PBS Office of the Chief Architect is the sponsor for this design charrette competition. This project is a Design Excellence project.

3. Professional Advisor
NAME of AFFILIATION has been appointed by GSA to serve as a consultant in the capacity of professional advisor for this design charrette competition. He/She is responsible for advising on the competition program, helping GSA develop the competition rules and procedures, and organizing and managing the competition.

4. Charrette Competition Jury
The jury is charged with the responsibility of reviewing and evaluating the competition submissions. The names of the members of the jury will not be disclosed until after completion of the A/E selection process.

5. Charrette Schedule
The charrette will be held DATE at the LOCATION in Toledo, Ohio. The following is the schedule for the charrette:

**DATE** 7:00 pm
All team members will convene in Salon C in the LOCATION conference facility for an informal briefing by members of the Toledo Planning Commission who will give a brief overview of the history and future plans for the city.

7:30 pm
Firms will gain access to their respective charrette rooms for the purpose of setting up tables, chairs, and drawing equipment prior to the next day charrette start.

8:30 pm
Completion of team room setup. ADVISOR NAME will lock and secure each room.

**DATE** 7:00 am
“Coffee/Danish” will be available in Salon C in the LOCATION conference facility.

7:30 am
Orientation meeting will start promptly in Salon C with opening comments by GSA. ADVISOR NAME will review charrette rules, distribute charrette program, reveal the site, and distribute base drawings and site photographs. Attendance of all charrette participants is mandatory. Following the session, the teams will visit the site that has been chosen for the charrette. If necessary, GSA will provide transportation to and from the site.
8:30 am
Teams visit the site.

9:30 am
Teams return from site visit, are given access to charrette rooms, and the charrette begins.

12:30 pm
Box lunch is available for pickup in pre-function foyer.

3:30 pm
**ADVISOR NAME** will informally review developing submissions for general compliance with charrette rules.

7:00 pm
Teams hand in their submission boards to the professional advisor and GSA official in the pre-function foyer.

6. Charrette Program
The design charrette courthouse program which will be used for the purpose of this charrette will vary from the actual program for the new Toledo Courthouse. Participants will receive a copy of the design charrette program two weeks prior to the charrette. All square foot areas and number of rooms will have been deleted from this transmitted copy to discourage pre-charrette design activity. The full program including all areas and number of rooms will be provided to firms at the commencement of the charrette.

Although no specific budget will be provided for the charrette program, it is to be assumed that vision schemes will be appropriate to the typical level of budget for federal courthouse projects.

The charrette program will be the sole design criteria for the charrette problem.

7. Submission Requirements
Competitors must follow the outlined submission requirements. Because there will be no team presentation opportunity to the jury, it is important that the “vision” and submitted work are easily understood by a reading of the submitted boards. The presentation should clearly show and emphasize the principal urban design, organization, and architectural ideas, rather than attempt to address and resolve in detail all the building’s internal function and technical issues.

A. The following items are the minimum drawing requirements to be submitted:

- Context plan and diagrams to convey how the design vision relates to the surrounding city and context.

- Self-explanatory plans, sections, elevations, and image drawings as required to convey the design vision to the jury.
B. All program functions are to be shown as monolithic space blocks except as subdivided in the program. The courtroom block must show the relationship between the courtroom and the ancillary functions.

C. All public, secured, restricted, and service circulation between the space blocks must be shown. The submissions must show the full route for each system from point of origin to final destination.

D. Lobby must show location of the security checkpoint including queuing area.

E. All material shall be securely mounted on four 30” x 40” boards supplied by GSA. Drawings are permitted to extend from one board to another if necessary or desired. All boards are to be oriented identically. Submission of models is not allowed, although two-dimensional representations of models may be affixed to boards.

F. A 1” x 30” title block, supplied by GSA, is to be affixed at an edge of each board. Competitors are to fill in “drawing ___ of ___” in each title block. This will serve to indicate the team’s preferred arrangement of the boards to the jury.

G. Do not indicate authorship on the presentation surfaces. The lead designer-A/E team is to be identified in the GSA supplied sealed envelope attached securely to the back of one of the boards.

H. Explanatory narrative, notes and diagrams should be incorporated on the board surfaces, not separately. Any narrative should be minimal and concise but sufficient for a reviewer to understand the fundamental principles of the concept and vision.

8. Additional Charrette Rules

A. General

Each team can be composed of up to four individual members. The lead designer must be one of the four, and no substitutions may be made for any team member over the course of the charrette day. All four people must be part of the proposed design team, although with the exception of the lead designer, they need not be the same individuals appearing at the lead designer-A/E team’s interview. Team members may include consultants proposed for the project.

All team members are required to be present at the charrette location beginning at the 7:30 am orientation meeting through the charrette completion at 7:00 pm. No team member is to leave the charrette location until after completion of the competition, and no one other than team members may be in the charrette area during charrette hours.
B. Items Allowed to be Used During Charrette

No pre-prepared, written, drawn, published, or other similar materials may be brought into the charrette rooms at any time over the course of the charrette. Only blank papers and materials may be brought into the rooms.

No computers or handheld devices with computer functions are allowed. Cell phones are allowed. There are no “outside line” telephones in the charrette rooms, although public pay phones are located nearby.

No copier machines are allowed to be brought in for the charrette. There will be a copier machine available for use at the hotel’s front desk (same floor as charrette rooms). This is an over-the-counter facility. Copies may be billed to the hotel’s master GSA account. In the event that more than one team wishes to use the service at the same time, a consecutive five-minute limit per team will be enforced. Only a team member may use the copying facility and teams are not allowed to use reproduction graphic facilities other than the front-desk copier.

The following materials may be brought into the charrette rooms by the firms:

• All supplies, paper, materials, and equipment required to develop the design vision and to convey the design to the jury.
• In addition, a variety of architectural and engineer scales, adjustable triangles, and a metal straight edge and cutting blade for trimming paper are recommended.
• The firms are to bring their own parallel bars and drawing boards. Each team charrette room will contain six 30” x 72” tables and six “banquet” chairs. There are several electrical outlets in each room, but no extension cords will be provided.

C. Pre-shipping of Materials

Firms may wish to ship items ahead of time for convenience. Items received by the hotel will be placed in the charrette room area at 6:30 pm on DAY, DATE.

Altro: NAME
General Service Administration (deliver to charrette rooms by 6:30 PM DATE) LOCATION ADDRESS

D. Base Drawings and Materials

GSA will provide base drawings (at appropriate scales) for the charrette site. These will include plans, elevations, and sections of existing conditions. In addition, photographs of existing and surrounding areas will be provided to each team.
Each team will receive four 30" x 40" foam core boards for mounting submission drawings. An additional foam core board will be provided for use as a cutting surface. Teams are not required to use all four boards in their final submission. Method and materials for mounting on the boards are the responsibility of the teams.

E. Miscellaneous

- The charrette will be in English measurement (not metric).
- Teams may work in model form over the course of the day. However, three-dimensional models may not be part of the final submission.

9. Evaluation Criteria
The jury will judge the submissions according to the following criteria:

A. Relationship to Context (25%)
B. Architectural Strategy and Image (40%)
C. Functionality (25%)
D. Sustainable Design (10%)

Note: The evaluation weighting percentages given above are general guidelines for the jury. Consistent with the stated goals, design criteria, and programmatic requirements for the charrette, the jury reserves the right to vary these weights.

10. Ranking and Report to the Jury
The jury selected by GSA will convene on **DAY, DATE** to review the competitor’s submissions. After evaluating and discussing the respective schemes/visions, and based on the general evaluation criteria, the jury will rank each submission.

The chair of the jury and the professional advisor will deliver an oral report on the findings to the GSA A/E Evaluation Board. This report will discuss the jury’s findings, conclusions, and recommendations. A final determination by the GSA Selection Authority of the preferred lead designer-A/E team is expected by **MONTH**.

11. Compensation
Each team participating in and completing the charrette shall receive a fee for services of **AMOUNT**. Further information regarding this will be available from GSA.
Sample Charrette Program

I. Background
Currently, the Toledo District Court and court-related activities are housed in the existing United States Courthouse located on the Civic Mall. The existing federal complex does not meet the U.S. Marshals Service’s security standards, nor does it provide expansion space for future court requirements. To accommodate the steady growth of the judiciary, the government will be building a new courthouse that will house the District Court, as well as the district clerk, circuit library, U.S. Marshal Service, and the U.S. Attorney. For the purposes of this charrette, the facility will accommodate (*) district courtrooms and chambers.

The design goals for the new courthouse include the creation of a strong visual civic presence that projects the dignity of the courts and conveys the symbolic presence of the federal government. In addition, enhancement of the urban fabric is to be considered.

II. Site (Reserved)

III. Summary of Program Functions

<table>
<thead>
<tr>
<th>Function</th>
<th>Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. U.S. District Courtroom &amp; Auxiliary Facilities</td>
<td>*</td>
</tr>
<tr>
<td>B. Judges Chambers</td>
<td>*</td>
</tr>
<tr>
<td>C. Court Library</td>
<td>*</td>
</tr>
<tr>
<td>D. Clerk of the District Court</td>
<td>*</td>
</tr>
<tr>
<td>E. JUDGMENT ASSEMBLY</td>
<td>*</td>
</tr>
<tr>
<td>F. U.S. Marshal Office &amp; Cellblock</td>
<td>*</td>
</tr>
<tr>
<td>G. U.S. Attorneys</td>
<td>*</td>
</tr>
<tr>
<td>H. Grand Jury Suite</td>
<td>*</td>
</tr>
<tr>
<td>I. U.S. Probation Office</td>
<td>*</td>
</tr>
<tr>
<td>J. Probation Services</td>
<td>*</td>
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</tbody>
</table>

Mother
### Building Support Areas

<table>
<thead>
<tr>
<th>Area</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>K. Public Lobby</td>
<td>*</td>
</tr>
<tr>
<td>L. Loading Dock/Storage</td>
<td>*</td>
</tr>
<tr>
<td>M. Mechanical Electrical Room</td>
<td>*</td>
</tr>
<tr>
<td>N. Floor Common Areas</td>
<td>*</td>
</tr>
<tr>
<td>Public Restrooms, Vertical Chases, Fire Stairs, Elevators &amp; Upper Plaza Lobbies, (Miscellaneous Building Crossing Distributed through Building)</td>
<td></td>
</tr>
<tr>
<td>O. Subfloor Building Excluding Parking</td>
<td>*</td>
</tr>
</tbody>
</table>

**TOTAL BUILDING W/ PARKING**

* Numbers and square footage to be provided at commencement of charrette.

## IV. Description of Program Functions

### A. District Courtrooms (Includes auxiliary functions)

- Jury trials for both civil and criminal cases and other court proceedings are conducted in District courtrooms. The courtroom requires direct access from public, restricted, and secure circulation. Auxiliary spaces adjacent to the courtroom include:
  - Attorney/firefighter conference rooms accessed from public circulation
  - Trial jury suite accessed directly from the courtroom or restricted circulation
  - Court reporter offices
  - Deputy Clerk offices
  - Prisoner/holding cells accessed from secure circulation system
  - Miscellaneous storage

The courtrooms have 10-foot ceiling heights and must not contain interior columns. See diagram B for more detailed description of the diagrammatic relationships between courtroom and related auxiliary functions.

### R. Judge’s Chambers

Judge’s chambers may be located close to a courtroom or clustered in a separate area. Chambers are accessed from restricted circulation with convenient access to the courtroom(s). The chambers serve as the judge’s primary office, and are comprised of a series of functions. For the purposes of this exercise, assume the function as a monolithic block of space.

### C. Court Libraries

The library provides research resources to the judiciary. The location of court libraries must provide access for judges, law clerks, and other court staff by means of a restricted staff corridor. In addition, public access must also be provided.
D. Clerk of the District Court: The Clerk of the District Court is the primary administrative officer of the District Court. The office is responsible for administrative matters such as notices, fee collection, jury management, and record storage serving the court. This is the office with the highest public traffic. It also must have easy access to the restricted judge’s circulation route. This function is divided into three areas:

- Public service counter with four attendants
- General office/administration area
- File and storage area

E. Jury Assembly: The jury assembly area is where prospective jurors are processed and assembled prior to being sent to specific courtrooms for further selection, or actual trial service. Jury assembly facilities must be located on a main public entry floor, preferably close to the USDC Clerk’s Office. The facilities must have controlled entry and provide convenient movement of jurors to and from courtrooms. To accommodate media, the jury assembly room must have access to a controlled smoking area.

F. USMS Offices, Central Cellblock, Holding Cells, and Sallyport: The US Marshals’ operation is divided into four areas:

- USMS office: These offices serve the administrative support for the U.S. Marshals. They are accessed directly from the public corridor via a controlled checkpoint.
- USMS sallyport: The sallyport is the only prisoner transport entry point into the courthouse. It must be a reception bay capable of accommodating a small bus in a secured environment. Immediately adjacent to the sallyport is a secured elevator to transport the escorted prisoners to the central holding block. (Elevator is not required if cellblock is adjacent to sallyport.)
- Control cellblock: Prisoners are transported from the sallyport to the central cellblock, where prisoners await judicial proceedings. For the purposes of this exercise, the cellblock is to be shown as an ( ) SF space block.
- Courtroom holding cells: Prisoners are transported to the courtroom for their trials via a secured prisoner elevator. They are held adjacent to the courtroom in a holding cell. The area to accommodate this need is in the courtroom allowance.

G. U.S. Attorneys: The U.S. Attorneys represent the U.S. government in legal matters. Access to their office area is through a controlled lobby that is accessed from the public circulation route.

H. Grand Jury Suite: This area serves as a forum for the U.S. Attorneys to present evidence to a jury for obtaining indictments against the government’s targeted suspects. This function should be located near the U.S. Attorneys’ offices and must be accessible from both the public and the secured prisoner circulation routes. The provision for the secured route is for the transport of witnesses in custody.

I. U.S. Probation Office: Requires access from public circulation after the security screening area in the lobby. If the office operates during off-hours, separate controlled off-hours access is desirable.

J. Pretrial Services: This office requires access from public circulation after the security screening area in the lobby. In addition, the office requires access to the USMS cellblock area.
Strategies for Selecting
the Lead Designer and the Design Excellence A/E Team

Sample Charrette Program page 4

Building Support Areas

K. Public Lobby: This area provides the primary public interior image of the courthouse. It must convey the solemnity and soberity of the American judicial process. Functionally, it serves as the only public entry point into the building through the USMIS security screening point, which includes walk-through metal detectors. Provision must be made for adequate space for the security process. The lobby serves as the first level of integration into other functions in the courthouse. It serves the primary elevator bank to the upper public floors. Public elevators are to be 6' x 8'. The number is up to the design team based on the geometry of the design solution.

L. Service Areas: A building service area requires loading docks with direct restricted entry. Two bays capable of accommodating tractor trailers must be provided. Balance of areas not utilized for the loading operation and transport to freight elevators will be utilized for long-term court storage. Easy access to the freight elevator is required.

M. Mechanical/Electrical Rooms: A mechanical/electrical/equipment room is to be provided to house chillers, boilers, panel boards, and other equipment. Vertical chases to provide adequate M/E/P services on upper floors are to be provided. Not included in this allowance are the electrical and telephone risers located in upper floors. These smaller areas are covered in the general grossing of the building.

N. Floor Common Areas: The function consists of all building support spaces necessary per floor. Each floor must have appropriate public circulation including elevator lobbies. Each floor must provide public restrooms suitable for the occupancy of the building. Each floor must provide appropriate electrical and telecommunication closets. Each floor must provide required fire egress system.

O. Parking: The parking structure is entered through a secured manned entry gate and is divided into three separate areas:

- Judges secured parking. This area must be accessed through a remote controlled interior gate. It must have direct access to the restricted judges’ elevator that will take the judges to their chambers.
- USMIS Law Enforcement vehicle: This area does not require a separate interior gate, but it must have direct access to the prison elevator for restricted access to the USMIS office and lock areas.
- Staff parking: This area is strictly for staff. Public parking is not permitted.

V. Courthouse Primary Organizational Structure

A. Circulation Systems: Federal courthouses must accommodate four separate and distinct circulation systems that must be fully isolated from each other. The only place all four intersect is in the trial courtroom. The four systems are:
1. General Public: The general public enters the building through a security checkpoint at the primary public entry that feeds into a public vertical circulation core. This core takes the public to primary destinations: the courtrooms and the jury assembly area.

2. Judges' Restricted Route: The judge enters the building through a restricted parking structure with the confines of the building. From this restricted area, they have access to a restricted elevator system that transports them to their chambers and courtrooms. The chambers, courtrooms, and the Clerk of the Court offices must be connected via a restricted elevator circulation system.

3. Prisoners' Restricted Route: Prisoners are brought into the building in the custody of the U.S. Marshals via a secured sallyport. This sallyport is typically in the building's parking area or an area fully separated from all other building areas. The sallyport is connected to a secured elevator system that transports the escorted prisoner to a central cell block area adjacent to the U.S. Marshals offices. Prisoners are held in the central cell block area until they are called to the courtroom for proceedings. A dedicated elevator system transports the prisoner to a holding cell adjacent to the courtroom. The U.S. Marshals central cell block area is adjacent to a restricted and controlled attorney interview room. The grand jury suite should be accessible by the secured elevator system.

4. Service: Supply and waste enter and leave the building through the loading dock and are transported via the freight elevator.

Circulation/Adjoining Diagram A.
Strategies for Selecting the Lead Designer and the Design Excellence A/E Team

Sample Charrette Program  page 6

B. Courthouse/Chamber Block. Understanding the relationship between the courtroom and other building elements is critical to organizing the floor plate. The diagram below shows the courtroom, chambers and related ancillary facilities:

VI. Security Requirements
- Building must be setback from the street (curb line) at least 50 feet on all sides.

VII. Submission Requirements
- All program functions are to be shown as monolithic space blocks except as subdivided in the program. The courtroom block must show the relationship between the courtroom and the ancillary functions.
- All public, secured, roofed, and service corridors between the space blocks must be shown. The submission must show the full route for each system from point of origin to final destination.
- Lobby must show location of security checkpoint including spacing area.
- Context plans and diagrams to convey how the design vision relates to the surrounding city and context.
- Self-explanatory plans, sections, elevations, and image drawings as required to convey the design vision to the jury.
STAGE III DESIGN PROGRAM
FOR VISION COMPETITION ONLY

THIS PROGRAM DOES NOT CONTAIN A REQUEST FOR CONFIRMATION
OF THE DESIGN BUDGET. THIS REQUEST—AND THE MECHANISM TO
FULFILL IT—WOULD HAVE TO BE ADDED. ALL BUDGET CONFIRMATIONS
SHOULD REMAIN ANONYMOUS UNTIL AFTER THE COMPETITION IS
JURIED.

Summary
The Mobile area is growing steadily economically, in population, in employment, and in
requirements upon the federal judiciary. The existing John A. Campbell courthouse does
not have the space available to meet the needs of the court. The court family has been
fragmented into separated buildings. They are currently operating with significant space
deficits in physical facilities that will not accommodate growth. The existing courthouse
is historically significant, profitable, and should be retained for the use of the courts.
However, it does not meet the size, security, and circulation requirements of the court.
The continued projected growth of the courts requires that additional space be provided.

This design program will provide background information and support for the consolidation
of the U.S. District Court for the Southern District of Alabama, and several court-related
agencies in a new U.S. Courthouse in Mobile, Alabama. The co-location of these
agencies will provide expansion space, operation efficiency, maximum security, and
convenience to the courts-related agencies and the public.

The center of court activity in the Southern District of Alabama is the John A. Campbell
Courthouse located at 113 St. Joseph Street. The facility is federally owned and contains a
total of 6,080.54 usable square meters (sm) or 65,450 usable square feet (sf). The District
Court occupies almost the entire facility. The remainder of the courts family is dispersed
among six leased buildings in the downtown area occupying over 4,180.66 sm (45,000 sf).

The U.S. General Services Administration Region 4 is proposing federal construction to
provide for the 10-year expansion requirements of the courts, and court-related agencies.
The project also considers the provision of the 30-year expansion requirements, as needed.

Description of the Proposed Building
The proposed new courthouse will contain 20,719 sm (223,025 sf) of office, storage and
special space, plus approximately 1,858 sm (20,000 sf) of secured inside parking for 50
vehicles. Secured separate vertical circulation will be provided for judges and prisoners
with secured separate horizontal circulation to courts and U.S. Marshals Service facilities.

The building will include ten courtrooms and chambers. The courthouse’s courtrooms
will consist of six District courtrooms, and four Magistrate courtrooms. Separate outside
parking is proposed to provide 50 parking spaces at approximately 1,858 sm (20,000 sf).
The estimated gross square footage for the courthouse is 30,234 gsm (325,452 gsf).
It is further proposed that the new courthouse be built in coordination with the operation of the existing John A. Campbell Courthouse. The existing courthouse would be used to house the Bankruptcy courts, bankruptcy administrator, and the housing of two senior District judges. This arrangement would provide space for the entire courts family to be co-located in government owned space, and allow the new facility to be smaller in scale.

Project Background
In May of 1993, a planning team of court and court-related representatives developed the Long Range Facility Plan for the Southern District of Alabama. The purpose of the plan was to provide an analysis of the comprehensive facility needs for the District. This plan included the input of the entire court family, the Administrative Office of the Courts, GSA, and the Space and Facility Committee of the Judicial Conference. The historical data developed in the Long Range Facility Plan accurately reflects the experience of the Southern District and there is no reason to think that the court will not expand commensurate with the assumptions made in the plan.

The planning team members agreed that the John A. Campbell Courthouse is currently out of space. At the current complement of nine judicial officers there is not space for additional chambers, courtrooms, or support personnel space. There is not enough expansion room in the courthouse to house the growth of the District Court, Circuit Court, and U.S. Marshals Services over the next ten years. The projected growth for these court functions shows them at a space deficit of over 4,750.72 sm (51,136 sf) should they remain in the building for the ten year period described in the plan.

The courthouse was constructed in 1932, and has inadequate security systems. There is no separate access to the courthouse for either judicial officers or prisoners. There are no secure private corridors for access to courtrooms, chambers or Marshal’s areas, and no secure elevators. There are no holding cells contiguous to the courtrooms. The parking garage that is attached to the rear of the courthouse is open to pedestrians and only secured from vehicles by a “lifting arm” gate at entry and exit.

All other divisions of the court and court-related family have already been fragmented to other buildings in downtown Mobile. At the time of the planning study, it was estimated that the court family was at a space deficit of 2,863 sm (30,824 sf).

In summary, the court family is operating with significant space deficits in deficient physical facilities. The long range plan projects a total growth of the court family of 121.3 percent over the thirty year period described in the plan. That growth would include eight additional judges as well as the increases in the support and related functions.
Site
The proposed site consists of two city blocks which lie within the core area of downtown Mobile, Alabama. They lie immediately north of the existing U.S. courthouse. The site, consisting of 3.68 acres is bounded by St. Anthony Street on the north, St. Joseph Street on the east, St. Louis Street on the south, and N. Joachim Street on the west; with Conception Street separating the two blocks. These are all one-way streets. At present, traffic cannot circulate around the entire property due to the direction of traffic flow on these streets.

Block 3
This part of the proposed site covers one city block and is 97.5 linear meters (320 linear feet) east-west, by 76.2 linear meters (250 linear feet) north-south, or 1.83 acres. There are seven parcels, 94-100, on the site with varied dimensions and ownership. There is one structure on the site that is occupied by businesses. It has been altered significantly and does not appear to have any historic or architectural significance. It would be demolished for development of the site. Surface parking on the site is currently used by Alabama Power employees.

Block 3A
This part of the proposed site covers one city block and is 82.3 linear meters (270 linear feet) east-west, by 76.2 linear meters (250 linear feet) north-south, or 1.56 acres. There are six parcels, 101-106, on the site with varied dimensions and ownership. There are two structures on the site, which are both occupied by businesses. One is a house at 157-159 Conception Street built in 1852. It is currently used for professional office space. It is both historically and architecturally significant structure and could not be demolished but might be moved. The other structure is mostly warehouse which houses a maritime supply business and is not significant; it would be demolished.

Conception Street
The street is an important north/south pedestrian and vehicular street. It spans 50 feet from property line to property line and is approximately .29 acres. It contains most utilities including a major storm water system and not only sanitary and water supply pipes but the 36" sanitary sewer main line that runs south.

Historic District
The site represents the southeast side and border of the DeTonti Square Historic District. It encompasses the northwest corner of block 3 and the north border of block 3 and Conception Street fronting on St. Anthony Street. Any development of the site must be sensitive to the character, scale, and relationship to the district and its appearance.

The slope of the site is less than 3 percent. Site elevation is 11 to 12 feet above sea level.

The soil type throughout the downtown core area is a composite known as Urban Soil. In general, Urban Soil is of sufficient strength to support the proposed development. The exact depth of the water table beneath the site is not known. However, the site is located two blocks from the Mobile River, so the water table is likely very close to the ground surface.
The proposed project area is classified by the Federal Emergency Management Agency (FEMA) as falling within a 100-year flood zone (A-8 classification, Flood Insurance Rate Map). The area may also fall within a floodway.

All utilities are available at the site, as well as fire, police, and municipal government services provided by the city of Mobile.

GENERAL BUILDING REQUIREMENTS

Size
- 28,277 gross square meters (305,452 gross square feet) without parking
- Approximately 1,858 square meters (20,000 square feet) for fifty (50) interior secure parking spaces
- Fifty (50) exterior parking spaces

Cost
The estimated construction cost range is $60 to $70 million.

Housing Plan: Major Tenants
The space requirements utilized to develop the general building size, geometry, occupant loading and required supporting utility, safety and security systems is based on occupant data summarized in this section.

The occupant data listing was developed following consultation with U.S. courts representatives and GSA and is based on a comprehensive plan developed in 1997. It provides for 10-year and 30-year projection of U.S. courts and court support services needs in the Mobile, Alabama, area that are programmed to be housed in the new courthouse facility.

The square meter (sm) and square foot (sf) figures listed for each occupant category are useable area (usm) (usf) and include additional factors for private internal circulation and support services that are specific to the tenant function but do not include factors for public circulation, building functional support, or general mechanical or electrical equipment area which are listed separately.

A more detailed listing of separate rooms is provided as Attachment I to this program.

Courtroom Configuration
10-year occupancy:
- Ten (10) courtrooms total
- Six (6) District courtrooms
- Four (4) Magistrate courtrooms

It is projected that there will be a total of 14 courtrooms needed for 30-year growth of the facility.
30-year occupancy:
• Fourteen (14) courtrooms total
• Nine (9) District courtrooms
• Five (5) Magistrate courtrooms

Expansion Provisions
Spatial and functional expansion requirements necessary for the U.S. courts and court
related agencies for 30-year expansion has been provided.

Building
Design should address the 10-year and 30-year requirements as presented in the
program. Size of areas in program takes precedent over areas defined in Facilities
Standards for the Public Buildings Service (P100) or the U.S. Court Design Guide
(USCDG). Requirements in USCDG takes precedent over P100 for court spaces.

Site
Design should encompass all of site including development of the two blocks and the
street. Only the house situated on lot 101 in block 3A would not be demolished to
accommodate development of the site. Design should provide for its use, renovation or
removal from the site.

Design should encompass use or non-use of Conception Street. The city would like to
keep the cityscape and street pattern intact if possible, however, closing the street to
vehicular and/or pedestrian traffic can be incorporated. The street would have to be
government owned and utilities within street would have to be relocated if closed to
both vehicular and pedestrian traffic even if no structures are constructed on the street.
If only closed to vehicular traffic, utilities could remain in a right-of-way. The budget
presently does not include relocation of the utilities and the government encourages
a creative solution to this constraint rather than simple relocation of the utilities.

The use and development of ‘green’ spaces on the site is encouraged by both the
government and the city.

Expansion
Accommodating expansion of the building for 30-year growth must be presented as part
of the design competition. Expansion should be presented as horizontal additions,
annexes, or separate structures and not expansion or vertical additions to the initial new
facility. GSA policy restricts expansion options to horizontal schemes so that the costs
for structural enhancements to achieve later reconfigurations do not burden the current
budget.
PROJECT GOALS AND OBJECTIVES

The purpose of this section of the program is to relate the general project construction goals with their related project objectives so the lead designer-A/E team can ascertain the impact of each goal by understanding the performance objectives to be attained. The lead designer-A/E team is required to implement the specific project design so that the overall performance objectives are satisfied. All design shall be in full compliance with applicable codes and regulations. If codes conflict, the more stringent code shall prevail.

The following goals and objectives include all project requirements that define the U.S. courts and GSA program expectations for the design and construction of the new courthouse.

General Goals
1. Provide a safe, efficient, flexible, comfortable, and healthy environment for the performance of all U.S. courts and supporting federal agency missions.
2. Provide a facility that is sensitive to the art and architecture of the region, has architectural merit, and conveys a community presence.

Building Image
Goals: The building must project an image of solidity, stability, and progressiveness befitting the image of the courts and court-related tenant agencies.

Objectives: The new courthouse should be one that enhances the professionalism and productivity of its workers. It should be of an appropriate design to reflect an elegant and dignified image. The building should blend with the environment and relate to the community but present itself distinctively as a courthouse. It should respect and enhance the historic nature of the existing John A. Campbell Courthouse. Its appearance, functioning, and siting should be coordinated with the existing building and designed in such a way as to create the look of a unified courts complex.

The facility must provide a civic presence and contribute to the architecture of the total community.

Accountability Questions: By GSA review, does the building project the appropriate appearance for federal activities? By court review, does the building project the appropriate appearance for judicial activities? Does the building project the appearance of a professional organization? Does the building respect its context and development within the cityscape? Does the new facility respect and enhance the historic nature of the existing John A. Campbell Courthouse? Is the building and relationship to the existing building designed in such a way as to create the look of a unified courts complex?

Space Allocation
Goals: The purpose of this project is to provide for the 10-year expansion requirements, staffing, and functional requirements of the courts and court-related agencies. The 30-year expansion will be provided by expansion of the facility on the same site to...
accommodate increased trial requirements. The project will alleviate overcrowding, correct deficiencies, and relocate court-related functions from leased space.

Objectives: Building and space layout design will adhere to the USCDG, P100, U.S. Marshals Handbook, and the New Pricing Policy Guidelines including measurement of space. The space design in the building will allow for interfunctional alignment of court elements, provide security, prisoner transfer, and separate public circulation.

Accountability Questions: Are space allocations for the courts consistent with the USCDG? Does the space allocation for the courts-related agencies meet the established space allocation standards? Is the actual utilization rate for the court-related agencies in accordance with P100 and the New Pricing Policy? Does the building design provide the proper relationship of secure and public circulation, and alignment of court elements? Is there room on the site to accommodate the 30 year expansion needs of the court family?

Security

Goals: This project shall be designed to provide protection to federal employees as well as persons involved in court proceedings or conducting business in the general office areas. All physical, acoustical and electronic security measures shall be in accordance with data references and coordinated with the user agency and their designated personnel. HVAC, power, fire detection/suppression, telephones, and the building automation systems shall be a part of these requirements. Security checkpoint stations shall be included with spatial allocations and integrated into the design to present a dignified presence.

Objectives: This building should follow the guidelines of a Level IV facility as defined in the U.S. Department of Justice document Vulnerability Assessment of Federal Facilities dated June 28, 1995. The building will follow the guidelines of P100 and as set out in the ISC Security Design Criteria document dated May 28, 2001. The building and site must meet the minimum security requirements as proposed in the aforementioned documents. Court security shall follow the guidelines set forth in the USCDG and U.S. Marshals Handbook. Security must be provided for normal and crisis situations. Security systems shall meet the special requirements of the occupants. Security measures shall be based on the recommendations of a specific building risk assessment.

Security devices or infrastructure elements designed into the building structure and systems shall include the following:
1. Building siting and setback with physical barriers and exterior surface materials appropriate to protect the building structure and its occupants against ballistic or blast attack.
2. Vehicle access control on the site and pedestrian control at the building entrances.
4. Secure vehicle and building pedestrian sallyports, a dedicated elevator, detention cells, isolated secure corridors and monitoring equipment for isolation of persons in the custody of the U.S. Marshals Service.
5. Dedicated, separate and restricted corridors and a dedicated elevator for judges' safe movement within the building.
6. Screening of all people entering the building as well as all mail, parcels, and delivered material.
7. Perimeter building security protection provided by a system of enhanced building and site lighting, and closed circuit television cameras, and recording and monitoring devices.

Accountability Questions: Do the security measures adhere to those set forth in the USCDG? By professional review, does the security meet all foreseeable situations? Does the facility meet the security standards as set forth by the Department of Justice report Vulnerability Assessment of Federal Facilities? Does the facility meet the security system requirements of the individual tenant agencies as described by their security standards documents?

Fire, Life Safety
Goals: This project shall be designed and built to provide for the safety and security of its occupants.


Emergency power generator equipment shall be provided with battery back-up systems so that power for emergency building egress, emergency lighting, fire alarms and detention systems, and building and site security equipment is maintained at all times. Stand-by power equipment with uninterruptible power sources (UPS) shall be provided to allow a scheduled shut down or downloading of all building computers in a power outage in order to protect programs and data files.

Accountability Questions: By GSA technical staff review, do the drawings and specifications meet the standards of NFPA 101, and P100? Are space allocations for the courts consistent with lifesafety requirements? Is an acceptable exit time achieved?

Accessibility
Goals: This project shall be designed to ensure that physically handicapped persons will have ready access to, and use of, the project facilities, in accordance with the Uniform Federal Accessibility Standards (UFAS) and the Americans with Disabilities Act (ADA).

These requirements include access to courtrooms, judge’s benches, jury boxes, jury areas, and witness stands.

Objectives: The project will ensure that the design will meet the most stringent standard whether it be UFAS or Title II and Title III of the ADA as well as the other applicable design criteria set forth in the design directives. The project will provide horizontal and vertical circulation that meets requirements for complete accessibility by the handicapped persons. As a minimum, at least one accessible route within the boundary of the site shall be provided for both the public and employees from public transportation
stops, accessible passenger loading zones, and public streets or sidewalks to the accessible building entrance they serve.

Accountability Questions: Through design review, has the design met all the criteria as set forth in the design directives? Through dimension review, can a person in a wheelchair achieve all of the various scenarios indicated in the objective? Is access provided to all of the required locations in the courtrooms, and jury areas?

National Policies
Goals: Provide a facility that incorporates GSA's policies relative to energy goals, sustainable design, commissioning, design excellence, construction practices, and innovative technologies.

Objectives: Building systems shall meet all policy criteria indicated in the P100.
1. The building shall meet and hopefully exceed the energy goal established for this project.
2. The building must be designed to meet the LEED "certified level" and have a goal to achieve at least a "silver level" rating.
3. The design should incorporate a commissioning plan that goes from the planning stage through design, construction, and occupancy.
4. The selection of the design team and subsequent design processes will follow the guidelines set forth in Design Excellence: Policies and Procedures.
5. The construction of the facility shall use "best practices" to allow project to be successful in the eyes of all participants including, GSA, tenant agencies, the courts, the A/E, the construction contractor, the municipality, the general public, as well as any other group impacted by its development.
6. Proven advanced technologies for all building features and systems shall be actively sought during the design process. Such features shall be presented to GSA for review with accompanying life-cycle cost analysis, implementation costs, and listed advantages and disadvantages.
7. Critical systems and features that may benefit from evolving technologies include, but are not necessarily limited to, the following:
   a. Exterior wall and glazing materials.
   b. Security and monitoring equipment.
   c. Audiovisual systems for courtrooms.
   d. Mechanical equipment and systems.
   e. Electrical equipment and systems.
   f. Telecommunication systems, including fiber optics.
   g. Building automation and energy management systems.
   h. Lighting systems including daylighting.
   i. Gray water recirculation from lavatories to water closets and urinals.

Accountability Questions: By independent A/E review, does the building meet the criteria of the guidelines stated in the objective above? Has the LEED goal been exceeded and has the project achieved a LEED "silver rating"? Is the project considered a success by all participants? Have "best practices" and innovative technologies been incorporated in the design and construction of the facility?
Strategies for Selecting the Lead Designer and the Design Excellence A/E Team

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Metric Design
Goals: This project shall be designed and built entirely in metric to meet the federal government’s commitment for conversion to metric system as the preferred system of weights and measures for U.S. trade and commerce.

Objectives: Project design shall insure that all drawings and specifications be prepared using metric units in accordance with the guidelines set forth in the Metric Guide for Federal Construction and the Metric Design Guide PBS-PQ260.

Accountability Questions: By GSA technical staff review, are all the drawings and specifications prepared using metric units and are they of such completeness and clarity that the bidding for construction of the building can proceed cost effectively without major problems? Are the drawings prepared in accordance with the guidelines set forth in PBS-PQ260?

Historic Compatibility
The building will be located in a historic area of Mobile, in close proximity to other buildings of historical significance. The new building should respect and enhance the historic nature of the buildings surrounding the site.

Goals: This project shall be designed and built to respect and represent the architectural and cultural history of the Mobile area.

Objectives: The new building and site should respect and enhance the historic nature of the buildings surrounding the site, and most importantly the existing John A. Campbell Courthouse.

Accountability Questions: By GSA staff review, is the building design compatible with the historical buildings in close proximity to the site? Does the building design respect and represent both the architectural and cultural history of the Mobile area? Does the building related well to the existing John A. Campbell courthouse, maintaining its important stature in the Mobile community?

Building Flexibility
Goals: This project shall be designed and built to allow for change, reconfiguration, and adaptation to expansion, new technologies, changes in procedures, and growth.

Objectives:
1. Space flexibility is provided for possible future courtroom and associated court function expansion by providing floor-to-floor heights, floor loading and column spacing on “non-court” floors equivalent to designated “court” floors.
2. The design and installation of horizontal and vertical data processing, telecommunications and other automation systems shall maximize straight runs and adjacencies to like spaces and end users to enhance space flexibility and convertibility.

Accountability Questions: By GSA staff review, does the building both in layout and building systems design provide for change and reconfiguration with the minimum of negative impact and cost?
Optimum Workplace Performance and Productivity

Goals: The project shall be designed to provide an environment that will reinforce the functioning and processes of the tenant agencies.

Objectives: Building systems shall meet all criteria indicated in the USCDG and P100. Additionally, the building systems should meet special design criteria as set forth in the tenant agency requirements.

1. Building systems that support U.S. courts operations shall be reliable by concept, modular by construction, and designed to accommodate the varied and flexible occupancy schedules of this specialized facility in a manner that maintains comfort and health in an efficient manner.

2. It is anticipated that systems furniture will be incorporated into the office area layouts. Approximately 20% of the programmed usable office space in the building is defined as "open office." This "open office" area will contain systems furniture with features such as sound absorbing and color coordinated surfaces, and power, telephone, data, and network interface features necessary for maximum occupant productivity.

3. Building tenant systems will incorporate automation as required to enhance the agency mission and will include audio/visual interface in courtrooms and interface of security, fire alarm, and building infrastructure systems. The flexibility of these systems and telecommunications and power systems shall include modular, vertically stacked equipment rooms.

4. Space utilization rates for the various agencies and departments are within published U.S. courts and GSA guidelines for anticipated circulation, dedicated and secure (or restricted) access for court personnel and marshals, open and closed office area configuration concepts and multiple floor factors, and include space for dedicated HVAC systems, elevators, and stairs.

5. Movement of materials within the building, including delivered goods, furnishings and waste shall be accomplished in a safe and efficient manner that does not hinder the normal flow of building occupants and the public. Properly designed ramping, loading docks and platforms, trash rooms, and maintenance and repair shops shall be provided.

6. A separate and dedicated freight elevator shall be provided for material and maintenance activity movement within the building.

7. It is imperative that acoustic controls and isolation be provided for all U.S. court spaces, tenant agency boundaries, government/public boundaries, and all U.S. Marshals Service boundaries.

8. All noise generating mechanical and electrical equipment shall be located remote from the occupied spaces; all transmitted noise shall be filtered or dampened; and an acoustical consultant shall be retained during design to guarantee that acoustic levels and isolation are within acceptable levels.

Accountability Questions: By independent A/E review, do the building systems and layout meet the criteria of the guidelines stated in the objective above? Has special consideration been given to computer room system requirements? Has special consideration been given automation systems and the provision of raised access flooring and underfloor access duct systems as required throughout the building?
Building System Energy Efficiency

Goals: This project shall be designed to ensure that the building systems meet the special design criteria of tenant agencies and provide maximum energy efficiency.

Objectives: Building systems shall meet all criteria indicated in the USCDG and P100. Additionally, the building systems should meet special design criteria as set forth in the tenant agency requirements.

1. The building shall meet and hopefully exceed the energy goal established for this project.
2. All building systems shall be designed and specified so as to satisfy U.S. courts and GSA standards for ventilation, temperature control and energy efficiency, while employing life-cycle cost justified technologies for systems flexibility and annual building energy budget levels not in excess of published maximum values.
3. Energy efficiency shall be optimized by applying for and obtaining all electric utility company rebates that provide an overall life-cycle and asset management advantage while conforming to all published standards related to the design.
4. The successful compliance with all design, construction, and post-construction elements of the GSA project commissioning process will assure energy efficiency by confirming that systems operation comply with design and energy expectations.
5. Based on the magnitude, flexibility and complexity of the environmental and power systems required for this building, it is recommended that a computerized Direct Digital Control System (DDC) be provided. This system will control occupancy schedules, temperature control and energy usage as well as schedule maintenance protocols, troubleshoot system failures and integrate emergency power back up systems for life safety, computer, and security systems.

Accountability Questions: By independent A/E review, do the building systems meet the criteria of the guidelines stated in the objective above? Has the energy goal been exceeded, enhancing the project’s goal in achieving a LEED “silver rating”?

Structural Integrity, Durability, and Maintainability

Goals: The project shall be designed ensure that the building structural systems meet the special design criteria of tenant agencies and provide maximum longevity for the facility. The building shall meet the special requirement of a structure constructed in this specific region of the country with respect to soil, seismic, wind and weather conditions.

Objectives:

1. All structural and non-structural elements and components will be designed and specified to comply with applicable codes and regulations for the specific seismic zone.
2. The building foundation and substructure shall be designed considering the site specific soils conditions, climate, and ground water table data.
3. All building materials and systems shall be designed and specified to have a “usable life,” or extended warranty protection, for a period of not less than 20 years.
Accountability Questions: By independent A/E review, do the building structural systems meet the criteria of the guidelines stated in the objective above?

SPECIAL REQUIREMENTS

As a part of the A/E space planning and design, the following special space requirements, included as part of this PDS concept and associated construction cost, shall be evaluated and refined as required for a complete and integrated project design.

Special Security

Countermeasures shall be provided as required to comply with vulnerability assessment Level IV protection of the building, its occupants and the public, including building siting and setbacks, guarded, gated and monitored vehicular and pedestrian access, selected ballistic and selected non operable windows, CCTV perimeter monitoring and recording systems, and enhanced exterior lighting. Special security shall be provided for judges by the provision of secure, covered parking, dedicated secure vertical elevator transport and horizontal corridors. Special security and isolation shall be provided for segregation of persons in the U.S. Marshals Service custody from all other building occupants by providing a vehicle secure sallyport, restricted corridors, restricted elevator and detention cells. Designated U.S. courts and U.S. Marshals personnel shall be provided with special secure indoor parking.

Special Fire Safety Systems

In addition to standard fire alarm and sprinkler systems throughout the building, special smoke removal air systems shall be provided for all courtrooms.

Special Telecommunications Needs

Above-standard telephone line quality as well as a dedicated telecommunications switchroom of 300 SF (28 SM) size for building systems shall be provided as well as telex and data internet lines revised to monitor integrated and safe and secure communications between this building and all regional and national security, law enforcement and judicial departments. A separate telephone closet and dedicated security conduit systems are required for the U.S. Marshals Service use.

Special Plumbing Requirements

Special plumbing fixtures and fixture types shall be provided for all physically challenged building occupants and the public, security fixtures for prisoners, and private toilet rooms required to maintain U.S. courts and U.S. Marshals Service security separation and special fixtures for the U.S. Marshals Service fitness center.

Separate HVAC Systems

Separate HVAC systems shall be provided as follows:
1. Separate HVAC systems for the U.S. Marshals Service, prisoner secure movement, and detention areas for temperature-control and environmental isolation.
2. Separate HVAC systems with smoke removal for each courtroom and associated judge’s suite for separate temperature and humidity control, occupancy scheduling, and flexible zoning.
3. Separate HVAC systems for the U.S. Marshals Service fitness area.
4. Separate HVAC systems for data processing areas.
5. Separate HVAC systems for secure covered vehicle garage area.

**Special Ventilation Requirements**

Special ventilation systems shall be provided for vehicle garage areas, the fitness center for the U.S. Marshals Service, toilet rooms, storage rooms, mechanical and electrical rooms, and detention cell areas.

**Special Ceiling Heights**

Special ceiling heights shall be provided in the court-rooms as required for compliance with USCDG, the main building lobby, future courtroom expansion areas, vehicle garages and mechanical and electrical spaces.

Building structural design shall accommodate the maximum USCDG ceiling height for all courtrooms. The floor-to-floor height of the courtroom floors shall be at least the minimum allowable to accommodate ceiling heights, building structural components and above ceiling utility space.

**Column-Free Areas**

Special column-free areas shall be provided in current and future courtroom areas and in the vehicle garage area. Refer to the Executive Summary for a discussion of the preliminary project modeling philosophy and intent included in this analysis and a comparison of this model with the final model to be developed by the design A/E.

**Raised Floor Areas**

Raised floor areas shall be provided as required for data processing rooms and is recommended for all general office areas. The design A/E shall investigate providing recessed floor areas between judges’ benches and spectator areas for flexible routing space for current and future audio/visual cables for U.S. courts and attorneys’ equipment.

**Special Floor Loading**

Special floor loading shall be provided for equipment spaces, detention cell areas, vaults, storage, file rooms, and libraries.

**Adjacent/Access to Elevators and Loading Docks**

1. The loading dock shall be adjacent to the freight elevator, the mechanical/electrical spaces, building storage areas, and building maintenance areas.
2. The judges’ dedicated elevator shall be directly accessible from the enclosed parking garage and discharge into the secure judges’ corridors on all courtroom floors.
3. The dedicated U.S. Marshals Service restricted elevator for transport of prisoners shall be directly accessible from the secure vehicle sallyport and discharge directly to detention cell areas in the U.S. Marshals Service space and to each courtroom grouping.
4. Elevators shall be selected and sized to comply with occupant use as well as that required by emergency response personnel.
Acoustical Treatment
Special acoustical treatments shall be provided for all courtrooms for proper audio quality and for sound separation to protect security in all judges’ suites, U.S. Marshals Service and detention areas, and all boundaries between public and non-public spaces.

Lighting Level
Special lighting levels and level adjustment controls shall be provided in all courtrooms, judges’ suites, detention areas, and building exterior areas. Special consultants during project design are strongly recommended to assure proper application and installation for acoustic isolation, lighting applications, and specialized HVAC systems for detention area disease containment.

Design Guidelines
• The Facility Standards for the Public Buildings Service, P100
• U. S. Courts Design Guide, USCDG
• Standard Level Features and Finishes for U.S. Courts Facilities
• Requirements and Specifications for Special Purpose and Support Space – U. S. Marshals Service – Sections One, Two, and Three
• Metric Design Guide, PBS PQ260
• ISC Security Design Criteria

Websites
• LIST RELEVANT SITES

Budget Confirmation
• LIST REQUIREMENTS AND PROCEDURES FOR THIS CONFIRMATION
Strategies for Selecting the Lead Designer and the Design Excellence A/E Team

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### Housing Plan
Proposed U.S. Courthouse

<table>
<thead>
<tr>
<th>Code</th>
<th>Agency Group</th>
<th>10 Year Requirements</th>
<th>30 Year Requirements</th>
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<td>CSIA Customer Service</td>
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**Unusable Space Subtotal:**

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<th>20,719</th>
<th>223,023</th>
<th>25,038</th>
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**Construction Space:**

<table>
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<tr>
<th>Code</th>
<th>Construction Space (sq ft)</th>
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**Total:**

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<th>Total Parking (201)</th>
<th>Cross Square Meters (Maximum)</th>
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<tr>
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<td>327,452</td>
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<tr>
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Sample Vision Competition Briefing Agenda

Stage III Vision Competition Pre-Design Briefing Agenda

LOCATION
DATE
TIME

Attendees: Up to four individuals representing each A/E Team: Lead Designer and three additional team members.

Agenda

9:00 Welcome and Introductions
9:15 Design Excellence Process—The Vision
9:30 Presentation
  • Design Program
  • User/Tenant Philosophy and Culture
  • City of LOCATION
  • Facility Management
9:50 Questions and Answers on Competition Packet and Process
10:15 GSA Personnel and Clients Clarify Design Program Requirements
12:00 Contract Execution for Stage III Design Services
Strategies for Selecting the Lead Designer and the Design Excellence A/E Team

Sample Vision Competition Jury Agenda

Stage III Vision Competition Jury Agenda

LOCATION
DATE

Jury Session

9:30  Orientation and Initial Viewing of Stage III Vision Competition Submissions
10:30 Site Tour
11:30 Evaluation of Design Concepts
4:00  Jury Evaluation Report and Ranking
Sample Vision Competition Jury Ranking Form

PROJECT
Stage III Vision Competition—Jury Ranking

We, the jury members, agree to the following ranking of the “Vision” submissions for the lead designer-A/E team services of the FACILITY to be located in LOCATION. We agree that after our review, analysis, and discussion of the submitted design concepts, our ranking is based upon the one that best addresses the specified criteria for this federal project.

First Ranked:
A/E Team

Second Ranked:
A/E Team

Third Ranked:
A/E Team

Fourth Ranked:
A/E Team

INDEPENDENT JURY MEMBERS

NAME, TITLE:
Signature

NAME, TITLE:
Signature

NAME, TITLE:
Signature

DATE
## Sample FedBizOpps Announcement of Final Decision

**C — Design Services for the PROJECT in LOCATION**

- Synopsis - DATE
- Modification 01 - DATE
- Modification 02 - DATE
- PreSubmittal Meeting 01 - DATE
- Pre-Submittal Meeting Minutes and Sign-in Sheet 01 - DATE
- Modification 03 - DATE
- Modification 05 - DATE
- Final Award 01 - DATE

### General Information

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<thead>
<tr>
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<td>DATE</td>
</tr>
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<td>DATE IF NEEDED</td>
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### Contracting Office Address

**ADDRESS**

### Description

| Contract Award Date: | DATE |
| Contract Award Number: | NUMBER |
| Contract Award Amount: | AMOUNT |
| Contract Line Item Number: | ADD IF NEEDED |
| Contractor: | CONTRACTOR, ADDRESS |

### Point of Contact

**NAME, PHONE, EMAIL OF CONTRACTING OFFICER AND CONTRACT SPECIALIST**

### Place of Performance

**PROJECT LOCATION**
<table>
<thead>
<tr>
<th>POLICIES AND PROCEDURES</th>
<th>RESOURCES AND SAMPLE DOCUMENTS</th>
</tr>
</thead>
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<tr>
<td>7.0 Introduction</td>
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<td>7.1 The Three Types of</td>
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<td>Concept Development</td>
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<td>7.2 Peer Review Agenda</td>
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<td>7.3 The Commissioner</td>
<td>164</td>
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<tr>
<td>Concept Presentation</td>
<td>165</td>
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<td>7.4 Peer Roles in Concept Reviews</td>
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</tbody>
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Design Excellence in the Concept Development Process

7.0 Introduction

It is well known that quality outcomes are determined in the early stages of design. Decisions made during concept development and design development are ultimately the choices that not only determine the formal and programmatic dimensions of a project but also such issues as comfort, flexibility, construction challenges, budget, and schedule. Long-term success, then, is dependent on making the wisest choices during the earliest stages of design.

It is in this context that the Design Excellence Process includes several concept development reviews. The broad objective is to have discussions among professionals that focus on design not only as it impacts issues of form and detail but also as it affects on-time/on-budget delivery. These conversations can address general design strategies and urban context to more specific topics such as materials and building systems. The chart offers an overview of the steps and options in this phase of Design Excellence. A more detailed explanation follows.
## Concept Development: The Several Types of Concept Reviews

<table>
<thead>
<tr>
<th>Concept and Peer Reviews</th>
<th>DESIGN EXCELLENCE STEPS</th>
<th>DESIGN EXCELLENCE OBJECTIVES</th>
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<tr>
<td></td>
<td>Hold Informal Concept Preview with the Chief Architect</td>
<td>Confirm Viable Project Directions</td>
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<td></td>
<td>Lead Designer-A/E Team Develop Three Concept Options</td>
<td>Determine Best Project Concept Use National Peers as Objective Critics</td>
</tr>
<tr>
<td></td>
<td>Hold Initial Concept Peer Review Coordinating with OCA on Schedule and National Peer Participation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Lead Designer-A/E Team Develop Best Concept Option</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hold Concept Development Peer Review Coordinating with OCA on Schedule and National Peer Participation</td>
<td>Refine Design Concept Use National Peers as Objective Critics</td>
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<tr>
<td></td>
<td>Continue Refining Concept</td>
<td></td>
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<tr>
<td></td>
<td>Hold Additional Concept Development Peer Reviews as Needed Coordinating with OCA on Schedule and National Peer Participation</td>
<td></td>
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<tr>
<td></td>
<td>Continue Refining Concept</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hold Commissioner's Concept Review Coordinating Schedule with OCA</td>
<td>Endorse Final Design Concept Confirm Project is On-Time and On-Budget</td>
</tr>
</tbody>
</table>
The Three Types of Concept Development Reviews

Project Managers must convene a minimum of three concept development reviews, including two with national peers:

**INFORMAL OFFICE OF THE CHIEF ARCHITECT “CONCEPT PREVIEW”**

This is a relaxed conversation among the lead designer, key representatives of the GSA project management team, and the Chief Architect. It should occur as the three required concept options are being finalized. The purpose of this “preview” is to make sure that all three concept options are compelling and viable from a siting, design, programming, budget, and schedule perspective. The goal is to know that concepts, as they will be presented to the peers and customer, are realistic Design Excellence strategies—that they are architecturally outstanding, do not contain budget-busting features, and meet the customer’s needs and requirements.

Depending on what is most convenient, the OCA concept preview can be held in the Office of the Chief Architect or in the region.

Those attending this review, as already noted, are the individuals responsible for providing and managing the design services—the lead designers, the Chief Architect, and key members of the GSA project management team. Peers and the customer are not involved.

As is the case for all design concept reviews, the schedule should be handled through the OCA Center for Design Excellence and the Arts with as much advance notice as possible.

**INITIAL PEER REVIEW OF CONCEPT OPTIONS**

This occurs with the benefit of the input from the OCA concept preview as the design team finalizes three distinctive and viable conceptual design alternatives. The purpose of this review is to have distinguished private-sector peers from the GSA Public Buildings Service Commissioner’s National Register of Peer Professionals help GSA critique the
concept options and zero-in on the best concept strategy. The discussion can include an assessment of the fit between the program and various design approaches, siting and urban design issues, major spatial and architectural features, and an evaluation of special concerns related to such topics as structure or sustainability. The goal is not to generate a final endorsement or resolve specific problems but to have a candid professional conversation identifying design directions that will best meet GSA's objectives and the needs of the customer.

For new construction, the venue for this review is usually the lead designer's office. For major R&A, modernization, and preservation projects, this review should be held in the community where the existing facility is located so that peers have the option of visiting the site and the building.

This review is convened by the Chief Architect and involves three national peers—including the peer that participated in the A/E Selection process. Observers, if any, should be kept to an absolute minimum. The meeting is intended as a constructive discussion among professional stakeholders and not a presentation. The presence of observers discourages candid dialogue. In this context, there should be time for the national peers to meet privately to flesh out and organize their comments.

As is the case for all design reviews, the schedule should be handled through the OCA Center for Design Excellence and the Arts with six weeks advance notice in order to confirm the participation of the national peer involved in the A/E selection and allow the Center to appoint and confirm the participation of two other highly qualified national peers.

FINAL CONCEPT PEER REVIEWS
This review should be scheduled as the final design concept is well developed in terms of form, structure, major systems, and materials. At the same time, these decisions should
not be set in concrete. The timing should allow for further changes and refinements based on peer input. The goal, here, is to understand how the chosen concept has evolved and identify areas and pathways for making additional improvements. These might deal with urban design, security and entrance issues, architectural forms and spatial sequence, the fabric and materiality of the design, and insights regarding engineering, sustainability, efficiency and workplace design. Like the three-concept review, the purpose of the review is not to mandate solutions but to highlight opportunities to strengthen the design and fulfill project requirements. If significant changes are needed, the Chief Architect can recommend additional peer reviews to provide continued feedback in the concept development process.

For new construction, the venue for this review is usually the lead designer's office. For major R&A, modernization, and preservation projects, this review can be held in regional headquarters or in the community where the existing facility is located to accommodate a site visit.

All concept development peer reviews are convened by the Chief Architect with the same three national peers that critiqued the concept options. To assure candid discussion, observers, if any, should be kept to an absolute minimum, and the meeting should allow time for the national peers to meet privately to flesh out and organize their comments.

Reiterating a general rule of thumb, the schedule should be handled through the OCA Center for Design Excellence and the Arts with six weeks advance notice in order to confirm the participation of the national peers.
Peer Review Agenda

Peer reviews generally last three to four hours (not including site visits). The agenda should have these elements:

- Site Visit (for major R&A, modernization, and preservation projects)
- Project and Team Introductions
- Design Presentation
- Peer Questions
- Private Discussion among the Peers
- Peer Recommendations and Further Discussion
- Summary of Conclusions

The Commissioner's Concept Presentation

This is a presentation to GSA's Commissioner of the Public Buildings Service. It is the final review before moving into the design development phase of a project. By the time this meeting is organized, the general design, spatial qualities, materials, systems, and, if possible, the works of art for the project must be clearly defined. Independent estimates must confirm that costs are within budget, and a timeline must indicate how the building can be delivered on schedule. Ideally, the customer should feel its needs and priorities have been addressed. While there are always questions and comments at this meeting, the nature of this gathering is an affirmation that a project meets the high standards of the Design Excellence Program.

Those present include the Commissioner, Chief Architect, the design team, GSA project manager, representatives from the region, the OCA project coordinator, key GSA managers, and a cross section of customer representatives. The artists should attend to share that contribution. The peers are not there since, at this juncture, their insights have already been incorporated. At the conclusion of the meeting, the expectation is that the
Commissioner will officially endorse the concept design so the project can move forward. If any of the Commissioner's comments require further development, these will be sent to the region in writing.

7.4 Peer Roles in Concept Reviews

Peers from the Commissioner's National Register of Peer Professionals are objective, outside voices in the concept development discussion. They are challenged to address GSA's projects with a fresh vision and critiques that maintain the emphasis on Design Excellence. Three peers—rather than just a single peer—are invited at this stage in order to broaden the spectrum of expertise and bring new perspectives to the project. Depending on the project, peers can represent architecture, urban design, preservation, interior design, engineering, and other design expertise. The Center for Design Excellence and the Arts makes every effort to choose peers whose insights best contribute to the success of each project.

As they participate in the initial and final concept reviews, peers act in these capacities:

- **As a Colleague among Professionals**
  They should offer their advice and critiques with respect. Their interaction with the design team and customer should emphasize being helpful and not just critical. They are not there to second-guess overall design strategies but to identify collegially the best pathway for each project.

- **As a Sounding Board**
  They should confirm promising directions. They should point out missed opportunities. They should engage the design team in a conversation about options and ways to improve each project. They should suggest scenarios for further development.
• As Experts on a Broad Range of Issues

As they review projects, the peers should feel free to comment on such issues as urban design and siting, design and spatial strategies, materials and systems, as well as on special topics such as preservation, sustainability, and interior and workplace design.
Resources and Sample Documents

Sample Documents

Many sample documents are available as on-line Word files—go to:

http://insite.pbs.gsa.gov/PM/PMB/Design_Excellence_and_the_Arts

These Word documents can be used as templates by entering the requested information, shown as COLORED BOLD TEXT IN CAPS, and/or selecting and deleting other appropriate text, which generally have instructions in COLORED BOLD CAPS, with narrative options noted in non-bold colored text. Once the appropriate edits are complete, final documents can be high-lighted and reformatted entirely in black text.

Sample Peer Review Agenda
Sample Peer Review Agenda

**PROJECT NAME** Peer Review

**DATE**

Agenda

10:00  Introductions
10:10  Project Tour

(INCLUDE FOR MAJOR R:A, MODERNIZATION, AND PRESERVATION PROJECTS. IF A TOUR IS NOT NECESSARY, ADJUST AGENDA AND SCHEDULE TO COMPLETE THE PEER REVIEW IN EITHER THE MORNING OR THE AFTERNOON)

12:00  Lunch Break (on your own)

1:00   Design Presentation
1:30   Peer Questions

2:00   Private Discussion among Peers
2:30   Peer Recommendations and Continued Discussion
3:30   Adjourn
Policies and Procedures

8.0 Introduction
8.1 Planning Documents and A/E Selection
8.2 Funding for Art in Architecture Projects
8.3 Use of Art in Architecture Funds
8.4 Determining Suitability with Proposition-
   Level Repair and Alteration Projects
8.5 Commencing Art in Architecture Projects
8.6 Establishing Art in Architecture Panels
8.7 Inaugural Meeting of the Panel
8.8 Review of Artist Candidates by the Panel
8.9 Evaluating and Approving Artists
8.10 Contracting Artists
8.11 Artists’ Site Visits
8.12 Preliminary Concepts
8.13 Peer Workshops
8.14 Final Concepts
8.15 Fabrication and Installation of Artwork
8.16 Final Acceptance of Installed Artwork
8.17 Public Affairs and Education
8.18 Commencing Cyclical Maintenance
   for Installed Artwork
8.19 Cancellation of Art in Architecture Projects
8

8.0 Introduction

The Art in Architecture policies and procedures are under review. Once they are finalized, an updated Design Excellence: Policies and Procedures will be printed and distributed.
