Acknowledgement

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Table of Contents

Acknowledgement ........................................................................................................... 2

I. Introduction to Bay-Friendly Rated Landscapes ................................................................. 1

II. Types of Rated Landscapes ............................................................................................ 2

   A. Third-Party Rated ..................................................................................................... 2
   B. In-House Rating ...................................................................................................... 2

III. Roles, Responsibilities and Requirements .................................................................. 3

   A. Eligibility Requirements ......................................................................................... 3
   B. The Rater’s Role ...................................................................................................... 3
   C. ReScape California’s Role ....................................................................................... 4
   D. Rater Requalification Requirements ...................................................................... 4

IV. Rater Code of Conduct ................................................................................................. 6

   A. Judicial Procedures ................................................................................................. 7

V. The Rating Process ........................................................................................................ 9

   A. Prepare for the Project ............................................................................................ 9
   B. Project Application – Initial Submittal .................................................................... 10
   C. Verify and Gather Documentation ......................................................................... 11
   D. Project Application – Final Submittal .................................................................... 12
   E. Client Relations ...................................................................................................... 13

VI. Submittal Process for Innovation Measures ............................................................... 13

   A. Submitting Established Innovation Measures ...................................................... 14
   B. Submitting New Innovation Measures .................................................................. 14
   C. Submitting Educational Signage .......................................................................... 15
   D. Appeal Process for Initial Review ......................................................................... 15

VII. Logo Use Guidelines ................................................................................................ 16

   A. General Use Guidelines ........................................................................................ 16
   B. Use Guidelines for Bay-Friendly Rater Seal Logo ............................................... 17
   C. Use Guidelines for Bay-Friendly Rated Landscape Logo for Projects ................... 17

VIII. Logo Style Guidelines .............................................................................................. 17
IX. Desk Review and Quality Control .......................................................................................................................................................... 18
   A. Desk Review Procedures ........................................................................................................................................................................ 18
   B. Quality Control ..................................................................................................................................................................................... 19
   C. Appeals to Rating Results or Program Actions ................................................................................................................................. 19
X. Appendix A: Bay-Friendly Rating Materials and Resources ........................................................................................................... 21
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 credible rating program 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 owners and occupants, the community, and the environment.

Bay-Friendly Rated Landscape projects are designed and built looking through the environmental lens of the seven Bay-Friendly principles. These principles emphasize 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 Rated Scorecard for Civic, Commercial and Multifamily Landscapes, implementing fourteen required practices and earning a minimum of 60 points. In addition, all of the implemented Bay-Friendly practices must be verified by a 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 ReScape California, a nonprofit 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 Program was originally piloted through StopWaste 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 Bay-Friendly Rated Scorecard for Civic, Commercial and Multifamily Landscapes. ReScape California 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 stormwater, and providing healthy habitat for pollinators, birds, native plants, beneficial insects, and people.
- Facilitate compliance with 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 on stormwater).
- 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, and pesticide consumption, generate less waste, and require fewer and shorter visits by maintenance staff.
This handbook provides the information you need as a Bay-Friendly Rater to understand the rating process, your rights, and your responsibilities. The distinct policies for the Bay Friendly Rated Scorecard for Civic, Commercial and Multifamily Landscapes are addressed in the appropriate sections (e.g., Rating Process).

As a Bay-Friendly Rater, 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 of the Bay-Friendly Rated Scorecard.
- ReScape California relies on your results to provide credibility and quality to the Bay-Friendly Rated brand.

II. Types of Rated Landscapes

Landscapes may be either Third-Party Rated or In-House Rated. Each type holds equal status as a Rated Landscape, however; they have differing submittal requirements and review procedures.

A. Third-Party Rated

A Third-Party Rated landscape has been rated by a Rater who is not part of the design team and has been contracted as an independent party to rate the landscape. The Third-Party Rating allows for a “second set of eyes” on the project. All Third-Party Raters who are submitting a final project application for the Version 4 Landscape Scorecard for the first time will require a Desk Review. Once a Third-Party Rater has shown proficiency with the rating process, the fees will be reduced and the Desk Review will not be required. See Bay-Friendly Rated Landscape Fee Schedule at www.ReScapeCA.org.

B. In-House Rating

A project may be In-House Rated if a member of the design team has completed the Rater Training and is a Bay-Friendly Rater in good standing. In this case, a Landscape Architect or Designer may include Bay-Friendly Rating as part of the scope of design work. This has the potential to streamline the process, since the designer is also responsible for documenting and verifying Bay-Friendly Practices. Since In-House-Rating is less objective, a Desk Review is required for every project. See Bay-Friendly Rated Fee Schedule at www.ReScapeCA.org
III. Roles, Responsibilities and Requirements

A. Eligibility Requirements

To become a Bay-Friendly Rater for civic, commercial and multifamily landscapes, you must:

1. Complete the Bay-Friendly Rater Training for Civic, Commercial and Multifamily Landscapes by attending all classes and passing a final exam.

2. Hold current and in good standing Qualification as a Bay-Friendly Landscape Professional.

3. Submit documentation of one or more of the following current licenses, degrees, certifications or experience:
   a. Landscape architecture, engineering or architecture degree or certification
   b. Landscape contractor license
   c. Build It Green’s GreenPoint Rater
   d. Public agency experience in planning, design, construction or management of landscapes
   e. Others subject to approval

4. Submit a written statement confirming you have at least two years of experience preparing or reviewing landscape construction documents or two years of experience with contract administration (CA) or construction observation (CO).

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

B. The Rater’s Role

The Rater works with landscape architects/designers, contractors, lenders, public agencies, owners, and ReScape California in a collaborative fashion to maximize the sustainable features and compile supporting documentation. The Rater will submit verification results to ReScape California to demonstrate project eligibility for Bay-Friendly Rated Qualification. The Rater also must keep hard copy documentation of verification results on file for two years and make the documentation available to ReScape California upon request.

There are two types of rated projects and the roles of the Rater vary depending on the type of project.

Third-Party Rating

With a Third-Party Rating the Rater must be separate from the design team. The Rater may provide recommendations, advice and technical assistance but does not design, recommend products or manufacturers, or write specifications for a project for which he/she acts as the Rater. Review procedures for Third-Party Rating are described in Section IX – Desk Review and Quality Control.

In-House Rating

With an In-House Rating the Rater may have dual roles as part of the design team as the project landscape architect, designer or project manager. The Rater may design the project, provide design assistance and write project specifications. In-House Rating will require additional ReScape California
fees and quality control oversight in the form of a Desk Review described in Section IX – Desk Review and Quality Control.

ReScape California has created several documents to assist in the submittal process. These documents are located at www.ReScapeCA.org

- Appendix A: Definition of Resources for Raters provides definitions of various documents and tools developed by ReScape California.
- Quick Start Guide is a one-page flyer summarizing the process for submitting a project.
- Bay-Friendly Rating Process (Flow Chart)

C. ReScape California’s Role

ReScape California will provide the following administrative and technical support services:

- Maintain a list of Qualified Bay-Friendly Raters on its website
- Provide training and orientation for Raters, landscape professionals, builders, contractors, local government staff, and other interested parties
- Provide technical support to Raters
- Maintain forms, templates, guidebooks, manuals, tools 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, real estate agents, and other stakeholders as well as key metrics on the benefits of the program
- Facilitate coordination and information exchange between various stakeholders
- Review Rater final application submittals and supporting documentation as necessary
- Conduct Desk Reviews of landscape projects for Third-Party Raters new to Version 4 of the Bay-Friendly Landscape Scorecard and for all In-House Raters’ landscape projects and as needed to maintain consistent quality across the Bay-Friendly Rating System
- Approve requests for Innovations and Signage
- Issue Bay-Friendly Rated Letters of Qualification to the Rater, client and any other designated recipients

D. Rater Requalification Requirements

Qualification as a Bay-Friendly Rater will remain valid provided the Rater maintains an active Bay-Friendly Design or Maintenance Qualification and rate (or be in the process of rating) at least one project within every two years. If a Rater’s Bay-Friendly Design or Maintenance Qualification lapses, their Rater Qualification is no longer valid until the Rater renews their Qualification.

Raters must renew their Qualification(s) every two years by meeting Continuing Education Unit (CEU) requirements and paying a Requalification Fee. By completing this process and renewing their Design and/or Maintenance Bay-Friendly Qualification, Raters will also extend their good standing as a Bay-Friendly Rater.
1. Raters must fulfill all of the requirements listed below to renew their Qualification. Raters must pay all associated Requalification Fees. Visit www.ReScapeCA.org to view the Requalification Fee structure.

2. Raters must report CEUs to Requal@ReScapeCA.org in the following format:
   
   Event Name
   Event Date
   Host Organization
   Number of Hours Attended

   Bay-Friendly Qualification renewal requires self-reporting of four CEUs every two years. One hour of professional-level training in a sustainable landscape-related course is equivalent to one CEU. ReScape California recognizes CEUs from a wide range of sources, and preapproval of CEUs is not required.

3. Raters must provide the name of rated project(s) (completed or in process within the last two years) as listed in the project application. Raters can email their project name along with their CEUs to Requal@ReScapeCA.org

Once you have completed all three steps, ReScape California will verify your CEUs and project(s) and Raters will receive confirmation about their renewed Qualification.
IV. Rater Code of Conduct

For many owners, designers, developers, builders, contractors, and public agencies, the Bay-Friendly Rater 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 Raters 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 ReScape California, 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 ReScape California through specific procedures listed in the Judicial Procedures section below. This Code of Conduct is applicable to all qualified Raters.

1. Third-Party 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 GreenPoint 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.
   • 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. Third-Party and In-House Raters shall:
   • Act in good faith toward each client.
   • Perform services and express opinions based on honest conviction and only within their areas of education, training, or experience.
   • Be objective in reporting and not knowingly understate or overstate the significance of reported findings.
• Not disclose to third parties other than ReScape California 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.

• Not disclose rating results to anyone other than ReScape California and the client or the client’s agent without the approval of the client.

• Avoid activities that harm the public, discredit themselves, or reduce public confidence in the profession and the Bay-Friendly Landscaping Program.

• 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.

• Not advertise, market, or promote services or qualifications in a fraudulent, false, deceptive, exaggerated or misleading manner.

• Abide by ReScape California bylaws and guidelines in the use of the program logo and other Bay-Friendly Landscaping materials.

• Respond professionally to client or ReScape California concerns and complaints about a rating.

• Report substantial and willful violations of this Code to ReScape California.

• Not 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.

• Not 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.

• Not 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.

A. Judicial Procedures

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

ReScape California’s Bay-Friendly Rated Landscape Oversight Committee (“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 misconduct.

• 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, ReScape California 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, ReScape California staff or representative(s) will perform the rating. The Rater will be responsible for reimbursing ReScape California for the cost of the rating, regardless of the rating results.
V. 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 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 fourteen required measures and attaining a total score of 60 points out of a total of 225 points. See the Rating Manual and Scorecard to learn more about the specific requirements of the rating system.

A. 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 Bay-Friendly Rated Project Fee.
   - The Bay-Friendly Rated Landscape fee structure can be found at [www.ReScapeCA.org](http://www.ReScapeCA.org).
   - The Rater should be sure to account for processing and payment received when submitting final rating results.

2. **Initial Meeting with Client.** The Rater (Third-Party or In-House) should 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 Bay-Friendly Rated Scorecard for Civic, Commercial and Multifamily Landscapes.

   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 five 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.

In preparation for the first meeting with the client, the Rater should always download the latest version of key documents from the ReScape California website at www.ReScapeCA.org.

B. 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 ReScape California for an initial review. All documentation must be completed properly in order for ReScape California staff to review the project. If information is not yet determined, incomplete or unavailable, please provide an estimate in the application. Please note the project team is to provide the Rater with the information to fill out the following forms. The project team may fill out the information directly into the forms or provide it to the Rater for them to enter. The Scorecard shall be filled out with goals agreed upon at the initial meeting. All required credits shall be selected and the Scorecard must reflect a goal of achieving at least 60 points. For the initial submittal, the completed application consists of the following documents:

1. Project Intake Form

- Project name, address, schedule, square footage information
- Project contact information
- Note: Project team provides Rater with this 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 provides Rater with this information
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 is available. However, it is not uncommon to not yet have hydrozone information. Note that this water budget calculator is a valuable tool for Water Efficient Landscape Ordinance budgeting submittals for civic permit processes. Note: project team provides Rater with this information.

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

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

### C. 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 recommended that the following technical assistance be provided:
   
   a. **Initial Plan Review.** It is recommended that an initial plan review occur during the design phase. Also, 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.
   
   b. **Second Plan Review.** It is recommended that a second plan review occur before 100% CD so that corrections can be made before the bid process.
   
   c. **Preconstruction Meeting.** It is recommended that a preconstruction meeting with the design team and contractors be held to review goals to ensure compliance.
   
   d. **Submittal Reviews.** It is recommended that the Rater review key contractor submittals such as mulch and compost suppliers to ensure compliance.

2. **Innovation and Signage Submittal** It is recommended that innovation and signage be submitted for review by ReScape California early in the design process. See Section VI – Innovation Measures 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 Innovation points and measures that need ReScape California approval should be submitted before the final rating submission. Follow Innovation submittal protocols described in Section VI – Innovation Measures.

3. **Rate Project.** The verification methodologies consist of three parts: **Bid Document Review, Visual Verification** and **Accountability Form and Other Documentation.** Some combination of the methodologies is usually required for compliance. See the Bay-Friendly Rating Manual for Civic, Commercial & Multifamily Landscapes for more information on each type of verification.

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 mark the status as complete, to do or not applicable on the Rater Checklist. The
score will then automatically be calculated within the Bay-Friendly Scorecard tab. When all of the verification methods have been completed for each credit, the achieved score will reflect the points the project has earned.

Visual verification overrides bid document review. A rater may add or remove credits based on what they find on-site. Bid documents override accountability forms unless other backup is provided. Raters should be aware that if a condition is noted during the final site visit that is not consistent with Scorecard requirements, they should alert the project owner and ensure the condition is rectified. This is the case regardless of whether the practice in question requires visual verification per the Rater Manual.

Raters must retain documentation of verification results for each credit on file for two years after the date of final qualification, and must make such files available to ReScape California upon request. Documentation should be kept organized and readily accessible for Desk Review. See Section IX – Desk Review and Quality Control for further information.

D. Project Application – Final Submittal

After compiling documentation and completing the Bay-Friendly Rated Scorecard, the Rater will electronically submit final results to ReScape California. The Rater should make sure to provide the client with a copy of the project’s final results.

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

A completed final submittal consists of the following documents:

- Project Application:
  - Project Intake Form
  - Project Data Form
  - Water Calculator
  - Bay-Friendly Rated Scorecard
  - Rater Checklist
  - Innovation Request Form (if applicable)
  - Final Submittal Form
  - Evaluation

- One to two project photos (optional, used for promotional opportunity)

Additional fees as applicable for additional signage. The Rater must submit the final project application to info@ReScapeCA.org for all In-House or Third-Party Ratings. ReScape California staff will send an email including a memo to the Rater approving the final submittal or asking the Rater to revise and resubmit the project application. Once ReScape California staff have approved the final submittal and received the final application fee, they will contact the Rater to schedule the Desk Review, if appropriate. See Section IX – Desk Review and Quality Control for more information. Once the final project application is approved and Desk Review is successfully completed, if needed, ReScape will send an e-mail to the project contact listed on the Project Intake Form and the Rater with the following:
ReScape California will mail a Bay-Friendly Rated Landscape sign along with a hard copy of the Letter of Qualification to the project contact.

E. Client Relations

ReScape California 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. 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. **Initial meeting with client.** 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 and collect 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.

VI. **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 www.ReScapeCA.org. These measures have been approved in the past and are ready for use by a Rater at any time without requiring permission from ReScape California.

There is also the opportunity to apply for points for practices not found in the Bay-Friendly Rating system. 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 Rated Scorecard or another green rating system/guideline (e.g., LEED, SITES) AND is not addressed in the Bay-Friendly Rated Scorecard.

- **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?

A. 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.
- 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 ReScape California staff. The request must:
  1. Identify the established innovation measure.
  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. ReScape California 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.

B. 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 ReScape California staff via email or telephone call to discuss the request. ReScape California 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 ReScape California which includes the following:

- A complete description of the measure to match the format within the Rating Manual, 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 Raters Council 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 Bay-Friendly Raters Council may also consider adding the measure to the list of existing Innovation measures in Section H of the Scorecard.

C. Submitting Educational Signage

For projects attempting 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 ReScape California for approval.

Please note: any project that wishes to use the Bay-Friendly logo or name shall submit proposed signs to ReScape California for approval prior to fabrication.

D. Appeal Process for Initial Review

If your initial request for Innovation points outlined above is rejected by ReScape California 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.
VII. Logo Use Guidelines

Bay-Friendly Rated Landscape Logo

The Bay-Friendly Rated Landscape logo is designated for landscape projects that are in the process of attaining or have successfully achieved a Bay-Friendly Rating.

Bay-Friendly Rater Seal Logo

The Bay-Friendly Rater Seal Logo is associated with the Bay-Friendly Rater. The Rater may use this seal in accordance with the Use and Style Guidelines to represent their status as a Rater.

A. General Use Guidelines

ReScape California 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. ReScape California must approve any permanent signs using any of the Bay-Friendly logos or name for consistency with Bay-Friendly messaging.

3. Neither logo may be altered, cut apart, separated or otherwise distorted in perspective or appearance.

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

5. The Bay-Friendly Rated Landscape logo may never be associated with landscapes that have not been officially recognized as a Bay-Friendly Rated Landscape or with landscapes that are not in the process of getting a Bay-Friendly Rating.

6. 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 the Bay-Friendly Rater Training.

7. 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.
8. Design of artwork incorporating the Rated logo must be consistent with the Bay-Friendly Rated Logo Style Guidelines (Section VIII).

B. Use Guidelines for Bay-Friendly Rater Seal Logo

The Bay-Friendly Rater Seal logo is for use only by qualified Bay-Friendly Landscape 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 Seal logo must be consistent with the Bay-Friendly Rater logo style guide. The Rater Seal logo may never be used in any manner that would imply program endorsement of other non-rating aspects of the Rater’s own 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.”

C. Use 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, the client’s project will be eligible to feature the Rated logo in marketing materials. Advertisements where the Rated logo is associated with Bay-Friendly Rated Landscapes do not need approval by ReScape California. Upon submittal and approval of the final rating the client will receive the Bay-Friendly Rated Landscape logo by email.

VIII. Logo Style Guidelines

When reproducing the logos in ads, business cards, signs or other printed formats, be sure to follow these guidelines. Any use of the logos, outside of their use on websites, must be according to the following style guidelines with written approval from ReScape California staff prior to printing and/or public distribution.

1. 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, contact ReScape California at info@RescapeCA.org.

2. The full-color logo 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.

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

4. 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 ReScape California.

5. No structural changes should be made to the logos. Scaling of the logos should be in proportion. Do not rotate or tilt the logos.
6. No other graphic elements, such as type, rules, pictures, etc., should infringe upon a buffer space around the logos.

7. 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.

IX. Desk Review and Quality Control

Practices included in the Bay-Friendly Scorecard can be complex, situation-specific, and may evolve with changing technologies and best practices. ReScape California seeks to ensure the integrity of the Rating program. The Bay-Friendly Rater Council is available to provide technical assistance to Raters. In addition, review procedures are in place to review documentation so that practices needing further explanation, clarification or Scorecard adjustment may be identified.

A. Desk Review Procedures

After the final project application is submitted to ReScape California by the Rater and approved by ReScape, the Desk Review occurs. The Rater should contact ReScape California to request an appointment for an in-person Desk Review. This procedure replaces the audit process in earlier versions of the Bay-Friendly Landscape Scorecard and insures that Raters are learning the new credits and requirements in the Version 4 Scorecard which includes 5 additional required practices, 24 new credits and numerous edits of existing credits.

What to Bring to a Desk Review?

A rater should bring all forms of verification for every credit the project has earned to the Desk Review. This includes; bid documents, photos from visual verification, accountability forms and other documentation such as receipts or exhibits. Digital copies are preferred; however, a rater may bring hard copies of verification. Rater’s should bring all digital materials on a laptop. All materials should be in the folders labeled – Bid Documents, Final Project Application, Accountability Forms, and Verification Documents. Verification documents should include all other forms of verification including site photos, calculations, receipts etc. and should be clearly labeled by the Credit number that they are meeting. It is recommended that plan and specification language that earn points on the Bay-Friendly Landscape Scorecard are highlighted or tagged in a way to easily reference them in the Review. Including notes such as relevant sheet numbers in the Scorecard or Rater Checklist for each credit as to where in the bid set plans they found the information may also be useful during a Desk Review. ReScape California reserves the right to request copies of all relevant materials.

What to Expect During the Desk Review?

A ReScape California representative will review all 14 of the required practices on the Bay-Friendly Landscape Scorecard and the verification documents for each of them. All or a sample of practices earning credits will also be reviewed depending on the complexity and size of the project and the quality of the Rater’s documentation. The Desk Review will take approximately 2 hours. If a credit that is claimed on the Scorecard does not have any verification materials, the ReScape California reviewer will want to see verification for more credits. In addition, the Rater will be asked to submit any missing documentation. ReScape California has the authority to deny any credits and adjust the project score. All unconfirmed points will be removed from the project score. This is also an opportunity for ReScape California to provide feedback and training to Raters.
What is a Successful Desk Review?

A successful Desk Review will be one that has submitted a complete final project application, paid appropriate project fees, and has shown clear verification as described in the Rating Manual for each required practice and credit earning points on the Scorecard. The verification for each credit is clear, well labeled and easily accessed. A Rater has shown proficiency if at least 80 percent of the Bay-Friendly Rated points reviewed are confirmed and all required practices are confirmed. If during the review the submitted work is deemed very unsatisfactory, ReScape California reserves the right to revoke a Rater’s credentials. A project will not receive the Bay-Friendly Rating if it has not met the minimum requirements. ReScape California has the authority to remove a Rater’s credentials if a Rater continually fails to perform the duties outlined in the Rating Manual, is consistently unable to verify implementation of practices in the Scorecard or shows a poor understanding of design and construction documents and process.

Third-Party Rated Desk Review Procedures

All projects submitted for final Bay-Friendly Rating by Third-Party Raters will require a Desk Review. Once a Third-Party Rater has shown proficiency with the Rating process the fees will be dropped and the Desk Review will not be required. A Third-Party Rater should show proficiency within one to three Desk Reviews.

A Third-Party rater has shown proficiency if at least 80 percent of the Bay-Friendly Rated points are confirmed. If the project reviewed is deemed unsatisfactory, the Rater must continue to receive a Desk Review until proficiency is shown. If during a review the submitted work is deemed very unsatisfactory ReScape California reserves the right to revoke a Rater’s credentials.

In-House Rated Desk Review Procedures

Since In-House-Rating is less objective, a Desk Review is required for every project. If during a review the submitted work is deemed very unsatisfactory, ReScape California reserves the right to revoke a Rater’s credentials.

B. Quality Control

To protect the integrity of the Rating system, the Bay-Friendly Rated Landscapes program administrator retains the right to conduct quality assurance audits of projects that have earned the Bay-Friendly Rated Landscape designation.

All Raters must retain documentation of verification results for each credit on file for two years after the date of final rating, and must make such files available to ReScape California if more information is requested. Documentation should be kept organized and readily accessible. This information may also be requested by ReScape California as needed for case studies, website postings, promotional purposes, or as examples for other Raters and trainings, etc.

C. Appeals to Rating Results or Program Actions

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 data 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 ReScape California 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.
X. **Appendix A: Bay-Friendly Rating Materials and Resources**

**Bay-Friendly Rated Landscapes Resources**

- Bay-Friendly Rating Manual for New Civic, Commercial and Multifamily Landscapes
- Bay-Friendly Rated Scorecard for New Civic, Commercial and Multifamily Landscapes
- Bay-Friendly Rated Landscape Program Policies and Procedures Handbook
- Bay-Friendly Rated Version 4.0 Summary of Changes
- Bay-Friendly Rated Landscape FAQs for Project Teams and Property Owners (Webpage)
- Bay-Friendly Rated Landscape Quick Start Guide
- Bay-Friendly Rated Landscape Process Diagram
- Bay-Friendly Rated Landscape Project Application
- Bay-Friendly Rated Landscape Accountability Form
- Bay-Friendly Rated Landscape Educational Signage Instructions
- Bay-Friendly Rated Landscape Signage Artwork
- Bay-Friendly Rated Landscape Success Stories (Webpage)
- Bay-Friendly Rated Pre-Approved Innovations (Webpage)

**General Bay-Friendly Landscape Resources**

- Bay-Friendly Landscape Guidelines: Sustainable Practices for the Landscape Professional (also available in Spanish)
- Bay-Friendly Gardening Guide: From Your Backyard to the Bay
- Hiring a Bay-Friendly Qualified Professional to Design or Manage Your Landscape
- A Bay-Friendly Guide to Mulch (also in Spanish) and A Case Study: Mulch
- A Bay-Friendly Landscaping Guide to Grasscycling (also in Spanish) and A Case Study: Grasscycling
- A Bay-Friendly Landscaping Guide to Recycled Content and Salvaged Materials
- Bay-Friendly Plant Lists: Natural Hedges, Lawn Alternatives and Groundcovers, Vegetated Swale
- Bay-Friendly Site Analysis
- Bay-Friendly Soil Management Plan
- Bay-Friendly Plant Legend Template and Example of Filled-In Plant Template
- Sheet Mulch Directory (Webpage) www.lawntogarden.org
- Builders Guide to Reuse and Recycling (Alameda County)

**Bay-Friendly Model Specifications and Model RPF Language**

- Bay-Friendly Rated Landscape Specification 013521
• Bay-Friendly Construction Waste Management and Disposal 017419
• Bay-Friendly Debris Recovery Plan
• Bay-Friendly Planting Specification 329300
• Bay-Friendly Maintenance Manual
• RFP Language for Hiring a Landscape Designer
• RFP Language for Hiring a Bay-Friendly Rater (two versions)
• Alameda County Model Water Efficient Landscape Ordinance