Bay-Friendly Rated Landscape Program
Policies and Procedures Handbook v1.1
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Acknowledgement

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I. Introduction to Bay-Friendly Rated Landscapes

While many landscapes might be considered “green” or “sustainable,” all such landscapes are not equal. An effective way to foster sustainable landscape design, construction and maintenance is to encourage the private sector to participate in rating programs, which set quantifiable standards for what “sustainability” means. A third-party rating program gives sustainable landscape projects the credibility that comes from independent verification. It also provides a way for local governments to track sustainable landscape design and construction and its positive effects. Moreover, it assures owners and tenants that they are actually getting a landscape that is better for the owner, the community, and the greater environment.

Bay-Friendly Rated Landscape projects are designed and built looking through an environmental lens – the 7 Principles of Bay-Friendly-- which values practices and products that lessen or improve the ecological impact of our built urban and suburban landscapes. Project teams set and implement Bay-Friendly landscaping goals starting early in the design process, through construction, and often well into maintenance. Each project must meet or exceed the requirements on the Bay-Friendly Civic and Commercial Landscape Scorecard, implementing nine required practices and earning a minimum of 60 points. In addition, all of the implemented Bay-Friendly practices must be verified with a third-party Bay-Friendly Landscape Rater (Rater).

A Bay-Friendly Rated Landscape meets sustainable landscaping requirements that exceed standard practices in California. The Bay-Friendly Rated Landscape qualification was developed in collaboration with public agencies, landscape professionals, and nonprofit stakeholders to help implement and, wherever possible, surpass State mandated best management practices. The Program is managed by the Bay-Friendly Landscaping & Gardening Coalition (the Coalition), a California non-profit dedicated to reducing waste and pollution and conserving natural resources, while creating vibrant landscapes in the San Francisco Bay Area.

The Bay-Friendly Rated Landscape was originally piloted through StopWaste.Org in Alameda County, where all cities now require that new or renovated public landscapes be built to this standard. The Bay-Friendly Rated Landscape qualification addresses new site and major renovation construction through the Civic, Commercial and Multi-Family Landscape Scorecard and the New Homes Landscape Scorecard. The Coalition encourages local governments to leverage program resources to support voluntary, market-based programs and strategies. Bay-Friendly Rated Landscape projects seek to:

- Improve Environmental Health by using less water, pesticides, synthetic fertilizers and energy, generating less waste, retaining and treating storm water, and providing healthy habitat for pollinators, birds, native plants, beneficial insects, and people.
- Facilitate Compliance with other green building rating systems (such as LEED and GreenPoint Rated) and local, state and federal requirements (such as the California Water Efficient Landscape Ordinance and C.3 regulations).
- Offer a Standard of Performance recognizing that the landscape, developer and project team have met or exceeded an established environmental standard;
- Save Money. Resilient landscape projects that are drought- and pest-resistant reduce energy, water, fertilizer, pesticide consumption, and require fewer and shorter visits by maintenance staff.
- This handbook provides the information you need as a Bay-Friendly Rater or Advisor to understand the rating process, your rights, and your responsibilities. The distinct policies
for the New Civic, Commercial, and Multi-Family Landscape Scorecard are addressed in the appropriate sections (e.g., Rating Process).

As a Bay-Friendly Rater or Advisor, you play a critical role in the delivery of sustainable landscape projects:

- The project team relies on your advice and verification that projects are built in accordance with the protocols of Bay-Friendly landscape practices.
- Public agencies rely on your verification that developers, designers, and contractors have faithfully fulfilled the measures on the Bay-Friendly Landscape Scorecard.
- The Coalition relies on your results to provide credibility and quality to the Bay-Friendly Rated brand.
II. Roles, Responsibilities and Requirements

Eligibility Requirements

To become a Bay-Friendly Qualified Rater or Advisor for civic, commercial and multifamily landscapes, you will be required to:

1. Complete the Bay-Friendly Rater Training for new Civic, Commercial & Multi-Family (CC&MF) Landscapes by attending all classes and passing a final exam.

2. **Raters:** Hold current and in good standing Qualification as Bay-Friendly Landscape Professional
   **Advisors** (only): Have graduated from the Bay-Friendly Training and Qualification

3. Submit documentation of one or more of the following current licenses, degrees, certifications or experience:
   a. Landscape architect license
   b. Landscape contractor license
   c. Irrigation auditor training
   d. QWEL certification
   e. Build It Green's Certified Green Building Professional or Rater
   f. Sonoma State University, Sustainable Landscaping Certificate with professional landscape experience
   g. LEED accreditation
   h. Public agency experience in planning, design, construction or management of landscapes
   i. Others subject to approval

4. Sign the Bay-Friendly Code of Rater Conduct and Logo Use Agreements

The Rater’s Role

The Rater works with landscape architects/designers, contractors, lenders, public agencies, owners, and the Coalition in a collaborative fashion to maximize the sustainable features and compile supporting documentation. The Rater will submit verification results to the Coalition to demonstrate project eligibility for Bay-Friendly Rated Qualification. The Rater also must keep hardcopy documentation of verification results on file for five years and make the documentation available to the Coalition in the event of an audit.

A Rater does not provide design assistance or write specifications for a project for which he/she acts as the Rater. However, it is helpful for a Rater to have experience beyond a single family home landscape and be comfortable reading construction documents, including specifications and landscape plans, sections and details.

The Coalition has created several documents to assist in the submittal process. These documents are located in the Appendices of this Handbook.

- Appendix A: Definition of Resources for Advisors and Raters provides definitions of various documents and tools developed by the Coalition.
• Appendix B: Quick Start Guide is a one-page flyer summarizing the process for submitting a project.
• Appendix C: Bay-Friendly Scorecard Practices Most Frequently Implemented. Raters can use this information to target practices that seem to be implemented most often and therefore are likely to be easier to accomplish.
• Appendix D: Bay-Friendly Rated Landscape Submittals List provides a concise guide to the submittals and fees required at each step of the rating process.

The Advisor’s Role

Like that of the Rater, the role of the Advisor is to understand the rating system, the process, and the criteria for each measure. However, the Advisor, as a member of the design team, will guide the project to meet the thresholds for the selected measures, clarify questions on the process and generally allow the project team to work efficiently and effectively with the Rater. Therefore, the Advisor should understand the process and steps to conduct a rating, the resources available to the project team, and the roles and responsibilities of the parties involved. The Advisor will not submit an application or documentation to the Coalition and will not rate the project. The Advisor may be in contact with the Coalition to discuss a specific project. The Advisor can also have dual roles as the project landscape architect, designer or project manager. The Rater cannot have those dual roles in order to retain the integrity of a third-party.

The Coalition’s Role

The Coalition will provide the following administrative and technical support services:

• Maintain a list of Qualified Bay-Friendly Raters and Advisors on its website
• Provide training and orientation for Raters, Advisors, landscape professionals, builders, contractors, local government staff, and other interested parties
• Provide technical support to Raters and Advisors
• Maintain forms, templates, guidebooks, manuals, and other resources necessary for program implementation
• Maintain a tracking system that documents program activities and results, including participating projects, Raters, landscape professionals, builders, contractors, lenders, realtors, and other stakeholders
• Facilitate coordination and information exchange between various stakeholders
• Implement quality assurance procedures to verify rating results, including random audits of Raters and rated projects
• Review Rater submittals and supporting documentation as necessary
• Approve Requests for Innovations and Signage.
• Issue Bay-Friendly Rated Letters of Qualification to the Rater, Client and any other designated recipients.

Rater and Advisor Requalification Requirements - PENDING

Qualification as a Bay-Friendly Rater will be valid for two years after attending and passing the training. Although the details are pending, requalification will require submitting a renewal fee, evidence of continuing education and completing a survey to provide us with information on your work as a Bay-Friendly Rater. You will be notified of these details once they are finalized, and you will be sent a replacement for this page of the Policies and Procedures Handbook.
III. Rater Code of Conduct

For many owners, designers, developers, builders, contractors, and public agencies, the Bay-Friendly Landscape will be the primary point of contact with the Bay-Friendly Rated Landscape Program. Therefore, it is essential to the integrity of the Program that the Rater carry out their work in a professional and ethical manner, consistent with the Bay-Friendly Landscape Rater Code of Conduct. Approval of an individual to work as a Bay-Friendly Landscape Rater is at the discretion of the Coalition, and will be based, in part, on the Rater's adherence to the Code of Conduct set forth below.

All Raters are committed to providing professional, high-quality service to their clients and to the general public. This Code of Conduct will serve as a basis for ethical decision-making in decisions regarding the performance of the activities and duties undertaken by Raters. It sets forth principles and rules of conduct enforced by the Coalition through specific procedures set forth in the Judicial Procedures section below. This Code of Conduct is applicable to all qualified Raters.

1. Raters shall avoid conflicts of interest or activities that compromise, or appear to compromise, professional independence, objectivity, or rating integrity. In particular, Raters shall not:
   - Perform or offer to perform, for an additional fee, any design modifications or repairs to a project on which the Rater or the Rater's company has prepared a rating report in the past 12 months.
   - Rate any property in which the Rater or the Rater's company has a central role in the design, construction, development or maintenance of the project (including the landscape architect, landscape designer, irrigation designer, architect, engineer, general contractor, landscape contractor, or subcontractors). Rate any property in which the Rater or the Rater's company has any financial interest in the ownership or transfer of the property, including, as a lender or equity investor. It is acceptable to be the Bay-Friendly Landscape Rater and the Green Point Rater on a single project.
   - Rate any property in which the Rater or the Rater's company has any financial or familial ties with the owner, developer, landscape architect, landscape designer, irrigation designer, architect, engineer general contractor, landscape contractor, or subcontractors, or other participants in the project.
   - Rate any property over which the Rater exercises any regulatory oversight by virtue of election or appointment to a City/County Board, Commission, Committee, or staff position with an advisory or regulatory role over building or planning issues, unless the Rater is performing the rating in his or her official capacity as a representative of the City/County/State.
   - Offer or deliver any compensation, inducement or reward to the owner of the rated property, the broker, or agent, for the referral of any business to the Rater or the rating company, or for inclusion on a list of recommended Raters, preferred providers, or similar arrangements.
   - Rate properties where the employment itself or the fee payable for the rating is contingent upon the conclusions in the rating report, pre-established findings, or the close of escrow.
   - Accept compensation, directly or indirectly from product or service suppliers for recommending those businesses to rating clients.
• Rate properties where there are any other perceived or actual conflicts of interest that would compromise the ability of the Rater to remain objective in the exercise of his/her duties.

2. Raters shall act in good faith toward each client.

3. Raters shall perform services and express opinions based on honest conviction and only within their areas of education, training, or experience.

4. Raters shall be objective in reporting and not knowingly understate or overstate the significance of reported findings.

5. Raters shall not disclose to third parties other than the Coalition any personal or confidential information about the project, members of the project team, client, seller, tenant, or others involved in the rating without the approval of the individual(s) affected.

6. Raters shall not disclose rating results to anyone other than the Coalition and the Client or the Client’s agent without the approval of the Client.

7. Raters shall avoid activities that harm the public, discredit themselves, or reduce public confidence in the profession and the Bay-Friendly Landscaping program.

8. Raters shall maintain professional relationships with clients, colleagues and others associated with the inspection without regard to race, color, national origin, gender, religion, age, sexual orientation, or disability.

9. Raters’ advertising, marketing, and promotion of services or qualifications shall not be fraudulent, false, deceptive, exaggeration or misleading.

10. Raters shall abide by Coalition bylaws and guidelines in the use of the program logo and other Bay-Friendly Landscaping materials.

11. Raters shall respond professionally to Client or Coalition concerns and complaints about a rating.

12. Raters shall report substantial and willful violations of this Code to the Coalition.

Judicial Procedures

The Coalition reserves the right to revoke a Rater’s credentials for failure to adhere to the appropriate and expected levels of conduct.

The Coalition’s Bay-Friendly Rated Landscape Oversight Committee (the “Oversight Committee”) is responsible for investigating complaints and taking any necessary enforcement actions. The following procedures apply to the investigation and enforcement of conduct issues:

• The Committee may initiate a conduct investigation in response to a complaint or other evidence suggesting possible Rater misconduct.

• The Committee will notify a Rater in writing that an investigation is being initiated. The notification will describe the nature of the investigation, request any documentation the Committee needs to review, and outline the Rater’s rights and responsibilities.

• The investigated Rater will be given at least two weeks to respond in writing and submit any requested documentation. Failure to provide requested documentation will be interpreted as admission of guilt.

• The Rater may request a teleconference or an in-person meeting with the Committee, to be scheduled at a mutually convenient time but not more than one month after the Committee notifies the Rater of the investigation.
• While an investigation is underway, the Coalition will suspend review of rating results from the investigated Rater or rating company. No Bay-Friendly Landscape final ratings will be issued until the investigation is successfully resolved.

• At the end of the investigation, the Committee will issue a written report stating whether misconduct has occurred, whether the misconduct was inadvertent or willful, the factual basis for its conclusions, and any penalties or remedies.

• In cases of inadvertent misconduct, the Committee has discretion to formulate suitable remedies to resolve past problems and prevent recurrence. Remedies may include a probationary period for the Rater.

• Cases of willful misconduct are cause for immediate and permanent revocation of a Rater’s qualification.

• In the event that a project needs to be re-rated to resolve any conflict of interest concerns, Coalition staff or representative(s) will perform the rating. The Rater will be responsible for reimbursing the Coalition for the cost of the rating, regardless of the rating results.
IV. The Rating Process

The rating process for Bay-Friendly Landscapes requires an examination of the design and construction of a landscape to determine its success in meeting criteria that address a broad range of sustainability issues. By evaluating site selection, stormwater management, site drainage, earthwork, soil health, materials selection, plant selection, irrigation, and maintenance practices, the rating process addresses water quality, water and energy efficiency, habitat value, and environmental health. Ratings are not intended to identify potential design, installation or maintenance defect issues.

The Bay-Friendly Rated Landscape qualification seeks to:

- Promote best practices in sustainable landscaping and gardening
- Establish a highly visible and easily understood “Bay-Friendly” consumer label to help owners distinguish sustainable landscapes from conventional ones, and to create market value for sustainable landscapes
- Maintain the integrity of the Bay-Friendly label through credible third-party verification
- Document the full extent of benefits that sustainable landscape practices deliver

The minimum requirements for a Bay-Friendly Rated Landscape using the Civic, Commercial and Multifamily Scorecard include accomplishing nine required measures and attaining a total score of 60 points out of a total of 219 points. See the Rating Manual and Scorecard to learn more about the specific requirements of the rating system.

Prepare for the Project

1. **Contract with the Client** (e.g., the Architect, Landscape Professional, Builder or Project Owner) to rate the participating landscape project(s). It is the Rater’s responsibility to ensure that the Client is empowered to submit the project for Bay-Friendly rating. Contractual terms and fee structure for rating services are solely between the Rater and the Client to negotiate. Please note:
   - The Rater’s fee structure should include the project application and Letter of Qualification fees paid to the Coalition. The Coalition will invoice the Rater for the project application and qualification fees.
   - The Bay-Friendly Rated Landscape fee structure can be found in the “Fee Structure” section of this document.
   - The Project Application Fee is due with the initial application submittal.
   - The Certificate fee(s) will be billed at the time of Final Rating Results Submittal. The Rater should be sure to account for processing and payment received when submitting final rating results.

2. **Initial Meeting with Client**. The Rater will meet with the project design team (client, owner, landscape professional(s), builder, architect, trade contractors, etc.) as early in the process as possible to review the project scope, identify the Bay-Friendly Landscaping measures the project will seek to earn, and refine the verification scope. The Rater should make sure everyone on the design and construction team understands the verification protocols in detail and what the Rater will need from them to be successful in the process.
When meeting with the Client, identify targeted Bay-Friendly Landscape measures in the BF Civic, Commercial and Multifamily Landscape Scorecard. (Note: There is also a New Homes Landscape Scorecard for production home developments that is in the pilot phase.)

When selecting targeted measures for the project at the initial meeting, the Rater should identify more points than the minimum required, as a buffer. During the rating process, it is not uncommon for the Client to forego practices or acquire new practices. It is expected that the project's initial planned score will differ from the score at final submittal. The Rater does not need to resubmit an interim application form or Scorecard to reflect these changes. Changes can be reflected at final submittal. It is good to note at this initial meeting that 5 points can be earned if a Bay-Friendly Site Analysis form and site map are completed and submitted to the Rater by the Construction Documents (CD) phase. Also, it is important to consider stormwater goals and practices early in design, as these measures become increasingly difficult to add later in the process.

It is recommended that at this initial meeting the Rater designates a point person on the project team (client, landscape architect or prime consultant) to communicate directly with during the Rating process.

Note: An Advisor can work with the project team prior to the Client hiring a Rater and can assist the Client with identifying measures to be targeted for the project as well as help complete the planning phase Scorecard.

In preparation for the first meeting with the Client, the Rater should always download the latest version of key documents from the Coalition website (http://www.bayfriendlycoalition.org/) See Appendix B: Quick Start Guide.

- Rating Manual updates
- Policies and Procedures Handbook updates
- Accountability Form
- Project Application - includes:
  - Project Intake Form
  - Project Data Form
  - Water Calculator
  - Scorecard
  - Innovation Request Form
  - Final Submittal Form
  - Evaluation
- Rater Checklist
- Site Analysis Form
- Debris Recovery Plan
- Plant Legend Template

**Project Application – Initial Submittal**

Before submitting the project application, ensure that the Client:

- understands the rating system
- is aware of the Rating Fees
is committed to achieving the Bay-Friendly Rating

Based on the initial meeting with the Client, the Rater will electronically submit the Application to the Coalition for an initial review. All documentation must be completed properly in order for Coalition staff to review the project. For the initial submittal, the completed application consists of the following documents:

1. **Project Intake Form**
   - Project name, address
   - Project contact information
   - Note: Project Team to provide Rater with information.

2. **Project Data Form**: If information is not yet determined, incomplete or unavailable, provide an estimate or state that the information is unknown at the time of application.
   - Type of Project
   - Project Costs
   - Estimated square footage information
   - Note: Project Team to provide Rater information to complete.

3. **Water Calculator**: Similar to the Project Data Form, detailed information may not be known at the time of the initial submittal. The Project Team should provide as much information as possible.

4. **Scorecard**: The targeted measures should be selected and all minimum requirements must be met. Note: Rater to complete Scorecard with goals agreed upon at initial meeting

5. **Project Application Fee – Rater to Pay**. The fee is $400 and can be paid over the phone by credit card by or by mailing a check to the Coalition. Be sure all information on the Project Application is accurate. Once the application is processed, Coalition staff will issue the Rater a review of the application via e-mail.

**Verify and Gather Documentation**

1. **Technical Assistance (Recommended)** It is most cost-effective to review plans beginning in the earlier phases of design and throughout the design process to keep the project team on track for achieving their goals. This ensures that any changes required for compliance can be made before the bid process, avoiding costly change orders. It is important that as you provide technical assistance you retain the integrity of the third party rating system by not designing or creating documentation. It is recommended that the following technical assistance be provided:

2. **Initial Plan Review**. It is recommended that an initial plan review occur during the design phase and at least one meeting between the Rater and the rest of the Project Team should take place to review the Scorecard and discuss the practices and points the project will seek to achieve.

3. **Second Plan Review**. It is also recommended that a second plan review occur before 100% CD so that corrections can be made before the bid process.

4. **Preconstruction Meeting**. It is also recommended that preconstruction meeting is held to review goals with design team and contractors to ensure compliance.

5. **Submittal Reviews**. It is also recommended that the Rater review key contractor submittals such as mulch and compost suppliers to ensure compliance.

**Innovation and Signage Submittal** It is recommended that innovation and signage be submitted for review by the Coalition early in the design process. See Innovation Measures (Section V) for more information. If the project is exhibiting exemplary performance for a particular measure or is adding a measure not covered by the Scorecard, the Rater may
consider submitting for Innovation points. Requests for Innovations and measures that need Coalition approval should be submitted before the final rating submission. Follow Innovation submittal protocols described in the “Innovations” section of this Handbook.

6. **Rate Project.** The verification methodologies consist of three parts: **Plan Review**, the **Site Visit** (field verification), and a review of other **Documentation**. Some combination of Plan Review, Site Visit, and Documentation review is usually required for compliance.

Throughout the project, the Rater will need to compile various types of project information to verify the implementation of Bay-Friendly practices. As the Rater gathers this information, they will pass or fail each practice on the Scorecard to automatically calculate the Bay-Friendly Landscape score.

Raters must retain documentation of verification results for each credit on file for five years after the date of final qualification, and must make such file(s) available to the Coalition if a quality assurance audit is conducted for the project. Documentation should be kept organized and readily accessible in preparation for an audit. See the “Quality Assurance / Project Audit” section in this Handbook for further information.

a. **Plan Review** Reviewing a set of project plans can sometimes provide verification of compliance for a practice. The term “plans” in this case is taken to represent construction drawings (CD’s) along with other supporting documentation, like specifications and notes. For measures that call for Plan Review, drawings must be at least from 100% CD submittal as plans from early phases lack detail and will change over time. Plans and specifications from earlier phases (e.g., Schematic Design, Design Development drawings or 50%CD’s) are NOT accepted for verification unless it is specifically stated in the Rating Manual’s Verification section for a practice that such plans are acceptable. Plans can also include worksheets that must be completed and submitted to the local agency, such as those required to demonstrate that the project meets the adopted Water Efficient Landscape Ordinance, although this is not necessary. Consult the Rating Manual for details on verification methods and acceptable documentation. Following is a partial list of the types of documentation gathered during Plan Review:
   - Drawings
   - Specifications
   - Notes

b. **Site Visit** Usually one site visit, post construction, is necessary to verify compliance with numerous Bay-Friendly practices. It is rare that a landscape is built exactly to plan. There may also be times when an earlier visit during construction is valuable. Examples of post-construction verification practices include: confirming that the weather-based irrigation controller specified is installed and functioning, verifying that recycled content materials such as fencing, site furnishings or recycled mulch are used, verifying that turf is installed as planned with no sprinkler heads in sections less than 8 feet wide, etc. For all site visits, the Rater should take photographs of each practice being verified, label the photos and archive them in an orderly manner. If the Coalition performs an audit, these photographs will be required as proof that the rating of the project is correct. Below is a partial list of the types of documentation associated with the Site Visit:
   - Photos
   - Field Notes

c. **Documentation** In some cases, the information needed to verify compliance cannot be found on plans or through observation in the field. In such cases, other
documentation is necessary to verify compliance with the measure. Below is a list of common types of documentation a Rater may need during the verification process:

- Receipts
- Maintenance Manual and Task List
- Other Documents
- Product Cut Sheets
- Technical Data Sheets
- Bay-Friendly Site Analysis Form
- Bay-Friendly Accountability Form

The Accountability Form is intended to reduce the paperwork burden by allowing the individual responsible for the particular measure to sign off that the measure has been implemented. Also, as projects are rarely constructed exactly per plans, accountability forms are often used to verify the project still meets the intent of the credit after installation. The individual signing the Accountability Form must be the person specified for each practice in the Rating Manual, such as the owner, landscape architect/designer, developer, contractor, or other designated professional.

While an Accountability Form may streamline the verification process, the person signing the forms must be prepared to show proof of compliance if the measure is challenged by the rater or audited. If a Rater finds that an Accountability Form signed does not comply with site visit or other form of documentation they must request proof of compliance from the person signing the Accountability Form confirm where the discrepancy lies. If documentation cannot be provided for the credit in question no points will be given.

During an audit, if it is found that the implementation of practices confirmed on the Accountability Form does not meet the standards outlined in the Scorecard or Rating Manual, signatures from the Responsible Party may no longer be accepted as verification.

**Project Application – Final Submittal**

After compiling documentation and completing the Data Collection Form, the final score for the project will be automatically calculated. The Rater will electronically submit final results and fee(s) to the Coalition. The Rater should make sure to provide the Client with a copy of the final results for the project.

The staff will review the final submittal prior to issuing a Letter of Qualification. Documentation must be complete and properly filled out to complete the review process.

A completed final submittal consists of the following documents:

- Final Project Submittal Form
- Updated Project Application
- Updated Project Data Form
- Rater Checklist
- Final Scorecard
- Updated Water Savings Calculator
• Evaluation
• Accountability Form
• A project photo (optional, used for promotional opportunity)
• Project Completion Fee - includes one Letter of Qualification and Bay-Friendly Rated Sign
• Additional fees as applicable for additional signage or Letters of Qualification.

The Rater must submit final rating results at www.BayFriendlyCoalition.org. The Coalition staff may contact the Rater to clarify any submittal materials or to discuss particular measures and how the Rater verified those measures. Coalition staff will then send the Rater a confirmation e-mail summarizing the final review. Coalition will send a second e-mail sent to the Project Contact and Rater with the following:

• PDF of the Letter of Qualification
• Bay-Friendly Rated logo
• Bay-Friendly Rated Logo Style Guide.

The Coalition will mail a Bay-Friendly Rated Landscape sign along with a hardcopy of the Letter of Qualification to the Project Contact upon payment of applicable fees.

Client Relations

The Coalition encourages Raters and Clients to treat the verification process as a partnership-building and learning process, rather than just enforcement of program requirements. If possible, the Rater should encourage Clients to participate in the on-site verifications. The Rater is the Client’s ally for quality control. The Advisor can assist in quality control by providing feedback or review of measures prior to the Rater completing the third-party verification. Excellent communication with the Client is the key to successfully balancing dual roles as the Client’s ally for quality control and as an independent, objective Rater. Good communication involves at least three elements:

1. **Project initiation meeting.** See Preparing for the Project, this section.
2. **Construction schedule monitoring.** The Rater should carefully monitor the construction schedule and stay in close communication with project managers to make sure that the Rater reviews, collects key documents, avoids change orders and schedules post-construction site visits without delaying the process. The Rater should do his/her part to ensure that the Client’s decision to rate the project does not result in costly construction delays or change orders.
3. **Timely progress reporting.** The Rater should not wait until project completion to communicate verification results to the Client. Rather, the Rater should keep the Client informed of the verification status throughout the process, particularly if the Rater identifies a deficiency in a measure that the project expected to earn. Whenever possible, the Rater shall give their Client an opportunity to remedy the deficiency before it becomes cost-prohibitive to fix.
V. Submittal Process for Innovation Measures

The Bay-Friendly Rating program provides flexibility to add measures in the form of Innovation points. The Bay-Friendly Rating program maintains a list of Innovation measures at the end of the Scorecard (Scorecard Section H). These measures have been approved in the past and are ready for use by a Rater at any time without requiring permission from The Coalition.

There is also the opportunity to apply for points for practices not found in the rating system being used. There are two types of Innovations and therefore two submittal processes:

Established Innovation Measure: A measure that has been recognized in the past as an Innovation or can be found on another Bay-Friendly scorecard or another green rating system/guideline (e.g., LEED, SITES) AND is not addressed in the Bay-Friendly Landscape Scorecard being used to rate your project

New Innovation Measures: A practice that the Bay-Friendly Rating system has not addressed or that significantly exceeds an existing threshold

The measures within the Bay-Friendly Scorecard have already been vetted by a range of industry stakeholders based upon various considerations as listed below. In deciding whether to apply for Innovation measures, you should determine if the proposed measure achieves all of the following:

- Is the practice currently not addressed in the Bay-Friendly Scorecard?
- Does the practice truly provide a significant additional green landscaping benefit to the consumer and the community?
- Did the project team take significant steps over and above normal landscaping practices or requirements? Practices which are required by State code, local code, or conditions of approval, or are generally implemented within the industry are generally not approved for Innovation points.
- Does the measure have easily verifiable requirements?

Submitting Established Innovation Measures

The following is the Bay-Friendly Rating program’s protocol for submittal for established Innovation points. The process for approval of established measures for Innovation points is streamlined for ease and availability. Raters can expect expedited review and feedback of established measures for Innovation Points. Established measures for Innovation Points include:

- Measures listed under Innovations (Section H) of the Scorecard, such as creating a maintenance task list.
- Expanding an existing measure to a higher level of implementation not recognized on the Scorecard.
- Most existing measures on any Bay-Friendly Scorecard (i.e., Multifamily or Single Family New Home or Single Family Existing Home) that could be considered for use on another Scorecard. Such measures cannot duplicate an existing measure and must be appropriate in intent and application to the specific project.
- Certain measures listed in another rating system such as GreenPoint Rated, LEED, SITES, etc.
• The Rater should submit an initial request via email or telephone call to
discuss the request for the Innovation points to be reviewed by Coalition
staff. The request must:

1. Identify the existing measure, including the specific Rater Manual and measure
number identification.
2. Describe the appropriateness of the application of the measure to the project and
how it is not already captured in the Bay-Friendly Scorecard.
3. Coalition staff will complete an initial review for applicability and respond to the Rater
informally upon receipt of the request and formally after the measure has been evaluated.

**Submitting New Innovation Measures**

The process for approval of New Innovation Measures requires a full proposal and up to six weeks for
review.

The Rater should submit an initial request to Coalition staff via email or telephone call to discuss the
request. Coalition staff will complete an initial review for applicability and respond to the Rater
informally upon receipt of the request and formally after the measure has been evaluated.

If the inquiry passes this initial review, the Rater will be requested to submit a formal proposal in
writing to the Coalition which includes the following:

• A complete description of the measure to match the format within the Rater
manu als, including Intent, Description, Criteria for Qualification, Verification,
Definitions, Code Issues and Additional Resources
• Proposed point assignments by category (Landscape Locally, Landscape for
Less to the Landfill, Nurture the Soil, Conserve Water, Conserve Energy,
Protect Water & Air Quality, Create Wildlife Habitat)
• Supporting rationale for credit and documentation
• Any limitations to applicability (i.e., landscape types, climate)

The formal proposal will be reviewed by the Bay-Friendly Rating Oversight Committee for approval.
The Rater will receive a response within six weeks of submission of the formal proposal. During this
time, the Rater may be called upon to consult on this proposal and development of the measure. Be
sure to consider this time frame in the planning process and be prepared for acceptance as well as
rejection of the measure. If accepted, the Oversight Committee may also consider adding the
measure to the list of existing Innovation measures in Section H of the Scorecard(s).

**Submitting Educational Signage**

For projects attempted to earn Innovation points for educational signage, it is recommended that the
Project Team provide the Rater with signage design as early as possible in the process. The Rater
should submit full-size digital files (pdf or jpg) of the proposed sign(s) to the Coalition for approval.
Appeal Process for Initial Review

If your initial request for Innovation points outlined above is rejected by Coalition staff and the Rater disagrees with the initial review response, they may submit a formal proposal for review by the Oversight Committee following all the requirements outlined above.
VI. Logo Use Guidelines

There are two logos for use:

1. Bay-Friendly Rated Landscape logo (to be revised) for landscapes that have been Rated.
2. Bay-Friendly Rater logo (under development) for qualified Bay-Friendly Landscape Advisors or Raters.

**General Guidelines**

The Coalition is responsible for maintaining, updating and enforcing these guidelines. Owners, developers, municipalities and other program participants using the Rated logos must abide by the following general guidelines:

1. The Bay-Friendly Rated Landscape name and logo may never be used in any manner that would imply program endorsement of a company, its products or its services. Neither the logo nor the program name may be used in any other company name, product name, service name, domain name or website title.

2. Neither logo may not be altered, cut apart, separated or otherwise distorted in perspective or appearance.

3. The logos may never be used in a manner that would disparage the program, the Coalition or its Board or members.

4. The Bay-Friendly Rated logo may never be associated with landscapes that do not meet the Bay-Friendly Rated, third-party standard.

5. The Bay-Friendly Rater logo shall be used to refer to an individual and may never be used in reference to the Rater’s employer, company or colleagues or employees that have not graduated from Bay-Friendly Rater Training.

6. Partners and other authorized organizations are responsible for their own use of the Rated logo as well as use by their agents or representatives, such as advertising agencies and contractors.

7. Design of artwork incorporating the Rated logo must be consistent with the Bay-Friendly Rated logo style guide (under development).

**Guidelines for Bay-Friendly Landscape Rater Logo for Advisors and Raters**

The Bay-Friendly Rater logo is for use only by qualified Bay-Friendly Landscape Advisors and Raters in good standing. Upon successful completion of the course and acceptance of the qualification application, the logo and logo style guide will be made available to the Rater. All uses of the Bay-Friendly Rater logo must be consistent with the Bay-Friendly Rater logo style guide. The Rater logo may never be used in any manner that would imply program endorsement of other non-rating aspects of the Rater or Advisor’s business. For example, a landscape designer who offers Bay-Friendly Landscape Rater services should not claim to offer “Bay-Friendly Rated landscape designs”. Similarly irrigation contractors who are qualified Bay-Friendly Landscape Raters should not offer, “Bay-Friendly Rated irrigation systems”.

Guidelines for Bay-Friendly Rated Landscape Logo for Projects

The Bay-Friendly Rated Landscape logo can be used to advertise completed projects that have been Bay-Friendly Rated. Upon satisfactory completion of the rating process and fee submittals, the Client's project will be eligible to feature the Rated logos in marketing materials, subject to the logo use guidelines and style guide. Advertisements where the Rated logo is associated with successfully Bay-Friendly Rated landscapes do not need approval by the Coalition. Upon submittal and approval of the final rating the Client will receive the Bay-Friendly Rated logo and style guide by email.

Style Guidelines for Use of Bay-Friendly Rated and Rater Logos:

The logos may also be used in print ads, on magnetic truck signs or on business cards. Any use of the logos, outside of its use on websites, must be according to the following style guidelines with written approval from Coalition staff prior to printing and/or public distribution.

When reproducing the logo(s) in ads, business cards, signs or other printed formats, be sure to follow these guidelines for acceptable application:

Please use the electronic or printed version of the logo(s) that have been provided to you upon completing the Bay-Friendly Rater training or successfully submitting for Bay-Friendly Rated status. Do not attempt to re-create the logo. If you or your printer need another format, please contact the Coalition.

The full-color logo(s) is primarily to be used on a white background, however in some instances it can be used on a 10% tint of the primary pms color 617.

When using the logo on a dark background, separate the logo from the background with a white border. Please do not use a photo or graphic as the background.

Please do not change the colors of the logos. Where printing budgets necessitate the use of one color, the logo must appear in black and white, unless given permission from the Coalition.

No structural changes should be made to the logos. Scaling of the logos should be in proportion. Please do not rotate or tilt the logos.

No other graphic elements, such as type, rules, pictures, etc., should infringe upon a buffer space around the logos.

If you’d like to use matching fonts in your ads or business cards etc., the fonts used in the Logos are Copperplate and Dispando.
VII. Quality Assurance / Project Audit

For each Rater, the Coalition will evaluate the greater of one landscape project or ten percent of the Rater’s total BF Rated Landscape projects within a 24-month period. Rated Landscape projects to be checked will be selected at random. The Coalition staff will interview the Rater and review project documentation and rating process organization. The Coalition staff may independently repeat the field verification of a past completed project or another project under construction to check whether verification activities were accurately completed by the Rater, and determine whether information was completely collected and reported as required. A satisfactory landscape rating will be one that meets the following three criteria:

1. Follow-up review finds that documentation practices are well organized and are consistent with verification protocols prescribed in the Bay-Friendly Rating Manual for New Civic, Commercial and Multifamily Landscapes or New Home Landscapes.
2. Follow-up review confirms at least 90 percent of the Bay-Friendly Rated points awarded to the project.
3. Follow-up review confirms the overall project outcome, either pass or fail.

Each set of verification results reviewed will be deemed either satisfactory or unsatisfactory. If the review produces an unsatisfactory outcome, the Coalition will conduct three additional project reviews at the Rater’s expense. No landscape projects that are underway that were verified by the Rater will be awarded a Letter of Qualification until the additional project reviews are complete. Any Rater who produces two unsatisfactory ratings in a two-year period or less will be required to retake the Rater training course and exams in order to maintain good standing in the program. In the event that landscapes need to be re-rated, Coalition staff or a designated representative will perform the rating. The Rater will be responsible for reimbursing the Coalition for the cost of the Rating, regardless of the rating results.

A Rater who disputes any quality assurance outcome or program action taken as a consequence of quality assurance activities may appeal that outcome or action to the Bay-Friendly Rated Landscape Oversight Committee (Committee), according to the following procedures:

1. The Rater submits a written appeal to the Committee. The appeal should describe the quality assurance activities that led to the outcome or action, reasons for disputing the outcome or action, and any alternative outcome or action the Rater recommends.
2. The Rater may request a teleconference or an in-person meeting with the Committee, to be scheduled at a mutually convenient time but not more than one month after the Rater files the appeal. Any request for a teleconference or an in-person meeting with the committee must be included as part of the appeal.
3. The committee may request additional documentation or pose additional questions to the Rater. Any such date requests shall be made to the Rater with one month of the appeal date.
4. The Committee shall maintain written record of in-person meetings and any other communication and correspondence between the Committee and the Rater or other interested parties.
5. The Committee shall complete its deliberations within one month of conducting teleconference or in-person meetings and receiving complete responses to any data requests. The Committee’s decision shall be communicated to the Rater in writing.
6. In the event the Rater disputes the conclusions of the Committee, the Rater may appeal to the Coalition Executive Committee. The Executive Committee will schedule a hearing within two months of the appeal, at which the Executive Committee will review the written record from the Oversight Committee, consider written and oral testimony from the Rater, and issue a decision supporting or denying the appeal.
### VIII. Fee Structure

<table>
<thead>
<tr>
<th>Item</th>
<th>Pricing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Application Fee</td>
<td>$400 per project, due with application</td>
</tr>
<tr>
<td>Project Completion and Recognition Fee</td>
<td>$150 due at time of final submittal, includes one sign, certificate, posting on Coalition website</td>
</tr>
<tr>
<td>Duplicate Letter of Qualification Fee</td>
<td>$25 each</td>
</tr>
<tr>
<td>Additional Bay-Friendly Rated Landscape Sign</td>
<td>$100 each</td>
</tr>
</tbody>
</table>

As of May, 2011

These fees are applicable until updated. For projects completed within two years, the project fees will be held at the level they were at the time of application. For projects of longer duration, the project fees will be updated to reflect the Fee Structure in place at the time of qualification.
IX. Appendix A: Bay-Friendly Rating Materials and Resources

Technical Information:

Bay-Friendly Landscape Guidelines (available in Spanish)
Bay-Friendly Landscaping Guide to Mulch (available in Spanish)
Bay-Friendly Landscaping Guide to Recycled Content and Salvaged Materials
Bay-Friendly Landscaping Guide to Grasscycling
Compost and Mulch Sources in Alameda County
Site Furnishings Fact Sheet

Model Specifications:

Section 329300 – Planting (includes soil and compost specifications)
Section 01505 – Construction and Demolition
Section 015321 – Bay-Friendly Requirements
Model Maintenance Specifications

Plant Lists

Vegetated Swale
Natural Hedges
Lawn Alternatives

Rating Tools

Bay-Friendly Rating Manual for Civic and Commercial Landscapes
Policies and Procedures of the Bay-Friendly Rated Landscape Program
Case Studies of Bay-Friendly Rated Landscapes
Site Analysis Form
Plant List Template
Debris Recovery Plan
Accountability Form
Rater Checklist

Project Application (includes the following):
- Project Intake Form
- Project Data Form
- Water Savings Calculator
- Scorecard
- Innovation Request Form
- Final Project Submittal Form
- Evaluation
Quick Start Guide

4 Steps to Submitting a Bay-Friendly Rated Landscape Project

1. **Prepare for the project**
   - **What to Download**
     - Rating Manual updates
     - Policy & Procedures Handbook updates
     - Scorecards
     - Accountability Form
     - Project Application – includes:
       - Project Intake Form
       - Project Data Form
       - Rater Checklist
       - Innovation Request Form
       - Scorecard
       - Final Submittal Form
       - Evaluation
       - Water Calculator
   - **Tips**
     - Raters can download documents at the Rater/Advisor Tools page at www.BayFriendlyCoalition.org.

2. **Submit the Project Application**
   - **What to Submit**
     - Project Intake Form
     - Project Data Form
     - Planning Scorecard
     - Project Application Fee of $400
   - **Tips**
     - Early in the design phase, not all information may be available. Provide an estimate or state that the information is unknown. The Project Intake Form and data forms will be updated when final documentation for the project is submitted.
     - Submit the application as early as possible in the design phase to allow time for the project team to set goals and have time to incorporate Bay-Friendly practices. Projects that begin with the intention to create Bay-Friendly Landscapes are often able to identify and implement Bay-Friendly practices and avoid costly change orders.

3. **Submit the Final Rating Results**
   - **What to Submit**
     - Final Project Intake Form
     - Final Project Data Form
     - Rater Checklist
     - Bay-Friendly Scorecard
     - Water Savings Calculator
     - Evaluation
     - Accountability Form
     - Project Application Fee of $400
     - Innovation Request Form (if necessary)
     - Signage Review Approval Form (if necessary)
   - **Tips**
     - Check the Project Intake Form to ensure that the contact information is accurate before submitting the Final Rating Results. The Project Contact and Logo will be included on the Bay-Friendly Landscape Materials. The Project Contact will be mailed a Letter of Qualification and Bay-Friendly Rated Sign.
     - Retain documentation for each practice on file for five years after the date of final certification and make them available to the Bay-Friendly Coalition when a quality assurance audit is conducted for the project. Documentation should be organized and easy to access.
     - Submit all signage that describes Bay-Friendly practices/principles or uses the Bay-Friendly logo online for approval. The Bay-Friendly Coalition maintains an online database of Bay-Friendly tangible materials. The Coalition will be notified via email and receive comments to assist in the verification process.

4. **Verify and Gather Documentation**
   - **What to Submit**
     - Construction Drawings
     - Specifications
     - Photos, field notes, spreadsheets, calculations, etc.
     - Receipts, technical data sheets, product cut sheets, installation instructions, shop drawings, etc.
     - BF Landscape Maintenance Task List and Maintenance Manual
     - Innovation Request Form (if necessary)
     - Signage Review Approval Form (if necessary)
   - **Tips**
     - Follow the Step 1 instructions to verify the implementation of the Bay-Friendly Landscape score.
     - Throughout the project, the Rater will compile various types of project information to verify the implementation of key Bay-Friendly principles and pass or fail each practice that comprises the Bay-Friendly landscape score.
     - Contact the Bay-Friendly Coalition via email or telephone to discuss proposed Innovations. Innovations can be submitted for review before the final rating results are submitted. Contact information will be provided to the Bay-Friendly Coalition when a quality assurance audit is conducted.

Bay-Friendly Landscaping
& Gardening Coalition
2140 Shattuck Ave. #2100
Berkeley, CA 94704
info@bayfriendlycoalition.org
www.bayfriendlycoalition.org
## Appendix C: Bay-Friendly Scorecard Practices Most Frequently Implemented

<table>
<thead>
<tr>
<th>% of Projects Achieving Point</th>
<th>Practice Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>100%</td>
<td>C.6.a Required: Planting specifications and plans indicate that after construction, all soil on site is protected with a minimum of 3 inches of mulch</td>
</tr>
<tr>
<td>100%</td>
<td>C.7.a.i Required: 3.5% by dry weight OR 1 inch of quality compost OR</td>
</tr>
<tr>
<td>100%</td>
<td>D.2.a Required: Divert 50% of landscape construction and demolition waste.</td>
</tr>
<tr>
<td>100%</td>
<td>E.1.a Required: No species will require shearing</td>
</tr>
<tr>
<td>100%</td>
<td>E.2.a Required: None of the species listed by Cal-IPC as invasive in the San Francisco Bay Area are included in the planting plan</td>
</tr>
<tr>
<td>100%</td>
<td>E.3.a.i Required: 75% of all non-turf plants</td>
</tr>
<tr>
<td>100%</td>
<td>E.4.b.i Required: A maximum of 25%, with sports or multiple use fields exempted.</td>
</tr>
<tr>
<td>100%</td>
<td>F.2.a REQUIRED: Specify weather-based (automatic, self adjusting) irrigation controller(s) that includes a moisture and/or rain sensor shutoff</td>
</tr>
<tr>
<td>100%</td>
<td>F.2.a. Required: Sprinkler and spray heads are not specified for areas less than 8 feet wide</td>
</tr>
<tr>
<td>100%</td>
<td>E.4.a Turf is not specified in areas less than 8 feet wide or in medians, unless irrigated with subsurface or low volume irrigation</td>
</tr>
<tr>
<td>95%</td>
<td>C.7.a.iii Specify the use of compost from processors that participate in the US Composting Council's Standard Testing Assurance program</td>
</tr>
<tr>
<td>95%</td>
<td>E.4.b Turf shall not be installed on slopes exceeding 10%</td>
</tr>
<tr>
<td>89%</td>
<td>C.1.a. Submit laboratory soil analysis results and recommendations for compost and natural fertilizers (total 3 points)</td>
</tr>
<tr>
<td>89%</td>
<td>C.4.a Design documents include specification to alleviate compacted soils to a depth of at least 8 inches, before planting, for all landscaped areas that can not be protected during construction</td>
</tr>
<tr>
<td>89%</td>
<td>D.7.a Design documents include construction specifications that require integrated pest management</td>
</tr>
<tr>
<td>89%</td>
<td>E.1.b Plants specified can grow to mature size within space allotted them</td>
</tr>
<tr>
<td>89%</td>
<td>E.4.b.ii A maximum of 15%, with sports or multiple use fields exempted</td>
</tr>
<tr>
<td>89%</td>
<td>E.5.a. Group plants by water requirements and sun exposure and select plant species that are appropriate for the water use within each zone and identify hydrozones on the irrigation plan (with separate irrigation valves for differing water needs, if irrigation is required)</td>
</tr>
<tr>
<td>84%</td>
<td>A.1.b. The site is located within an urban growth boundary and avoids environmentally sensitive sites</td>
</tr>
<tr>
<td>84%</td>
<td>C.5.b Fertilizers or soil amendment materials prohibited by Organic Materials Research Institute (OMRI) in its generic materials list are not allowed in the construction of the project</td>
</tr>
</tbody>
</table>

Total number of projects surveyed: 19.
Appendix D: Bay-Friendly Rated Landscape Submittal List

Application
- Information on the Project Application and Data Form should be as complete as possible. Do not leave spaces blank. If information is not yet available (e.g., landscape contractor contact info, planting area takeoffs), the Rater should indicate so in the space provided.
  - Project Application
  - Project Data Form
  - Planning Scorecard (showing project goals)
  - Project Application Fee $400

Submit Innovation Credits
This process has two steps:
- E-mail or phone the Coalition for an initial assessment of your proposed Innovation.
- Submit Innovation Request Form.

Submit Signage for Review
- Signage Review Approval Form
- Full-size PDF of proposed signage

Submit Bay-Friendly Rating Results
- Final Project Submittal Form
- Updated Project Application
- Updated Project Data Form
  1. Final Bay-Friendly Scorecard
  2. Water Savings Calculator
  3. Evaluation
  4. Accountability Form
  5. Project Photos
- Fees:
  1. Project Completion and Recognition Fee $150 (includes one certificate and one BF rated landscape sign)
  2. Additional Letter of Completion Fee $25 each
  3. Additional Rated Signage Fee $100 each
Types of Documentation
In addition to the downloaded and completed documents (see above), additional documentation may include:

- Landscape Plans
- Photos, field notes, spreadsheets, and calculations of site verified practices
- Receipts, MSDS, cut sheets, installation instructions, etc.
- BF Landscape Maintenance Task List and Maintenance Manual

Submittal Contact Information
Bay-Friendly Coalition
Rated Landscape Program
2140 Shattuck Ave., #2100
Berkeley, CA 94704
Email info@bayfriendlycoalition.org
www.bayfriendlycoalition.org