

**Architect/Engineer,  
Environmental  
Services, and  
Commissioning  
Agent Selection  
Board Procedures**

**Joint Forces Headquarters  
Alabama National Guard  
Montgomery, AL  
01 March 2025**

**UNCLASSIFIED**

# ***SUMMARY of CHANGE***

SMDR 200-3

Architect/Engineer, Environmental Services, and Commissioning Agent Selection Board Procedures

This revision, dated 01 March 2025

- *Supersedes SMDR 200-3, dated 5 December 2012*
- *Includes major changes/revisions in layout and organization of the SMDR*
- *Add Section I – Responsibilities*
- *Creates new, distinct Preliminary Selection Board Criteria and worksheets for A/E (Open End), A/E (Planning Services Open End), A/E (Major Construction) and Commissioning Agent evaluation, Environmental Services and GIS capabilities*
- *Change the existing Final Selection Board Evaluation Worksheet for use with final selection of A/E (Open-End)*
- *Creates new worksheet for Final Selection Board for the procurement of all Professional Services*

## Architect/Engineer, Environmental Services and Commissioning Agent Selection Board Procedures

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**By Order of The  
Adjutant General**

**DAVID K. PRITCHETT  
The Adjutant General**

**Official:**

**History:** This publication is a major update.

**Summary:** This publication defines the purpose, composition, and procedures for boards that select Architects/Engineers, Environmental Services, and Commissioning Agents to provide professional services for the Alabama National Guard utilizing Alabama Armory Commission Contracts.

**Applicability:** This regulation applies to the Alabama Army National Guard, the Armory Commission of Alabama, and the State Military Department.

**Proponent and Exception**

**Authority:** The proponent for this regulation is the Armory Commission of Alabama Contracting Officer (KO). The Contracting Officer has the authority to approve exceptions or waivers to this regulation that are consistent with controlling law and regulation. Activities may request a waiver to this regulation by providing justification, including full analysis to the Contracting Officer in writing.

**Army management control process:** This regulation contains management control provisions but does not identify key management controls that must be evaluated.

**Supplementation:** Supplementation of this regulation and establishment of command and local forms are prohibited without prior approval from the Contracting Officer.

**Suggested improvements:**

Users are invited to send comments and suggested improvements on DA Form 2028 (Recommended Changes and Blank Forms) directly to the Contracting Officer.

**Distribution:** This publication is available in electronic media only and is intended for Alabama Army National Guard, State Military Department, and the Armory Commission of Alabama use.

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## **Chapter 1**

### **1-1. Overview**

This regulation defines the purpose, composition, and procedures for boards that select Architects / Engineers (A/E), Environmental services and Commissioning Agents to provide professional services, through the Armory Commission of Alabama, for the Alabama National Guard utilizing Armory Commission of Alabama Contracts.

### **1-2. References**

Required and related publications are listed in Appendix A.

### **1-3. Explanation of Abbreviation and Terms**

Abbreviations and special terms are explained throughout this publication.

### **1-4. Responsibilities**

a. The Adjutant General is the approval authority for selection of Professional Services utilizing Alabama State Contracts.

b. The Contracting Officer (KO) has the principal responsibility to enter into approved A/E, GIS, or environmental professional service contracts. In addition to this, the KO is responsible for the following:

(1) Has the authority to approve exceptions or waivers to this regulation that are consistent with controlling law(s) and regulation(s).

(2) Has prior approval authority to supplement this regulation by establishment of command and/or local forms.

(3) Review and concur/non-concur with the results of any board conducted pursuant to this regulation.

(4) Appoint Contracting Officer Representatives (CORs) as necessary to assist in providing management controls for all professional service contracts.

(5) Notify the firms selected by the Preliminary Selection Board of the date, time and location of their respective interview with the Final Selection Board.

(6) Notify the approved Final Selection Board firm(s) of selection/non-selection.

(7) Draft and execute contract with approved firm(s).

(8) In conjunction with the CFMO, shall provide guidance to the Board Members in the development of relevant criteria to be utilized in the conduct of the Preliminary and Final Selection Boards.

(9) Shall appoint one COR to screen solicited packets for ensuring compliance with the project announcement and packet completeness for the packets to be considered for the Board.

c. Construction and Facilities Management Officer (CFMO) has the principal responsibility to recommend a President and Board members of A/E, GIS, or Environmental selection Boards. In addition to this, the CFMO shall be responsible for the following:

(1) Identify requirements for and provide to the KO an official request for the selection of professional A/E, GIS, or Environmental Services.

(2) Ensure appropriate staff coordinates with the KO for the solicitation and acceptance of packets for each A/E, GIS, or Environmental project announcement.

(3) In conjunction with the KO, shall recommend one member of the CFMO staff to screen solicited packets for ensuring compliance with the project announcement and packet completeness for the packets to be considered for the Board.

(4) The CFMO shall submit to the KO any changes to annual Preliminary and Final Selection Board(s) composition (i.e., Board President, Board Member unavailable) not less than 10 days in advance of the convening of the Board. This shall be done on a new appointment order.

d. The Board President has the principal responsibility to conduct selection boards in accordance with procedures guided by State Contracting Law and this regulation. The Board President shall be a voting member. The Board President shall ensure objectivity within the conduct of the Board and be responsible for the following:

(1) Ensure that the Board Members are properly selected and appointed by written orders.

(2) Ensure the Board Members are qualified and provide technical support for the appropriate selection Board as outlined in Chapter 2 of this regulation.

(3) Preside over the Preliminary Selection and/or Final Selection Board, as indicated by the written appointment order from the CFMO.

(4) Ensure a quorum is present and that minutes are taken and properly distributed.

(5) Ensure that all members have signed the "Statement of Ethics" form and submitted it to the Secretary/Recorder before the Board begins Preliminary and Final Selection Board procedures.

(6) Review Final Selection Board procedures and potential interview questions to validate relevant, technical capabilities for the desired selection board.

(7) Develop Final Selection Board Procedures and set expectations of the order of questions/ presentations as required, and assign each Board Member the responsibility of asking technical, relevant questions for the selection of design and commissioning boards. The Board President shall ensure the same Board Member asks the same questions to each firm selected for interview, if applicable.

(8) If applicable, ensure that each firm is provided the same opportunities to present capabilities (master planning professional services) and the format is followed with time limits for presentation and question/answer session.

(9) Present results of the Final Selection Board as recommendations to the KO and CFMO for concurrence/non-concurrence.

(10) Present Final Selection Board results with recommendation to the Adjutant General for Final Approval.

e. The Board Members principal responsibility includes reviewing packets under consideration in a Preliminary Selection Board, and participating in the Final Selection Board procedures as developed by the Board President. Responsibilities include:

(1) Board Members shall be familiar with the requirements for the specific project type(s) for the professional services desired by the Board (i.e., design, commissioning, or master planning).

(2) Board Members will provide technical review of the proposals accepted by the Armory Commission in accordance with the request for proposal, under the guidance of the Board President.

(3) Upon the request of the Board President, provide and obtain approval of interview questions related to the specific project type(s) as outlined in the RFP.

(4) Ensure knowledge and complete understanding of scoring criteria in the Preliminary and Final Selection Board procedures related to the specific project type(s) and understand the evaluation worksheets associated with each.

(5) Provide signed "Statement of Ethics" form (Appendix B) to the Secretary/Recorder prior to the participation of a specific selection board.

(6) Board members shall be available upon request of the Board President for selection board meetings through the completion and adjournment of the selection board.

f. The Secretary/Recorder has the principal responsibility of completing the minutes for the Preliminary and Final Selection Boards, ensuring all Board Members complete the "Statement of Ethics" form (Appendix B), and preparing correspondence on behalf of the Board President as required.

The Secretary/Recorder is a non-voting member of the Board and shall complete the following:

- (1) Shall, on behalf of the Board President, notify Board members of the date, time, and location of the Preliminary and Final Selection Board meetings.
- (2) Gather Armory Commission accepted packets for the Preliminary Selection Board upon notification of convening the Board by the Board President.
- (3) Reserve the location of the selection board meeting.
- (4) Take minutes of the Board meetings and prepare them for submittal to the Armory Commission.
- (5) Gather Board Member's "Statement of Ethics" forms as required by this regulation to provide to the Armory Commission.
- (6) Provide this regulation for reference to all Board Members, along with the evaluation criteria to be utilized for the Preliminary and Final Selection Board Meetings.
- (7) Shall tabulate all evaluation worksheets to provide an Order of Merit List to Board President as required.
- (8) Prepare all correspondence on behalf of the Board President as required.
- (9) Gather all minutes, documents, correspondence, and evaluation worksheets from the Board Members and provide a single file of the board meetings to the Armory Commission / KO.

## **Chapter 2**

### **Section I**

#### **2-1. Purpose of the Preliminary Selection Board**

The purpose of the Preliminary Selection Board is to select the best qualified applicant(s) to be interviewed by the Final Selection Board.

#### **2-2. Purpose of the Final Selection Board**

The purpose of the Final Selection Board is to select the best qualified firm(s) to whom a State Contract will be awarded for providing professional services, to include design, construction administration, commissioning and/or planning services, or whom will be added to the Open-End Contract.

#### **2-3. Composition of the Selection Board**

The Selection Board shall be composed of members who, collectively, have experience in architecture, engineering, commissioning, construction, facilities management, real property, geospatial information systems and database management, installation / community planning objectives, energy management, environmental services, GIS capabilities and federal or state related acquisition. The Board shall be comprised of the following:

- a. The Board President must be a minimum rank of Lieutenant Colonel or GS-12 equivalent.
- b. The Board members shall have experience in the areas defined above.
- c. The Board shall include, other than the Board President, a minimum of three (3) qualified members in the areas defined above.
- d. The Board members shall be appointed annually to serve on either the Preliminary Board(s) or Final Selection Board(s). No member of a Board will serve on both during the same period.
- e. The Board members shall be listed on the appointment order as Primary and Alternate, providing capability to convene a quorum for any project announcement requested.
- e. The Board President shall determine a quorum of voting Board Members present to conduct any Preliminary or Final Selection Board(s).

## **2-4. Preliminary Selection Board**

Preliminary Selection Boards will review and consider all packets submitted by a qualified firm based on the requirements of the project announcement. The Board will select no more than six (6) of the most qualified firms to be interviewed by the Final Selection Board. In the case of a tie, no more than seven (7) firms will be submitted to the Final Selection Board. The firms selected for the interview will be notified no less than ten (10) days prior to the date of the interview.

Minutes of the meetings will be taken by the Secretary/Recorder of the Board and filed. The minutes shall be retained at the State Military Department for a period of four (4) years from the accompanying Final Selection Board and then shall be offered to the Department of Archives and History.

## **2-5. Final Selection Board**

Final Selection Boards will be conducted in an interview format and A/E, GIS, or Environmental firms will provide a capabilities brief, unless otherwise directed by the KO.

## **2-6. Selection Criteria**

Concurrent with the publication of the Request for Proposal (RFP) there shall be published a detailed criteria list and evaluation standard. The project announcement shall incorporate selection criteria approved by the KO prior to being sent for solicitation of packets. The Selection Boards shall then utilize the project announcement selection criteria in the Preliminary and Final Board Selection procedures. Examples of potential selection criteria include:

- a. Location of the firm.
- b. Experience with local, state, and federal Codes.
- c. Experience with Department of Defense and military design criteria and standards.
- d. Experience with projects specified on the project announcement.
- e. Ability to accomplish required service.
- f. Delivery of presentation (if applicable) and/or final interview responses (if applicable).

## **2-7. Conduct of the Preliminary Selection Board**

The Preliminary Selection Board will be conducted as follows:

- a. The Board President will call the Board to order.
- b. The Secretary/Recorder will call the roll.
- c. The Board President will ensure that he/she, all Board Members, and the Secretary/Recorder have read and signed the "Statement of Ethics", as found in Appendix A.
- d. The Board President will ensure that all voting Board Members are aware of the following four (4) items. If any voting member of the Board has a conflict with any of the following four (4) items they are to inform the Board President prior to the Board beginning the evaluation of packets or interviewing firms. Upon notification, the Board President will release the Board Member from the Board:

(1) All voting Board Members shall avoid all conflicts of interest or the appearance of a conflict of interest, and shall be totally impartial in their evaluation and selection of the firms. No voting Board Member shall be allowed to participate on any selection board that evaluates firms in which he/she;

(2) has a business or personal relationship;

(3) is related to a principal/employee of the firm;

(4) is, or has been within the last ten (10) years, superior or subordinate in OER/NCOER rating to a principal/employee of the firm who is or has been also a member of the Armed Forces of the United States.

e. All voting Board Members are responsible for notifying the Board President of a conflict of interest or appearance of a conflict of interest and request to be excused from that particular board.

- (1) The Board President, Board Members and Secretary/Recorder will not discuss the proceedings of the board and will not discuss the results of the board until authorized by the KO.
- (2) Compliance is mandated by Alabama law, Code of Ethics for Public Officials, Employees, Etc., Alabama Code 36-25-1 et seq. and federal regulation, Joint Ethics Regulation (JER), DoD 5500.7-R.
- (3) The Board President will now determine if there is a quorum of voting members present. If there is not a quorum present then he will adjourn the Board and notify the KO and CFMO.
- (4) If there is a quorum of voting members present, the Board President will proceed with the duties of the Board.
- (5) The Secretary/Recorder will provide to each voting member the following items: Evaluation Criteria, Evaluation Worksheet, scratch paper and writing implement.
- (6) The Secretary/Recorder will provide the packets and the project announcement to the Board President.
- (7) The Board President will supervise the evaluation of the packets.
- (8) The Board President will tabulate and rank order the results of the Board.
- (9) The Board President will then adjourn the Board.
- (10) The Board President will write a memorandum to the Adjutant General, through KO and CFMO, with the results of the Board and in compliance with paragraph 2-4 of this regulation.
- (11) The Board President will receive concurrence/non-concurrence from KO and CFMO, followed by the Adjutant General. The Board President will provide the memorandum with original comments to the KO and a copy to the Secretary/Recorder.

## **2-8. Conduct of the Final Selection Board**

The Final Selection Board will be conducted as follows –

- a. The Board President will call the Board to order.
- b. The Secretary/Recorder will call the roll.
- c. The Board President will ensure that he/she, all Board Members, and the Secretary/Recorder have read and signed the “Statement of Ethics”, as found in Appendix A.
- d. The Board President will ensure that all voting Board Members are aware of the following four (4) items. If any voting member of the Board has a conflict with any of the following four (4) items they are to inform the Board President prior to the Board beginning the evaluation of packets or interviewing firms. Upon notification the Board President will release the Board Member from the Board.
  - (1) All voting Board Members shall avoid all conflicts of interest or the appearance of a conflict of interest, and shall be totally impartial in their evaluation and selection of the firms. No voting Board Member shall be allowed to participate on any selection board that evaluates firms in which he/she;
  - (2) has a business or personal relationship;
  - (3) is related to a principal/employee of the firm;
  - (4) is, or has been within the last ten (10) years, superior or subordinate in OER/NCOER rating to a principal/employee of the firm who is or has been also a member of the Armed Forces of the United States.

- e. All voting Board Members are responsible for notifying the Board President of a conflict of interest or appearance of a conflict of interest and request to be excused from that particular board.
- f. The Board President, Board Members and Secretary/Recorder will not discuss the proceedings of the board and will not discuss the results of the board until authorized by the KO.
- g. Compliance is mandated by Alabama law, Code of Ethics for Public Officials, Employees, Etc., Alabama Code 36-25-1 et seq. and federal regulation, Joint Ethics Regulation (JER), DoD 5500.7-R.
- h. The Board President will now determine if there is a quorum of voting members present. If there is not a quorum present then he will adjourn the Board and notify the KO.
- i. If there is a quorum of voting members present, the Board President will proceed with the duties of the Board.
- j. The Secretary/Recorder will provide to each voting member the following items: Interview Schedule, Evaluation Worksheet, scratch paper and writing implement.
- k. The Secretary/Recorder will provide the interviewing firms' packets and the project announcement to the Board President.
- l. The Board President will review the proposed questions, assign each question to one Board Member and direct the Board in the conduct of the interview process.
- m. The Board will conduct the interviews, assign applicable points and generate a score.
- n. The Board President will tabulate and rank order the results of the Board.
- o. The Board President will then adjourn the Board.
- p. The Board President will write a memorandum for the Adjutant General, through KO, with the results of the Board and in compliance with paragraph 2-4 of this regulation.
- q. The Board President will receive concurrence/non-concurrence from KO followed by the Adjutant General. The Board President will provide the memorandum with original comments to the KO and a copy to the Secretary/Recorder.

## **2-9. Professional Services Project Selection Board Types**

The requesting activity's request to the KO shall specify the Professional Services Project Selection Board Type. All requests will be in memorandum format and must be in accordance with State Law for the selection of professional services. These selection board types are described in further detail in Sections II-IV in Chapter 2 of this regulation. The following selections boards are most common, although this list is not all inclusive.

- a. Major military construction (MILCON) project (Project Design).
- b. Open End O&M Design Services Contract (Project Design).
- c. Open End Master Planning Contracts.
- d. Open End Contract (Commissioning).
- e. Special Selection Boards authorized by the KO.
- f. Environmental Services
- g. GIS Services

## **Section II**

### **Professional Services – Design**

#### **2-10. General**

The purpose of the Preliminary Selection Board is to select the best qualified applicant(s) to be interviewed by the Final Selection Board.

## **2-11. Professional Services Project Selection Board Types**

There are two types of professional service project selection types supporting design efforts and professional consultant work for the Armory Commission of Alabama.

a. A/Es, GIS, or Environmental firms may be selected for award for Open End Design Service Contracts to provide services with the Armory Commission and the KO.

(1) The project selection boards for these type services shall recommend from an order of merit list (OML) no less than three (3) firms for award, and up to six (6) firms, depending on workload projected by the CFMO and KO. The Board President shall consider the workload capacity and potential prior to making OML recommendations to the TAG.

(2) The CFMO and KO have the authority to ensure OML recommendations provide ample capabilities to support workload and recommend increasing the number of firms selected. However, the OML developed by the Board shall be used in order of precedent for selection.

(3) The CFMO and KO may choose, based upon potential workload and if only enough packets are solicited from the announcement, to forego a Board and choose all selected packets, pending screening from the appointed authorities. Every effort shall be made to conduct a Preliminary and Final Selection Boards.

(4) A/E Firms may only solicit every other project announcement for Open End Design Service Contracts through the Armory Commission.

b. A/Es may be selected for award for a Military Construction Design Contract as authorized by the Armory Commission and announced by the KO.

## **2-12. Execution of the Selection Boards**

The CFMO Design and Project Management Division has the primary responsibility for requesting professional services for design contracts. The execution of these Selection Boards will follow the guidelines listed in Chapter 2 of this regulation with Preliminary and Final Selection Boards convened. The composition of these boards falls in line with all other selection board types. The Selection Boards will only be convened and executed upon approval of the KO, and solicitations have been received per the requirements outlined in the project announcement.

## **2-13. Selection Board Process**

The Design and Project Management Branch will utilize the following procedures in the execution of these Selection Boards:

a. Design and Project Management (DPM) will identify the requirement for design services needed to support various project types authorized to be conducted in the CFMO.

b. DPM shall develop an official request for the convening of a Selection Board. The information in the request, upon approval of the KO, shall be made available to the Board President to provide required information that would be helpful in the selection / recommendation process. This request should include at a minimum:

(1) The request shall be in memorandum format through the CFMO to the KO.

(2) The request shall include an enclosure for the request for proposal for the project announcement.

(3) The request shall describe the nature of the request (Open End or MILCON Selection Board) and include details about the potential workload (Open End Requests).

(4) The request shall describe the potential duration of the workload (time) and potential amounts of the workload to ensure the KO has enough information to develop draft contracts in accordance with State Law.

(5) The request shall include an enclosure for the Selection Board Evaluation Criteria to be utilized in that project announcement.

(6) Open End Design Contract requests shall incorporate the approved Design Services Fee chart applicable at the time of project announcement.

(7) The request shall incorporate a recommended timeline for execution of the Preliminary and Final Selection Board process.

(8) The request shall include an appointment memorandum for the President and Board Members recommending approval by the KO.

#### **2-14. Convening of the Professional Services – Design Selection Boards**

The KO shall request a list of firms IAW State of Alabama professional services contracting procedures and guidelines. Upon acceptance of the packets, the Contracting Officer/Representative shall coordinate with the DPM Branch to develop the Board. These procedures listed below shall be followed:

a. The DPM Division Chief shall coordinate for the appointment of a Board President for the Preliminary and Final Selection Boards.

b. The DPM Division Chief or his representative shall recommend and assist in finding highly qualified Board Members to serve on the Preliminary and Final Selection Boards as required.

c. The DPM Division shall provide to the Board President a Secretary/Recorder, and that individual shall coordinate directly with the Board President on all items listed previously.

d. The Board President shall convene the Preliminary Board for packet review in accordance with procedures defined earlier in this regulation.

e. The Board President shall only adjourn the Preliminary Board upon development of an order of merit list providing recommendation of six (6) firms, no more than seven (7) firms in the event of a tie, to be selected for final interviews.

f. The Final Selection Board for Professional Services – Design Service Boards shall be conducted utilizing the following format:

(1) The Board President has up to five (5) minutes to welcome the firm, introduce the Board Members, and provide the A/E Firm with instructions as set forth by the KO with regard to the conduct of the Interview. The Board President shall also set aside 5 minutes following the interview question session to allow the firm time to speak and provide additional information to the Board Members.

(2) The next forty (40) minutes shall be for each Board Member, as authorized by the Board President, to ask questions to the A/E with regard to the qualification of their capabilities. Each Board Members shall ask the SAME questions to the each of the Firms invited to the Final Selection Board. Follow up questions are allowed for clarification. Firms are NOT permitted to have potential consultants present for the Final Selection Board interviews.

(3) Each firm shall be provided ten (10) minutes of time to ask the Board members questions.

(4) The remaining five (5) minutes is for the Board President to make any closing remarks and thank each firm for coming to participate in the process. The Board President may elect to inform the firms that the recommendations will be forwarded to TAG for approval, and the KO would be in touch regarding the selections upon approval by TAG.

g. Upon completion of the Final Selection Board presentations, the Board President shall direct the Secretary/Recorder to tabulate the evaluation worksheets and provide an OML that can be used in development of memorandum to recommend awards.

### **Section III**

#### **Professional Services – Commissioning**

##### **2-15. General**

The purpose of the Professional Services – Commissioning is to provide the KO the capability for commissioning on Sustainment, Restoration, and Modernization (SRM) and Military Construction (MILCON) projects as needed.

a. The A/E Professional Services Commissioning are incorporated into Title I Design and Title II Services.

b. Professional Services for Commissioning for Open End Design Projects and MILCON projects will be selected from already existing A/E Open End Design Contracts validated by the Armory Commission of Alabama.

c. Commissioning services provided on a single project shall not be from the same A/E firm selected for the design efforts on the same project.

d. Commissioning services cost for SRM projects shall be based on industry standard square foot assessments for the specific type services requested utilizing a lump sum fee proposal, provided with independent supporting documentation to meet the requested announcement statement of work (SOW). The following types of commissioning are examples of typical commissioning requests:

- (1) Building Shell
- (2) Mechanical Systems
- (3) Electrical Systems
- (4) Plumbing Systems
- (5) Other components as requested / available

e. Commissioning services provided for a MILCON project are programmed as a line item cost on the programming documents and are limited to 0.4% of primary facility Cost for Title I Services and 0.6% of the primary facility cost for Title II Services.

#### **Section IV**

#### **Professional Services – Master Planning**

##### **2-16. General**

The purpose of this section is to further define the various project types and procedures utilized in the selection of professional services to support master planning, real property inventories, facility utilization surveys, feasibility studies, facility assessments, energy audits, development of energy plans, project programming document charrettes (PPDCs), and other real property development plans.

a. The A/E Professional Services – Master Planning Contracts are Title I Services in accordance with State Law. There is no Title II requirement for construction administration services in these contracts.

b. The project selection boards for these type services shall recommend from an order of merit list (OML) no more than four (4) firms for Open End Contracts.

d. Special Selection Boards approved by the KO shall result in the recommendation of one (1) firm for contract award.

##### **2-17. Professional Services Project Selection Board Types**

There are two types of professional service project selection types supporting Master Planning requirements:

a. A/Es may be selected for award for Open End Master Planning Contracts with the Armory Commission and the KO.

b. A/Es may be selected for award for Special Selection Boards as authorized by the Armory Commission. These include services needed when only a select group of potential A/Es meet the requirements set forth in DoD or Army standards as approved vendors for that type of service (i.e., BUILDER Sustainment Management Systems has only six (6) nationwide firms authorized to provide assessments into this program). These contracts are exceptionally rare and the CFMO Plans and Programs Division shall justify the requirement to the KO and receive approval to utilize Special Selection Boards.

##### **2-18. Execution of the Selection Boards.**

The CFMO Plans and Programs Division has primary responsibility for requesting professional services – master planning A/E contracts. The execution of these Selection Boards will follow

the guidelines listed in Chapter 2 of this regulation with Preliminary and Final Selection Boards convened. The composition of these boards fall in line with all other selection board types. The Selection Boards will only be convened and executed upon approval of the KO, and solicitations have been received per the requirements outlined in the project announcement.

## **2-19. Selection Board Process**

The Plans and Programs Division will utilize the following procedures in the execution of these Selection Boards:

a. The Plans and Programs (P&P) Division will identify the requirement for professional services – master planning needed to support the various programs authorized to be conducted in the CFMO.

b. The P&P Division shall develop an official request for the convening of a Selection Board. The information in the request, upon approval of the KO, shall be made available to the Board President to provide required information that would be helpful in the selection / recommendation process. A sample format has been included as Appendix x. This request should include at a minimum:

(1) The request shall be in memorandum format through the CFMO to the KO.

(2) The request shall include an enclosure for the request for proposal for the project announcement.

(3) The request shall describe the nature of the request (Open End or Special Selection Board) and include details about the potential workload (Open End Requests).

(4) The request shall describe the potential duration of the workload (time) and potential amounts of the workload to ensure the KO has enough information to develop draft contracts in accordance with State Law.

(5) The request shall include an enclosure for the Selection Board Evaluation Criteria to be utilized in that project announcement.

(6) Open End Master Planning Contract requests shall include an enclosure for the potential cost tables and guidelines to be utilized for the selection board for that project announcement.

(7) The request shall incorporate a recommended timeline for execution of the Preliminary and Final Selection Board process.

(8) The request shall include the primary P&P POC responsible for providing the CFMO a Board President and highly qualified Board Members.

## **2.20. Convening of the Professional Services – Master Planning Selection Boards**

The KO shall solicit proposals once approving the requirement for the Selection Boards. Upon acceptance of the packets, the KO/Representative shall coordinate with the P&P Branch to develop the Board. This procedures listed below shall be followed:

a. The P&P Division Chief shall coordinate for the appointment of a Board President for the Preliminary and Final Selection Boards.

b. The P&P Division Chief or his representative shall recommend and assist in finding highly qualified Board Members to serve on the Preliminary and Final Selection Boards as required.

c. The P&P Division shall provide to the Board President a Secretary/Recorder, and that individual shall coordinate directly with the Board President on all items listed previously.

d. The Board President shall convene the Preliminary Board for packet review in accordance with procedures defined earlier in this regulation.

e. The Board President shall only adjourn the Preliminary Board upon development of an order of merit list providing recommendation of six (6) firms, no more than seven (7) firms in the event of a tie to be selected for final presentations.

f. The Final Selection Board for Professional Services – Master Planning shall be conducted utilizing the following format:

(1) The Board President has up to five (5) minutes to welcome the firm, introduce the Board Members, and provide the A/E Firm with time to set up any audio/visual aids as required.

(2) Each firm selected for the Final Selection Board Process shall be provided forty (40) minutes of time to present their individual firm's capability to support the project announcement types.

(3) Each firm shall be provided ten (10) minutes of time to ask the Board members questions.

(4) The remaining five (5) minutes is for the Board President to make any closing remarks and thank the firm for coming to participate in the process. The Board President may elect to inform the firm that the recommendations will be forwarded to TAG for approval, and the KO would be in touch regarding the selections upon approval by TAG.

g. Upon completion of the Final Selection Board presentations, the Board President shall direct the Secretary/Recorder to tabulate the evaluation worksheets and provide an OML that can be used in development of memorandum to recommend awards. The recommendation shall be prescribed by the limits set forth in Chapter 2-16 of this regulation for these type contracts.

## **Section V Environmental Services**

### **2-21. General**

The purpose of this section is to further define the various project types and procedures utilized in the selection of professional services to support three main project areas: Environmental Compliance, Natural/Biological Resources, and Archaeological/Historical Resources. Examples of these services include, but are not limited to: environmental compliance investigations or studies, permitting, plan certification, environmental design review, sampling and laboratory analysis, dye tracing, infrastructure studies, water quality studies, biological studies, biological surveys and counts (flora and fauna), threatened and endangered species monitoring, waterbody maintenance and stream restoration design, game management, pest management, archaeological surveys, artifact analysis, archaeological/historical thematic studies, historic building surveys, Native American Consultation services and assistance, and curation services.

a. Environmental Professional Services – Environmental Services Contracts are Title I Services in accordance with State Law. There is no Title II requirement for construction administration services in these contracts.

b. Environmental Professional Services – Environmental Services Contracts and extensions are let in accordance with applicable statutes through the KO.

c. The project selection boards for these type services shall recommend from an order of merit list (OML).

### **2-22. Professional Services Project Selection Board Types**

There are two types of professional service project selection types supporting Environmental Services requirements:

a. A/Es OR Environmental firms may be selected for award for Open End Environmental Services Contracts with the Armory Commission and the KO.

b. A/Es OR Environmental firms may be selected for award for Special Selection Boards as authorized by the Armory Commission. These include services needed when only a select group of potential A/Es or Environmental firms meet the requirements set forth in DoD, Army, or Federal/State of Alabama environmental standards as approved vendors for that type of service (e.g., entities that hold special permits to perform environmental services for a particular subject area, or have experience performing environmental services for rare or Native groups). These contracts are exceptionally rare and the CFMO Plans and Programs Division shall justify the requirement to the KO and receive approval to utilize Special Selection Boards.

### **2-23. Execution of the Selection Boards.**

The CFMO Environmental Division has primary responsibility for requesting professional services – Environmental Services contracts. The execution of these Selection Boards will follow the guidelines listed in Chapter 2 of this regulation with Preliminary and Final Selection Boards convened. The composition of these boards fall in line with all other selection board types. The Selection Boards will only be convened and executed upon approval of the KO, and solicitations have been received per the requirements outlined in the project announcement.

### **2-24. Selection Board Process**

The Environmental Division will utilize the following procedures in the execution of these Selection Boards:

a. The Environmental Division will identify the requirement for environmental professional services needed to support the various programs authorized to be conducted in the CFMO.

b. The Environmental Division shall develop an official request for the convening of a Selection Board. The information in the request, upon approval of the KO, shall be made available to the Board President to provide required information that would be helpful in the selection / recommendation process. A sample format has been included as Appendix M. This request should include at a minimum:

(1) The request shall be in memorandum format through the CFMO to the KO.

(2) The request shall include an enclosure for the request for proposal for the project announcement.

(3) The request shall describe the nature of the request (Open End or Special Selection Board) and include details about the potential workload (Open End Requests).

(4) The request shall describe the potential duration of the workload (time) and potential amounts of the workload to ensure the KO has enough information to develop draft contracts in accordance with State Law.

(5) The request shall include an enclosure for the Selection Board Evaluation Criteria to be utilized in that project announcement.

(6) The request shall incorporate a recommended timeline for execution of the Preliminary and Final Selection Board process.

(7) The request shall include the primary Environmental POC responsible for providing the CFMO a Board President and highly qualified Board Members.

### **2.25. Convening of the Environmental Professional Services Selection Boards**

The KO shall solicit proposals once approving the requirement for the Selection Boards. Upon acceptance of the packets, the Contracting Officer/Representative shall coordinate with the Environmental Branch to develop the Board. This procedures listed below shall be followed:

a. The Environmental Division Chief shall coordinate for the appointment of a Board President for the Preliminary and Final Selection Boards.

b. The Environmental Division Chief or his representative shall recommend and assist in finding highly qualified Board Members to serve on the Preliminary and Final Selection Boards as required.

c. The Environmental Division shall provide to the Board President a Secretary/Recorder, and that individual shall coordinate directly with the Board President on all items listed previously.

d. The Board President shall convene the Preliminary Board for packet review in accordance with procedures defined earlier in this regulation.

e. The Board President shall only adjourn the Preliminary Board upon development of an order of merit list providing recommendation of six (6) firms, no more than seven (7) firms in the event of a tie to be selected for final presentations.

f. The Final Selection Board for Environmental Professional Services shall be conducted utilizing the following format:

(1) The Board President has up to five (5) minutes to welcome the firm, introduce the Board Members, and provide the firm with time to set up any audio/visual aids as required.

(2) Each firm selected for the Final Selection Board Process shall be provided forty (40) minutes of time to present their individual firm's capability to support the project announcement types.

(3) Each firm shall be provided ten (10) minutes of time to ask the Board members questions.

(4) The remaining five (5) minutes is for the Board President to make any closing remarks and thank the firm for coming to participate in the process. The Board President may elect to inform the firm that the recommendations will be forwarded to TAG for approval, and the KO would be in touch regarding the selections upon approval by TAG.

g. Upon completion of the Final Selection Board presentations, the Board President shall direct the Secretary/Recorder to tabulate the evaluation worksheets and provide an OML that can be used in development of memorandum to recommend awards. The recommendation shall be prescribed by the limits set forth in Chapter 2-16 of this regulation for these type contracts.

BY ORDER OF GOVERNOR IVEY:



DAVID K. PRITCHETT  
Major General, ALNG  
The Adjutant General

# APPENDIX A

## REFERENCES

### **Section I Required Publications**

**Section 41-2-122 through 41-2-124**  
Code of Alabama 1975

**NGR 415-5**  
Army National Guard Military Construction Program Development and Execution, dated 6 March 2015

### **Section II Prescribed Forms** SF 330

# APPENDIX B

## STATEMENT OF ETHICS

I certify that I have read and understand the Architect/Engineer or Commissioning Agent Board Procedures and agree to comply with them as a Board member. I certify that, to my knowledge, there is no conflict of interest on my part as outlined in Para 2-7 *d* or 2-8 *d* of SMDR 200-3, and that I am in compliance with the applicable ethics guidance.

---

Board Member (Printed)

---

Board Member (Signature)

---

Date

# APPENDIX C

## PRELIMINARY SELECTION BOARD A/E (OPEN-END) CRITERIA EVALUATION

Each Board Member should evaluate the A/E firms using the rating factors and values shown on the Evaluation Worksheet.

Each rating factor should be considered carefully when assigning point values.

The maximum assigned value for each rating factor may be 5, 10 or 15 based on its importance. The associated points for the range of applicability are depicted below:

<u>Max Value</u>	<u>Range</u>		
	<u>Low</u>	<u>Mid</u>	<u>High</u>
5	1-2	3-4	5
10	1-4	5-7	8-10
15	1-5	6-10	11-15

The following criteria have been established to assist the evaluator in assessing each rating factor.

1. Location of the firm: (Main or Branch Office)
  - a. High Range – Main Office located in Alabama.
  - b. Mid Range – Main Office located in adjacent state with Branch Office located in Alabama.
  - c. Low Range – Main and Branch Office(s) located in adjacent state.  
(\*NOTE: If no Main or Branch Office is located in adjacent state, then score will be 0).
2. Experience with State Code and Military & Unified Criteria. Rate each of the following elements separately.
  - a. Architectural
  - b. Civil & Structural Engineering
  - c. Electrical Engineering
  - d. Mechanical Engineering
  - e. Information Technology Engineering
  - f. Sustainability Projects
3. Experience with design and construction of military / military support facilities.
  - a. High Range – At least one of each like-type of facility as noted on project announcement.

- b. Mid Range – At least one type of facility as noted on project announcement.
  - c. Low Range – None of the facilities as noted on project announcement.
4. Ability to accomplish required services: Rate each of the following elements separately.
- g. Meets Schedules:
    - 1. High Range – no indication of failure to meet schedule.
    - 2. Mid Range – one indication of failure to meet schedule.
    - 3. Low Range – multiple indications of failure to meet schedule (\*NOTE: If no information is in packet, then score will be 0).
  - h. Quality of Work:
    - 1. High Range - no indication of failure to meet design customer design standards or to provide quality Supervision, Inspections and Overhead (SIOH) services.
    - 2. Mid Range - one indication of failure to meet design customer design standards or to provide quality Supervision, Inspections and Overhead (SIOH) services.
    - 3. Low Range - multiple indications of failure to meet design customer design standards or to provide quality Supervision, Inspections and Overhead (SIOH) services (\*NOTE: If no information is in packet, than score will be 0).

# APPENDIX D

## PRELIMINARY SELECTION BOARD A/E EVALUATION WORKSHEET

DATE: \_\_\_\_\_

PROJECT: \_\_\_\_\_

Page \_\_\_\_\_ of \_\_\_\_\_

		Experience with State Code and Military & Unified Criteria						Experience with this type Facility	Ability to accomplish required services		TOTAL POINTS
		LOCATION OF AE FIRM	Architectural	Civil/Structural Engineering	Electrical Engineering	Mechanical Engineering	Information Technology Engineering		Sustainable Design	Meets schedules	
<b>FIRM NAME AND ADDRESS</b>	15	15	15	10	15	5	5	10	5	5	100

# APPENDIX E

## PRELIMINARY SELECTION BOARD A/E (MAJOR CONSTRUCTION) CRITERIA EVALUATION

Each Board Member should evaluate the A/E firms using the rating factors and values shown on the Evaluation Worksheet.

Each rating factor should be considered carefully when assigning point values.

The maximum assigned value for each rating factor may be 5, 10 or 15 based on its importance. The associated points for the range of applicability are depicted below:

<u>Max Value</u>		<u>Range</u>	
	<u>Low</u>	<u>Mid</u>	<u>High</u>
5	1-2	3-4	5
10	1-4	5-7	8-10
15	1-5	6-10	11-15

The following criteria have been established to assist the evaluator in assessing each rating factor.

3. Location of the firm: (Main or Branch Office)
  - a. High Range – Main Office located in Alabama.
  - b. Mid Range – Main Office located in adjacent state with Branch Office located in Alabama.
  - c. Low Range – Main and Branch Office(s) located in adjacent state.  
(\*NOTE: If no Main or Branch Office is located in adjacent state, then score will be 0).
4. Experience with State Code and Military & Unified Criteria. Rate each of the following elements separately.
  - a. Architectural
  - b. Civil & Structural Engineering
  - c. Electrical Engineering
  - d. Mechanical Engineering
  - e. Information Technology Engineering
  - f. Sustainability Projects
5. Experience with design and construction of military / military support facilities.
  - a. High Range – At least one of each type of facility as noted on project announcement.

- b. Mid Range – At least one type of facility as noted on project announcement.
  - c. Low Range – None of the facilities as noted on project announcement.
6. Ability to accomplish required services: Rate each of the following elements separately.
- a. Meets Schedules:
    - 1. High Range – no indication of failure to meet schedule.
    - 2. Mid Range – one indication of failure to meet schedule.
    - 3. Low Range – multiple indications of failure to meet schedule (\*NOTE: If no information is in packet, then score will be 0).
  - b. Quality of Work:
    - 1. High Range - no indication of failure to meet design customer design standards or to provide quality Supervision, Inspections and Overhead (SIOH) services.
    - 2. Mid Range - one indication of failure to meet design customer design standards or to provide quality Supervision, Inspections and Overhead (SIOH) services.
    - 3. Low Range - multiple indications of failure to meet design customer design standards or to provide quality Supervision, Inspections and Overhead (SIOH) services (\*NOTE: If no information is in packet, than score will be 0).

# APPENDIX F

## PRELIMINARY SELECTION BOARD A/E (MAJOR CONSTRUCTION) EVALUATION WORKSHEET

DATE: \_\_\_\_\_

PROJECT: \_\_\_\_\_

\_\_\_\_\_

Page \_\_\_\_\_ of \_\_\_\_\_

		Experience with State Code and Military & Unified Criteria						Experience with this type Facility	Ability to accomplish required services		TOTAL POINTS
		LOCATION OF AE FIRM	Architectural	Civil/Structural Engineering	Electrical Engineering	Mechanical Engineering	Information Technology Engineering		Sustainable Design	Meets schedules	
<b>FIRM NAME AND ADDRESS</b>	15	15	15	10	15	5	5	10	5	5	100

# APPENDIX G

## PRELIMINARY COMMISSIONING AGENT (CxA) SELECTION BOARD WORKSHEET

DATE: \_\_\_\_\_

PROJECT: \_\_\_\_\_

Page \_\_\_\_\_ of \_\_\_\_\_

		Experience with State Code and Military & Unified Criteria						Experience with this type Facility	Ability to accomplish required services		TOTAL POINTS
		LOCATION OF CxA FIRM	Architectural	Electrical	Mechanical	Plumbing	IT		LEED	Meets schedules	
<b>FIRM NAME AND ADDRESS</b>	10	10	10	10	10	10	10	10	10	10	100

# APPENDIX H

## CRITERIA FOR A/E or CxA EVALUATION

### AL ARNG FINAL SELECTION BOARD

A set of questions and evaluation criteria will be developed by the President for each board with assistance from the CFMO and other stakeholders in the project. Each set of questions will be tailored to the scope and nature of the design(s) that the board is being held for and used as a basis of assigning points to candidate interviews as a basis for selection.

Prior to the individual interviews the members will review the SF 330s of the candidate firms as well as the questions of the board and ensure they understand the nature of the question and how criteria for points assignment should be applied to the answers.

Each Board Member should evaluate the A/E firms using the rating factors and values shown on the Evaluation Worksheet in Appendix E.

Each rating factor should be considered carefully when assigning point values.

# APPENDIX I

## FINAL SELECTION BOARD WORKSHEET

DATE: \_\_\_\_\_

PROJECT: \_\_\_\_\_  
\_\_\_\_\_

	QUESTION 1	QUESTION 2	QUESTION 3	QUESTION 4	PRESENTATION	TOTAL POINTS
NAME AND ADDRESS OF FIRM	0-4	0-4	0-4	0-4	0-10	26

# APPENDIX J

## Preliminary Selection Board A/E (Master Planning) Evaluation Criteria

**Selection Criteria for:** Master Planning and Miscellaneous Engineering Activities [Real Property Inventories, Geospatial Information Systems (GIS Capabilities), Facility Energy Audits, Master Planning and Real Property Development Planning Activities, and Facility Utilization Surveys].

### Preliminary Selection Board -

1. **(Maximum of 40 Points) Professional Portfolio Review & References:** This will be an evaluation of professionally related performance metrics utilizing the provided "Portfolio" and evaluation of services provided as reviewed with the professional references found in the submission. The Selection Board will evaluate professional portfolios with previous project type experience in real property inventories, GIS capabilities, Facility Energy Audits, Master Planning and Real Property Development Planning Activities as they pertain to the selected type services.

A. **(10PTS) Portfolio Review and References (Credentials / Certifications):** Interested A&E Firm shall provide evidence in their submittal of team member credentials / certifications which include, but are not limited to, Certified Energy Manager, GIS Training Certificates, Real Property Training Certificates, and Master Planning Training Certificates. Evaluation shall be assessed as follows:

- 1) Evidence of Credentials / Certifications in all 4 Fields (Energy, GIS, Master Planning, and Real Property): 10 PTS
- 2) Evidence of Credentials / Certifications in 3 of the 4 Fields (Energy, GIS, Master Planning and Real Property): 7.5 PTS
- 3) Evidence of Credentials / Certifications in 2 of the 4 Fields (Energy, GIS, Master Planning and Real Property): 5 PTS
- 4) Evidence of Credentials / Certifications in 1 of the 4 Fields (Energy, GIS, Master Planning and Real Property): 2.5 PTS
- 5) Failure to provide evidence of Credentials / Certifications in any of the Fields (Energy, GIS, Master Planning and Real Property): 0 PTS

B. **(10PTS) Portfolio Review and References (CAC Enabled Access):** Interested A&E Firms shall provide evidence of team members with Common Access Card credentials and sponsorship of team member composition. Not all team members are required to have this credentialing; however, Evidence shall be provided as a checklist item on an individual's resume only within the packet submittal. Evaluation shall be assessed as follows:

- 1) A&E Firms currently have team members with Common Access Card credentials: 10 PTS
- 2) A&E Firms currently have team members who have submitted applications for sponsorship and Common Access Card credentials: 5 PTS
- 3) A&E Firms who currently do not have team members with Common Access Card credentials nor have the team members submitted applications for Common Access Card credentialing: 0 PTS

C. **(10PTS) A&E Board Team Member Composition:** Interested A&E Firms shall provide resumes in the SF 330 submittals for all team members, to include an organizational structure highlighting the in-house capabilities versus consultant capabilities. Evaluation shall be assessed as follows:

- 1) A&E Team Members Capabilities In-House with team members from all 4 Fields (Energy, GIS, Master Planning and Real Property): 10 PTS
- 2) A&E Team Members Capabilities In-House with team members from 3 Fields (Energy, GIS, Master Planning and Real Property): 7.5 PTS
- 3) A&E Team Members Capabilities In-House with team members from all 2 Fields (Energy, GIS, Master Planning and Real Property): 5 PTS
- 4) A&E Team Members Capabilities In-House with team members from all 1 Fields (Energy, GIS, Master Planning and Real Property): 2.5 PTS
- 5) A&E Team Members Capabilities In-House with team members from all 0 Fields (Energy, GIS, Master Planning and Real Property): 0 PTS

**D. (5 PTS) References Evaluations:** Interested A&E Firms shall provide references with subject matter expert points of contact (last known) for past projects which they have worked within this field. Evaluation shall be assessed based on a standard questionnaire which will be utilized asking project specific related questions [budget, project schedule, delivery and submittals, and administrative / procedures followed during contracting (i.e., contract document submittals, amendment requests, change orders, pay applications, etc.)].

**E. (5 PTS) Department of Defense Project Experience:** Interested A&E Firms shall provide executive summary details on past project experience working with Department of Defense components in any of the fields listed (Energy, GIS, Master Planning and Real Property). This Executive Summary shall highlight project details, including Scope, Budget, Project Schedule and A&E's summation of the product. Evaluation shall be assessed as follows:

- 1) Past Department of Defense Project Experience with more than 5 Projects: 5 PTS
- 2) Past Department of Defense Project Experience with 2-4 Projects: 2.5 PTS
- 3) Past Department of Defense Project Experience with 1 project or less: 0 PTS

**2. (Maximum of 40 Points) Resources and Capability:** The Selection Board will evaluate the A&E's training and team member composition to assess the resources and capabilities within the firm to perform the selected type projects.

**A. (10 PTS) Master Planning / Real Property Staff:** Interested Firms shall demonstrate the team members composition for conducting master planning and real property type activities, to include real property inventory and facility utilization, project programming document charrettes, real property development planning and installation master planning. Evaluation shall consist of a comprehensive review of the number of team members and their individual, directly relevant number of years of experience in participating in these types of projects and will be assessed as follows:

- 1) 1-4 Master Planning / Real Property Staff Members with more than 20 years of experience: 10 PTS
- 2) 1-4 Master Planning / Real Property Staff Members with more than 10 years but less than 20 years of experience: 7.5 PTS
- 3) 1-4 Master Planning / Real Property Staff Members with more than 5 years but less than 10 years of experience: 5 PTS
- 4) 1-4 Master Planning / Real Property Staff Members with less than 5 years of experience: 2.5 PTS

**B. (10 PTS) Energy Management Professionals:** Interested Firms shall demonstrate the team members composition for conducting facility energy audits, facility energy conservation planning, and renewable energy project planning and programming, to include life cycle cost analyses. Evaluation shall consist of a comprehensive review of the number of team members and their individual, directly relevant number of years of experience in participating in these types of projects and will be assessed as follows:

- 1) 1-2 Energy Management Professionals with more than 20 years of experience: 10 PTS
- 2) 1-2 Energy Management Professionals with more than 10 years but less than 20 years of experience: 7.5 PTS
- 3) 1-2 Energy Management Professionals with more than 5 years but less than 10 years of experience: 5 PTS
- 4) 1-2 Energy Management Professionals with less than 5 years of experience: 2.5 PTS

C. **(10 PTS)** Geospatial Information Systems Staff: Interested Firms shall demonstrate the team members composition for the inclusion of geospatial information systems (GIS) programs and geodatabase management into all types of projects (master planning, energy related project planning and programming, and real property management) utilizing the Spatial Data Standards for Facilities, Infrastructure and Environment (SDSFIE). Evaluation shall be assessed based on whether GIS capabilities are in-house or performed with consultants and the number of staff available to perform these tasks.

- 1) 2 GIS Staff Members In-House: 10 PTS
- 2) 1 GIS Staff Members In-House: 7.5 PTS
- 3) 2 GIS Staff Members utilizing a consultant: 5 PTS
- 4) 1 GIS Staff Members utilizing a consultant: 2.5 PTS

C. **(10 PTS)** Workload Evaluation versus Team Member Composition: Interested Firms shall demonstrate the number of projects and which types of projects each team members are currently working. This shall include the team member, project type, project scope, project schedule duration and completion date. The project scope shall include one or two sentences with the nature of the work being performed. If the team member only has a select portion of that instrument, provide the details of that portion of the project (i.e., working on master plan but are only responsible for the development of the Area Development Plan or working on a real property inventory but are only responsible for the data entry into Real Property Database of Record). Evaluation shall be assessed as follows:

- 1) 3-5 Team Members working 5 or less projects concurrently: 10 PTS
- 2) 3-5 Team Members working more than 5 but less than 10 projects concurrently: 7.5 PTS
- 3) 3-5 Team Members working more than 10 Projects but less than 15 concurrently: 5.0 PTS
- 4) 3-5 Team Members working more than 15 Projects: 2.5 PTS

# APPENDIX K

## Preliminary Selection Board GIS (Geospatial Information System) Evaluation Criteria

**Selection Criteria for:** Information Technology Visualization & Mapping Imagery Engineering Activities for Real Property Inventories, updates, and Geospatial Information Systems (GIS) Capabilities. Providing the ALNG with spatial and/or non-spatial data in support of the ALNG IGI&S Common Installation Picture (CIP) requirements stated in DOD Instruction (DODI) 8130.01 and provide a foundational map depicting DOD installations and sites as defined in DODI 4165.14. All Recipient's must agree to adopt or establish operating procedures and physical security measures designed to protect these Data from inadvertent release or disclosure to unauthorized third parties. Recipient's must agree to accept these Data "as is" without any Government representation as to suitability for intended use or warranty whatsoever. This disclaimer does not affect any obligation the Government may have regarding Data specified in a contract for the performance of that contract. Finally, Recipient's must agree to indemnify and hold harmless the Government, its agents, and employees from every claim or liability, including attorney's fees, court costs, and expenses arising out of, or in any way related to, the misuse or unauthorized modification, reproduction, release, performance, display, or disclosure of Data received from the Government with restrictive legends by the Recipient or any person to whom the Recipient has released or disclosed the Data.

Integrating our existing GIS framework for NGB Spatial Data Standards for Facilities, Installations, and Environment (SDSFIE), ESRI (Environmental Systems Research Institute, Inc.) platform and Alabama Army National Guard business requirements for managing data & projects for installations, environment, site analysis, and decision-making in leadership contexts involving applications and multiple layers.

Our grading criteria for the Preliminary Selection Board -

### **Data Development, Acquisition, and Structuring (25 points)**

#### 1. Data Collection Standards

**Source Validation:** GIS utilizes three broad data formats consisting of Vector, Raster, and LiDAR/Elevation Surface Models.

*Vector:* this data is often referred to as features and consists of points, lines, and polygons. Ensure data is collected from reliable sources that meet the NGB Quality Assurance Plan and ALARNG business needs for each layer (e.g., extracted from high-resolution imagery, LiDAR products, field surveys, approved databases).

*Rasters:* this data includes Real Color Imagery, Color Infrared Imagery, and Pictometry. Raster data must be collected and processed to meet current NGB standards. Collection methods include fixed-wing aircraft and drone. Prior approval for drone flights will be required and drones must be on the Blue UAS Cleared List.

**Data Formats for Vectors/Features:** Collect data in provided NGB SDSFIE file geodatabase or ALARNG streaming services.

**Data Formats for Raster:** Raster data files will include Digital Orthographic Quadrangle's (DOQs) and SID files.

**Data Formats for LiDAR/Elevation Surface Models:** LiDAR data will be flown at resolutions that meet current NGB requirements and ALARNG business needs. LiDAR will include Full Ground.img (0.5meter), Full Ground LAS, Full Point Cloud LAS, LiDAR Control, Breakline data in file geodatabase, Digital Elevation Models (DEM) will be provided.

**Spatial Reference and Accuracy:** Must meet layer requirements provided in the latest NGB Quality Assurance Plans and/or ALARNG business requirements for resolution and accuracy. Must be collected in WGS1984, UTM 16N datum/projection.

## 2. Data Attributes

**Attribute Fields:** Must meet NGB Quality Assurance Plans and ALARNG business requirements.

**Metadata Standards:** Maintain metadata to document data sources, timestamps, and accuracy.

**Topology Rules:** All data will be assessed against ESRI's Geometry toolkit. Contractors should possess a working knowledge of creating topology rules to ensure data integrity. Adjacent features may share a common edge. It is important that data features are topologically integrated. Adjacent polygons should share edges, i.e., street centerlines and census blocks; parcel lines do not overlap, or utility lines connect at endpoints and to transformers, meters, or manholes and so forth.

## 3. Data Integration

**Interoperability:** Use formats that facilitate integration with other systems (e.g., CAD files, BIM for port infrastructure).

**Normalization:** Ensure data attributes follow standard naming conventions and units (e.g., metric system for distances).

## **Map Visualization (15 points)**

### 1. Map Layering and Symbology

**Existing Templates and Styles:** GIS will provide existing templates and styles. Often these require manipulation and connection repairs. Must have experience repairing dynamic label code, layer connections, symbology, and legends.

**Create Custom Templates and Styles:** Custom Template/Style development. This includes feature symbology, labels, and legends. Extensive experience with scripting and coding languages are a requirement: Python, Arcade, VBS. Contractor must have experience creating scale dependent symbology and labels

**Content and Data:** All cartographic products will be produced from provided SDSFIE data. Should new data need to be developed, it will be developed in the SDSFIE data format and adhere to all Quality Assurance Plans. Automation skills for migrating non-SDSFIE data into a new format and converting attributes into required coded domains are necessary.

## 2. Cartographic Products

**Software:** ArcGIS Pro software must be utilized when developing cartographic products. NGB provides standardized templates in the .aprx format. All vector data and map products will be developed using the approved version of ArcGIS Pro software.

**Files:** ArcGIS Pro map packages will be delivered for all hardcopy/digital products that are produced. All map exports from the .aprx will be provided as geo pdf files.

### Site Analysis and Interpretation (15 points)

#### 1. Spatial Analysis Techniques

**Buffer Analysis:** Identify security buffer zones around facilities.

**Hillshade:** Generate Hillshade from high-resolution DEM for assessing physical features on the landscape to support environmental and installations missions.

**Slope:** Generate slope analysis from DEM to support environmental and installations missions. Analysis will facilitate the visualization of 5-degree, 10-degree, and greater than 10-degree slopes.

**Elevation Vectors:** Generate Contours in file geodatabase (0.5 meter and 3 meter intervals).

#### 2. 3D Modelling

**Digital Twin:** Use ArcGIS pro 3D modeling to visualize existing and planned.

**LiDAR LAS Classification:** LiDAR will be processed and classified to meet American Society for Photogrammetry and Remote Sensing (ASPRS) data categories 0-12, minimally.

#### 3. Risk Assessment

**Overlay Analysis:** Combine multiple data layers to assess vulnerabilities (e.g., physical security and environmental constraints).

**Life/Health/Safety:** Combine multiple data layers to reduce life/health/safety issues (e.g. landscape analysis to prevent accidents in overgrown areas, using slope overlay with other layers, create strategic evacuation plans)

### Decision Support System (DSS) Features (15 points)

#### 1. Design and Develop Custom GIS Applications for ArcGIS Enterprise

**Visual Dashboards:** Use platforms like ArcGIS Dashboards to present real-time data on road usage, port entry points, and security alerts.

**Key Performance Indicators (KPIs):** Include metrics like ticket response times, man-hour analysis, contract deadlines, and project/deliverables tracking.

#### 2. Report Generation

**Automated Reports:** Develop templates for periodic reports that summarize critical information for leadership.

**Custom Query Tools:** Enable leaders to extract tailored data (e.g., facility work order trends, timelines, and facility health).

### 3. Alert Systems

**Change Analysis and Data Call Timelines:** Develop real time Dashboard that displays timely alerts to allow for strategic planning (e.g. compare latest Real Property Inventory with Time-Enabled Construction and GIS Survey footprints to allow an informed, phased approach from multiple Sections to meet site inspection and PRIDE update requirements).

**Facility Health:** Develop real-time Dashboards that combine metrics from various GIS datasets that would allow leadership to quickly visualize facilities requiring attention. (e.g., comparison of energy data, work order tickets, expiring warranties, ISR, and Builder data).

**Resource Management and Fiscal Efficiency:** Track purchase requisitions against commodity codes, vendor identification numbers, and finance laws to prevent overspending outside of contracts and master agreements. Track equipment purchases and repairs against lifecycle schedules and warranties.

### Interpretation and Decision-Making (10 points)

#### 1. Spatial Data Analysis Tools:

**Density Maps:** Visualize soldier home-of-record zip codes for efficiently siting armories and training locations.

**Space Utilization:** Visualize interior and exterior spaces in reference to training requirements and allotments.

**Comparative Analysis:** Compare historical data with current metrics to identify trends (e.g. comparing energy usage data over time to pinpoint sites needing infrared flights/energy loss analysis).

#### 2. Scenario Planning:

**"What-If" Tools:** Run simulations to evaluate potential outcomes (e.g., relocating a Unit to a new location, planning projects, space analysis for new construction).

**Strategic Overlay:** Combine strategic objectives with GIS data to align decisions with broader goals.

### Capacity & Staff (20 points)

1. **(10 PTS) Geospatial Information Systems Staff:** Interested Firms shall demonstrate the team members composition for the inclusion of geospatial information systems (GIS) programs and data development into all types of projects (environmental, military operations, master planning, energy related project planning and programming, and Department of the Army real property management) utilizing the Spatial Data Standards for Facilities, Infrastructure and Environment (SDSFIE). Evaluation shall be assessed

based on whether GIS capabilities are in-house or performed with consultants and the number of staff available to perform these tasks, and whether staff has maintained knowledge through continuing education. A GIS Staff Member is defined as a professional trained in GIS that holds a professional certificate from an accredited university or that is a registered GIS Professional (GISP).

- a. 2 GIS Staff Members In-House: 4 PTS
- b. 1 GIS Staff Member In-House: 1 PTS
- c. 2 GIS Staff Members utilizing a consultant: 4 PTS
- d. 1 GIS Staff Member utilizing a consultant: 1 PTS
- e. GIS Staff Members hold 4 or more ESRI certificates, each, for annual continuing education: 4 PTS/Staff Member (maximum 6 PTS)
- f. GIS Staff Members hold 1 to 3 ESRI certificates, each, for annual continuing education: 1 PTS/Staff Member (maximum 4 PTS)

2. **(10 PTS) Workload Evaluation versus Team Member Composition:** Interested Firms shall demonstrate the number of projects and which types of projects each team members are currently working. This shall include the team member, project type, project scope, project schedule duration and completion date. The project scope shall include one or two sentences with the nature of the work being performed. If they team member only has a select portion of that instrument, provide the details of that portion of the project (i.e., working on master plan but are only responsible for the development of the Area Development Plan or working on a real property inventory but are only responsible for the data entry into Real Property Database of Record). Evaluation shall be assessed as follows:  
The Preliminary Board will provide the Contracting Office the list with a maximum of six (6) firms to be invited back to provide a presentation of their services, resources, and capabilities for the Final Selection Board.



## APPENDIX M

### PRELIMINARY SELECTION BOARD (Environmental) CRITERIA EVALUATION

Each Board Member should evaluate the A/E or Environmental firms using the rating factors and values shown on the Evaluation Worksheet.

Each rating factor should be considered carefully when assigning point values.

The maximum assigned value for each rating factor may be 5, 10 or 15 based on its importance. The associated points for the range of applicability are depicted below:

<u>Max Value</u>	<u>Range</u>		
	<u>Low</u>	<u>Mid</u>	<u>High</u>
5	1-2	3-4	5
10	1-4	5-7	8-10
15	1-5	6-10	11-15

The following criteria have been established to assist the evaluator in assessing each rating factor.

1. Location of the firm: (Main or Branch Office)
  - a. High Range – Main Office located in Alabama.
  - b. Mid Range – Main Office located in adjacent state with Branch Office located in Alabama.
  - c. Low Range – Main and Branch Office(s) located in adjacent state.  
(\*NOTE: If no Main or Branch Office is located in adjacent state, then score will be 0).
  
2. Experience with Environmental professional services (this may include the applicant specifically or specialized firms with which the applicant has an established relationship or retainer with). Rate each of the following elements separately.
  - a. Environmental Compliance
  - b. Natural/Biological Resources
  - c. Archaeological/Historical Resources
  
3. Experience with Environmental services for the military or on military or governmental properties (this may include the applicant specifically or specialized firms with which the applicant has an established relationship or retainer with)
  - a. High Range – At least one of each of the 3 major environmental subject elements noted in item 6 above.

- b. Mid Range – At least one of the 3 major environmental subject elements noted in item 6 above.
  - c. Low Range – None of the 3 major environmental subject elements noted in item 6 above.
3. Ability to accomplish required services: Rate each of the following elements separately.
- a. Meets Schedules:
    - 1. High Range – no indication of failure to meet schedule.
    - 2. Mid Range – one indication of failure to meet schedule.
    - 3. Low Range – multiple indications of failure to meet schedule (\*NOTE: If no information is in packet, then score will be 0).
  - b. Quality of Work:
    - 1. High Range - no indication of failure to meet design customer design standards or to provide quality Supervision, Inspections and Overhead (SIOH) services.
    - 2. Mid Range - one indication of failure to meet design customer design standards or to provide quality Supervision, Inspections and Overhead (SIOH) services.
    - 3. Low Range - multiple indications of failure to meet design customer design standards or to provide quality Supervision, Inspections and Overhead (SIOH) services (\*NOTE: If no information is in packet, than score will be 0).

# APPENDIX N

PROJECT: \_\_\_\_\_

Page \_\_\_\_\_ of \_\_\_\_\_

		Experience in Environmental Professional Services Areas						Experience working with the military/gov	Ability to accomplish required services		
		LOCATION OF AE FIRM	ENV Compliance	Biological/Natural Resources	Archaeological/Historical Res					Meets schedules	
<b>FIRM NAME AND ADDRESS</b>	10	15	15	15				10	5	15	85