
Appendix C.

Model Scope of Work Statement and Design Consultant Selection Criteria for the Preparation of Installation Design Guides.

As stated in Chapter 1, the design guidelines provided in this manual are intended for general application on all military installations and, therefore, it is recommended that each installation develop its own design guide, tailored to its specific situation. These specific installation design guides should contain appropriate guidelines for all the component elements comprising the visual environment (as covered generically in Chapters 3 through 13 of this manual). However, the design guide would be responsive to such locationally specific conditions as climate, prevailing architectural character, and any other atypical installation policies or conditions.

This appendix is intended to: 1) serve as a guideline for individual installations in the development of a scope of work for the preparation of a design guide, and 2) provide criteria to aid in the selection of a well-qualified design consultant to prepare the design guide.

Section I:

~~Outline Scope of Work Statement.~~

I. Statement of Work.

A. Project Identification.

Description of the installation location, environs, boundaries; subareas within the installation that require differential treatment; and other specific information identifying the project.

B. Objective.

The objective of this contract is to develop a design guide for (name of installation). This design guide is to establish specific design criteria and an outline program to improve the visual environment of (name of installation). The design criteria should be developed in response to the general guidelines contained within the Installation Design Manual but should be tailored specifically to the unique characteristics of the installation. The outline program for improving the appearance of the installation is intended to be incorporated into the master plan of the installation.

C. General Requirements.

1. The contractor shall furnish the necessary professional and technical personnel, clerical services, materials, equipment and facilities and perform all travel in accordance with this document and with criteria and requirements furnished by the contracting officer.

2. The contractor shall correct all errors, inconsistencies or omissions in the design guide brought to his attention by the contracting officer, and make resubmittals, if required by the contracting officer, even if the period of service has expired.

II. Specific Requirements.

A. Task I - Orientation Conference.

Within fifteen calendar days after issue of a notice to proceed and before proceeding with the work, a conference will be held at the office of the contracting officer, at which time the contractor's representative(s) who will be in active charge of the work shall be present in order that all requirements may be thoroughly reviewed.

B. Task II Data Collection and Analysis.

1. Perform a visual survey of the installation using photographic and/or sketch techniques to document findings.

2. Identify existing visual assets and liabilities.

3. Evaluate major influences on the visual environment. The installation master plan is the primary source of information for mission statements; existing topography, structures, roads and other physical conditions; and future proposed land uses and circulation. Climatological information should also be evaluated to determine appropriate architectural, site planning and planting criteria related to the visual environment.

4. Prepare a report documenting existing visual conditions, assets, liabilities and major influences on the visual environment. Submit copies for review and approval by the contracting officer.

C. Task III Design Criteria.

1. Establish specific goals, objectives and priorities for improving the visual environment of the installation.

2. Develop design criteria responsive to these goals, objectives and priorities. These criteria should be developed for each of the following elements comprising the visual environment of the installation:

- Buildings
- Roads
- Parking
- Walkways
- Plazas and Courtyards
- Bikeways
- Planting
- Signing
- Lighting
- Site Furnishings
- Utilities

The design guide should establish overall guidelines including: a) a general architectural design vernacular including desired architectural character, massing, scale, materials and color palette; b) plant materials, prototypical applications and details that are appropriate to the installation and its climate; c) site planning and design guidelines for site systems including circulation (vehicular, pedestrian, bikeway), parking, signing, lighting and utilities; and d) a coordinated design system for site furnishings, signing and lighting.

3. Prepare, in outline form, the proposed contents and format of the design guide and submit for review and approval by the contracting officer.

D. Task IV Design Guide.

1. Upon completion of all the work under Tasks I, II and III above, prepare text, illustrations and photographs for the design guide for *(name of installation)*.

2. Submit ____ copies of a draft mock-up of the design guide for review and approval by the contracting officer.

3. Correct all errors, inconsistencies and omissions in the draft design guide as indicated by the contracting officer.

4. Submit to the contracting officer ____ copies of the final design guide, an audio-visual presentation of the design guide and a narrative keyed on the slides.

III. Submittals and Schedule.

A. Orientation Conference

Fifteen calendar days after notice to proceed

B. Data Collection and Analysis Report.

- Copies
- Calendar days after orientation conference
- Calendar day review period

C. Outline Contents and Format of Design Guide.

- Copies
- Calendar days following previous review
- Calendar day review period

D. Draft Mock-up of Design Guide.

- Copies
- Calendar days following previous review
- Calendar day review period

E. Final Design Guide.

- Copies
- Calendar days following previous review

F. Set of Reproducible Originals for the Complete Guide.

Unfolded mylar reproducible of fold out drawings, if any. Negatives for all black and white photographs and printed matter.

IV. Contract Period of Service.

All work under this contract will be completed within ____ calendar days after issue of notice to proceed.

V. Material to be Furnished by the Contracting Officer.

A. Copies of the Installation Design Manual and other related government regulations and technical manuals.

B. Installation master plan and topographic, building, utility and other appropriate base maps and aerial photographs as available.

C. Technical guidance and information through conferences and review of submittals.

D. Design guides prepared for other installations that may be helpful as models for preparing the design guide for this installation.

Section II:**Design Consultant Selection Criteria.**

When selecting a consultant to prepare a design guide for a military installation, the following factors should be considered.

I. Firm Type, Design Disciplines and Organization.

The consultant should be a design-oriented firm or group of firms. Either a single firm or an affiliated group of firms can successfully prepare a design guide as long as all the necessary design disciplines are represented on the team. These should include architecture; site planning; landscape architecture; graphic design; and illumination, civil and mechanical engineering.

If an affiliated group of firms is to provide these various disciplines, the organization of the team is critical. One firm should be the prime contractor, and a lead designer with that firm should be clearly identified as the project director. He must be given the authority required for such a position.

II. Personnel, Experience and Design Excellence.

It is critical that the personnel identified to work on the project be experienced design professionals from each of the necessary disciplines. It is the experience of the personnel assigned, rather than the firm's experience, that is most important.

The type of experience that is most desirable includes site planning and design. Completed projects will clearly demonstrate the designer's abilities at compatibly relating groups of buildings to each other and their natural setting and of sensitive attention to all aspects of site design. This project experience need not necessarily have been performed for the military; comparable civilian projects include institutional campuses, new communities, housing and commercial complexes and industrial parks.

In evaluating this experience, the design excellence of the completed projects is of critical importance. Site visits to representative projects by the selection board is desirable to best evaluate the skill of the design professionals. Minimally, site plans and photographs of completed projects should be carefully reviewed. Project experience in the vicinity of the installation or in a similar climate is an advantage but not a necessity.

III. Size and Workload.

Size and workload are interrelated. A small firm or group of small firms can successfully perform the required tasks as long as they are not overextended in their current workload. The project manager should be assigned between 80 percent and full time to the project and the design professionals between 30-60 percent. More people spending lesser percentages of their time reduces the efficiency and continuity of the consultant effort.

IV. Location.

While not a primary selection criteria, the location of the firm or group of firms should be considered as it relates to required travel to the installation, to the project officer, and between firms as necessary. A significant amount of time at the installation by the designers is necessary to develop a full understanding of all aspects involved in the preparation of the design guide for the installation.

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