SAN FRANCISCO UNIFIED SCHOOL DISTRICT
2006 PROPOSITION A BOND GREEN SCHOOLYARD PROGRAM

REQUEST FOR QUALIFICATIONS (RFQ)
FOR LANDSCAPE ARCHITECTURAL DESIGN SERVICES
FOR
ALICE FONG YU ELEMENTARY GREEN SCHOOLYARD PROGRAM
1541 12TH Avenue
San Francisco, CA 94122

August 26, 2011
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I. INTRODUCTION TO REQUEST FOR QUALIFICATIONS (RFQ) SUBMITTAL PROCESS

The San Francisco Unified School District’s (SFUSD) 2006 Proposition A Bond Green Schoolyard Program and the Alice Fong Yu ES Green Schoolyard Committee are seeking Statements of Qualifications (SOQ) from qualified landscape architecture firms or teams to provide landscape architectural design and construction administration services. Teams are joint ventures that must be assembled prior to submitting a SOQ.

The provisions of the Public Contract Code Sections 10115 et Seq as defined in the State Allocation Board regulation 1862.12.5(g) for implementation of Disabled Veteran Business Enterprise Goals shall apply to projects of $75,000 and above. SFUSD requires submitters to engage in positive efforts to use DVBE sub-consultants and allow these sub-consultants the maximum feasible opportunity to compete for sub-contracts for the proposal. SFUSD requests Prime respondents to engage in good faith efforts to provide DVBEs with 3% of the contract for subcontracting opportunities.

Four (4) bound copies and one (1) digital PDF copy (on CD or DVD) of the response to this RFQ should be submitted in 8-1/2” x 11” format with any supporting material or documentation in a sealed envelope and delivered or mailed to:

Lori Shelton, Project Manager  
San Francisco Unified School District  
2006 Proposition A Bond Green Schoolyard Program  
135 Van Ness Avenue, Room 216  
San Francisco, CA 94102

RE: Alice Fong Yu ES Green Schoolyard Project

All participating landscape architectural firms must have an existing primary working business location within a 25-mile driving radius of the city limits of San Francisco, CA.

Applicants shall submit SOQs by 2:00 PM on Monday, September 19, 2011.

Late submittals will not be considered.

1. Methodology of Contracting for Landscape Architectural Design Services and Basis of Fees

The District will provide a broad range of project management services including the oversight and management of the selected Landscape Architectural firms. The Landscape Architecture firms selected will be the Landscape Architects of Record for the Alice Fong Yu ES Green Schoolyard Project and will work directly with the Alice Fong Yu ES Green Schoolyard Committee and SFUSD staff to develop a design that meets the needs of the school community and the school district.

2. Administrative Requirements
The selected Landscape Architect will be required to complete and submit the SFUSD Professional Consulting Services agreement, SFUSD Criminal Background Certification form and 2011 IRS W-9 form. The Professional Consulting Services agreement will be issued by the District’s Contracts Administrator after Board of Education approval has been obtained. The consultant’s fee and scope of work shall be outlined in the agreement. Compensation shall be on the basis of the approved lump sum agreement. A sample SFUSD contract is included in Attachment B.

Landscape architectural firms or each member of associations for joint ventures awarded a contract will be required to maintain, in full force and effect at their own expense, the following insurance policies with companies certified with the California Insurance Commission. Please include the name of your insurance provider in your SOQ. The following insurance policies are required in order for your firm/joint venture group to qualify for participation in this project:

- Worker’s Compensation Insurance in compliance with CA law
- General Liability Insurance ($1 million / per occurrence)
- Automobile Insurance ($1 million / per occurrence)
- Professional Liability (E & O) Insurance with limits not less than $1 million / per claim, annual aggregate.

If any policy is written on a Claims Made Form, the consultant must provide a project specific policy to continue the coverage for five (5) years beyond the date of the individual project completion.

With each contract each firm must provide the District with original “wet signature” certificate(s) of insurance that include the following:

A. The San Francisco Unified School District, its Board, Officers and employees shall be named as additional insured parties on General Liability and Automobile policies. Endorsements must be submitted with the certificate(s);
B. Should any of the above described policies be canceled before the expiration date thereof, the issuing company will provide written notice to the certificate holder a minimum of 30 days prior to said cancellation.

Additional Insured: San Francisco Unified School District, its Board, Officers and employees should be named as additional insured on General Liability and Automobile Liability by Endorsement, to be provided with Certificate, specifying the San Francisco Unified School District is noticed by the Company as an Additional Insured entitled to a 30-day written mailed notice. Such policies are primary insurance to any other insurance available to the additional insured, with respect to any claims arising out of this Agreement. Insurances apply separately to each insured against whom claim is made or suit is brought.

3. Description of Project and Scope of Work

2006 Proposition A Bond funding provides for school building and site improvement which include: Americans with Disability Act (ADA) compliance; health, safety and building

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1 Copies of your insurance policy are NOT required and should not be provide with SOQ submission.
infrastructure improvements, and the greening of school yards. It is the greening of school yards that is the focus of this scope of work. The Landscape Architect firm or team chosen to work on this project will provide design services culminating in drawings and specifications that can be bid out to prospective contractors. The Landscape Architect firm or team will also be required to review and adhere to the SFUSD Project Standard Guidelines which will be issued at the start of the design process. If additional engineering expertise is required during the design process the Landscape Architect will acquire the additional consultants as an add-service to the contract between SFUSD and the Landscape Architect.

4. Description of Landscape Architectural Scope of Services

The scope of work includes reviewing the Alice Fong Yu ES Green Schoolyard Concept Plan created by Bay Tree Design (Attachment A), specifically phase one priorities discussed in the concept plan, and recommending any alternate and/or additional design features to be constructed within the budget constraints of this project. As outlined in the Alice Fong Yu Green Schoolyard report, section entitled “Schoolyard Greening Priorities and Proposed Project Phasing”, the design elements/priorities that are a part of this scope of work include:
1) Create the middle school entry space and entry area on 12th Avenue. This will include the perimeter fence and new gates, the wheelchair accessible pavement, new picnic tables and major plantings.
2) Add the irrigation and major plantings to the informal nature area above the middle school yard, including any terracing that is necessary for the vegetation and to create maintenance trails through this space.

The Landscape Architect will be required to visit the site and perform a walk-through of the premises prior to submitting a proposal. Please contact either Julia Gourd at (415) 254-9440 or jullip@gmail.com OR Jade Moy at (415) 225-3838 or jade.moy@gmail.com to schedule the site visit. Site visits can be scheduled between September 6 and September 16, 2011.

The total budget includes expenses associated with but not limited to: architectural and engineering fees, construction inspection services, testing services, construction and contingencies, and administration fees such as advertising, printing, bidding and permits. The total construction budget to implement the green schoolyard project is estimated to be $100,000, and assumes a 10% construction contingency for unforeseen conditions.

The Landscape Architect will work directly with Alice Fong Yu Elementary School’s Principal, Green Schoolyard Committee and the Green Schoolyard Project Manager to establish and follow a project schedule based on issuing a Notice to Proceed for construction as early as possible. The Notice to Proceed with construction is estimated to be April 24, 2012.

Landscape Architectural Consultants Responsibilities:
Landscape Architecture firm staff is required to:

A) Conduct Project/Site Assessment:
   • Review Scope of Work requirements at Alice Fong Yu Elementary School.
• Review the Concept Plan developed by Bay Tree Design green schoolyard committee. The content of this concept plan must be addressed/incorporated into the final design.

• Thoroughly **document existing conditions** in the areas that may be impacted by green schoolyard elements. Site assessments shall include identification of functioning water supply for irrigation installation.

B) Provide Design Development Services:
• Meet with District Representatives and school site staff, allowing the school to communicate essential project elements as well as review and adjust specific concept plan proposals.

• The selected landscape architecture firm must conduct at least two site visits and a minimum of four (4) to six (6) design development meetings with the school’s Green Schoolyard Committee prior to conducting the final design review meeting.

• Develop green schoolyard designs and ultimately corresponding drawings and specifications with the participation of green schoolyard committee. These designs **must** consider budget constraints. The project’s program and scope should be addressed and revised as necessary as priorities change.

• Provide cost estimates for project elements at 50%, 90%, and 100% completion.

• Facilitate DSA and other government agency reviews, approvals and permitting of project elements, if necessary. Fees for permits will be reimbursed by the Green Schoolyard Program from the project budget and will potentially impact the available funds for construction.

• Present the final review of project drawings and cost estimates to SFUSD Bond staff as well as the school’s Principal and Green Schoolyard Committee.

• Prepare construction Bid Documents at 50%, 90% and 100% completion for submittal and review. The landscape architect shall prepare and submit 100% complete Construction Bid Documents to the Division of the State Architect (DSA) for approval, if required, and make any recommended revisions.

• Assist in determining the number of additive alternates necessary to keep final construction costs under control.

C) Submit Final Construction Drawings, Specifications and Cost Estimates to SFUSD and others as necessary:
• Prepare and submit final drawings and design details (in hard copy and in high-resolution PDF format), specifications, and priorities that are approved by the school’s Green Schoolyard Committee and Principal to the Green Schoolyard
Project Manager for review by January 30, 2012. These documents should include:

- Existing conditions (verified in the field),
- Design sketches of all main concepts including color perspective and/or 3-D images and elevations necessary to illustrate design concept,
- Demolition plans, notes, legend, and details,
- Color landscape plan identifying hardscape materials, plantings and other site work elements,
- Planting Plan. A planting plan is required even if planting is not included in the contractor’s scope of work and should be included in the construction drawings. If planting is not included in the contractor’s scope of work the planting plan should be marked “Not in Contract.”
- Layout plan, notes, legends, and details,
- Grading plan, notes, legends, and details,
- Irrigation plans, notes, legends, and details,
- Construction detail drawings, notes, and legends,
- Color and materials booklet (min. 11” x17”) in color providing list and images of materials, plants, and product selections,
- Prepare and coordinate with SFUSD the Division 0 and Division 1 specifications provided by SFUSD into the bid documents. Prepare Division 2 and greater specifications,
- A cost estimate, and
- Incorporate hazardous materials mitigation documents (specifications and drawings) provided by District’s consultants into the final bid documents, if required.

- Submit a final set of drawings containing all edits & revisions in high resolution PDF format as well as final specifications for bidding to SFUSD document printing vendor, ARC (formerly Ford Graphics) Planwell department no later than February 23, 2012.

- Participate in the BID process (review and analysis) which will include attending job walks, responding to pre-bid request for information (RFI), preparing addenda, and obtaining DSA approval of addenda (as needed).

Please note that all designs and subsequent construction drawings must adhere to SFUSD Project Standard Guidelines. These standards will be provided to the selected landscape architect once the contract has been awarded.

D) Provide Construction Administration:

- Provide detailed information related to design, drawings and specifications as requested by SFUSD representatives and contractor.

- Visit site weekly during construction to review progress, quality of work, and conformance to intent of Contract Documents. If additional visits are needed to review layouts etc., this should be included and expected as well.
• Utilize District’s project management software, IMPACT, to facilitate communication and track documents between the District, District’s agents and contractor. Relevant staff training on IMPACT will be necessary.

• Provide construction administration, including review of submittals, attendance at all job-walks, pre-construction meetings and weekly on-site meetings, preparation and implementation of DSA (and non-DSA) approved change orders with drawings, if applicable, respond to requests for information (RFI’s), issue Architect’s Supplemental Information (ASI), Informational Bulletins (IB) and clarifications, review contractor submittals, payment requests and proposed change-order (PCO) requests, and issue weekly field reports after each construction meeting.

• Compile punch list at Project Completion in conjunction with Contractor, Project Manager and Inspector.

• Participate in project close-out tasks which will include the preparation of a punch list, the review of warranties and guarantees, and the review of and approval of the final contractor payment. Assume a lead role in project close-out including DSA file closing (as needed), and submit copies of the following items as one hard copy and on 2 recordable compact discs (CD-R):
  
  ▪ Scanned files of the Contractor’s redlined Field Set (hard copy) noting all approved changes made in the field during construction. The scanned files can be either on PDF or TIF format.
  ▪ An editable, high resolution PDF format version of both the updated drawings and specifications, incorporating the “As-Built” redlines as noted above and received from the contractor recorded on site.
  ▪ An AutoCAD format (version 2004 or later) version of the project drawings, and
  ▪ The project manual (hard copy & PDF)

These items should include any related change orders, revisions, bulleting, clarification drawings and sketches. These documents should bear a stamp and signature from the Landscape Architect of Record and DSA stamp of approval, if applicable.

• Inspect the project site 1 year and then 18 months after substantial completion, before the 2 year warranty period for the contractor expires.

5. District Responsibilities

• Any hazardous material (“hazmat”) related work or mitigation thereof will be the sole responsibility of the District. The landscape architect will coordinate the documents provided by the District’s hazmat consultant into a complete package.
• Coordinating the bidding phase, including advertisement and distribution of bid documents.

• Coordinating the administration of the construction contracts including provisions of inspection, special testing engineers, industrial hygienists, construction management firms and specialty consultants, if required.

• The district will provide site topographic surveys and geotechnical reports if available. As noted above, the landscape architect will work with the District to determine the scope of services required for the project.

II: DISTRICT PROCESS FOR CONSULTANT SELECTION

All responses to this RFQ will be reviewed by the green schoolyard committee. Those firms that qualify may be invited to participate in an oral interview and presentation with the green schoolyard committee. Specific information regarding the interview will be provided upon notification of the firm completing the preliminary screening.

Requirements for applicants include:
  a) Landscape Architects Licensed in the State of California
  b) A minimum of two (2) years experience in the design of green schoolyards, educational settings, and ecological landscape design
  c) Experience in access design for educational settings

The District will accept written questions and comments from prospective consultants through Monday, September 12, 2011, close of business. The last addenda will be issued by Wednesday, September 14, 2011. Any addenda will be posted to the District web-site.

The District and green schoolyard committee reserve the right to make a selection anytime during the selection process in the event that the District or the committee can readily make a clear determination and selection from the proposals without conducting an oral interview.

III: CONTENTS OF PROPOSALS AND EVALUATION CRITERIA

Submit four (4) bound copies and one (1) digital PDF copy on a CD or DVD of the SOQ to the following address by 2:00 PM on Monday, September 19, 2011:

Lori Shelton, Project Manager
San Francisco Unified School District
2006 Proposition A Bond Green Schoolyard Program
135 Van Ness, Room 216
San Francisco, CA 94102

RE: Alice Fong Yu ES Green Schoolyard Project

Maximum length for proposal/submittal (20 pages, Ariel or equivalent, 10-point font minimum)
Please provide the following information, in the order given below. Proposals will be carefully reviewed and scored based on the information you provide. Adherence to proposal requirements is worth 10% of the total score. Points will be deducted if requested information is not included.

1. Introductory/Cover Letter (maximum length 1 page)

2. Professional Qualifications and Relevant Experience.
Alice Fong Yu Elementary School will use the following selection criteria to evaluate each applicant (100 points maximum):
   - Experience in the design of green schoolyards, educational settings and ecological landscape design and Green Building Practices (30 points)
   - Rapport: Ability to work with the Green Schoolyard Committee and school community (20 points)
   - Creativity, design approach and artistic merit (20 points)
   - Demonstrated ability to meet budget and schedule (20 points)
   - Adherence to RFQ requirements (10 points).

The following section should address the afore-mentioned criteria while also providing:

   o The full name and address of the firm or team
   o The name and phone number of a designated contact person
   o A brief description of the firm including a Statement of Purpose. Include a description of typical services to clients of the firm
   o List of all credentials, certifications and licenses (including credential, certificate and license numbers). Copies are NOT required and should not be included in the SOQ submission.
   o A description of the firm’s professional qualifications and experience, including those of any sub-consultants, in order to clearly demonstrate your ability to successfully furnish the landscape architectural/design services described in this RFQ.
   o A discussion of the firm’s understanding of the landscape architectural/design services required for this project and the firm/team’s ability to meet these requirements.
   o Provide a reference list of not less than 4 clients of the firm and/or joint venture group. This list should include clients for whom your firm has provided similar architectural design work during the past four years. This reference list should include:
      • the clients’ name, addresses, contact names, telephone numbers,
      • a brief description of each project,
      • project duration (please note whether project completed on schedule)
      • an original budget and schedule, and
• a final cost and schedule for each referenced project. 
There should be a clear focus on projects done on public school grounds that 
emphasize schoolyard greening. *Be sure that the contact person listed is able to 
speak about your firm’s involvement/performance.*

o Provide a list of projects each valued between $50,000 - $100,000.

o Citations, Disbarments and Claims: Provide a statement describing any and all 
of the following which the landscape architect has received in the past three (3) 
years (maximum length; 2 pages):
  • “Claims” – Both insured and uninsured claims which have been paid for 
    errors, omissions, or defects in work product or activities provided or 
    performed by the company.
    This statement must be signed by an officer or principal of the architect’s 
    company and accompanied by the statement “Under penalty of disbarment I 
    certify that this information is complete and accurate.”
    • Should the landscape architect not have any claims the 
      landscape architect should provide a statement to this effect, 
      signed and certified in the fashion described above.
    • Should the landscape architect not have been in business for 
      three years, the history of claims for all of the company’s 
      principals and officers must be provided to equal the required 
      three year period.

3. Project Team

Provide the names of the principal-in-charge and the assigned staff members who will 
comprise the core of your firm’s Project Team. Please provide brief resumes for the key 
members of your Project Team including years of experience in the following practice areas:

  o Educational
  o Recreational
  o Commercial
  o Residential

If members of your team have other relevant certifications (LEED, ARCSA, etc.), be sure to 
list them.

4. Proposed Fee, Basis of Charges and Name of Insurance Companies:

Submit an outline of the fee proposal to undertake all of the tasks specified in the Scope of 
Work, using project duration information provided. The proposed fee should be based on a 
lump sum and should include a schedule of values. *The consultant should also include the 
firm’s unit hourly rate.*

The proposed fee shall include all associated costs for the following but not limited to 
materials, equipment, travel, pager services, phone service calls, reproduction, mailing, and 
profit. Payment will be approved on a performance basis for a total figure not to exceed the
fee set for the project. Attachment D illustrates the requisite format and information that must be included in the fee proposal.

Provide a list of the insurance companies with which your firm/team holds relevant policies.

5. Agency, Relevant Code and ADA Experience
   Please discuss your firm’s experience over the last five (5) years with the following:
   - Division of the State Architect
   - California Building Code including Title 24, California Code of Regulations as it applies to educational building construction
   - Americans with Disabilities Act (ADA)
   - California Green Building Standards Code

IV: RFQ/Project Schedule:
Assuming Construction takes place during the summer 2012, the estimated schedule is as follows:

- Required site visit by Landscape Architectural firms 9/6/11 - 9/16/11
- Final RFQ Questions due to SFUSD, 2:00 PM PST 9/12/2011
- SOQ submissions due to SFUSD, 2:00 PM PST 9/19/2011
- SOQ evaluation & Landscape Architectural firm interviews by Green Schoolyard Committee 9/21/11 - 10/5/11
- Communication of selected Landscape Architectural firm due to Project Manager, 2:00 PM PST 10/5/2011
- Landscape Architectural firm tentatively identified 10/6/2011
- Anticipated approval to award landscape design services contract by Board of Education 10/25/2011
- Professional Consulting Agreement (contract) due to SFUSD 11/2/2011
- Estimated start of design process with site 11/2/2011
- Deadline to submit 100% completed Bid Packages (drawings & specifications) to SFUSD for review 1/30/2012
- Construction project advertised to public (week of) 2/27/2012
- Final Bid Packages submitted to printers 2/23/2012
- Final Bid Packages available to public for purchase and review 2/27/2012
- Estimated dates for job walk 1 with contractors (week of) 2/27/2012
- Estimated dates for job walk 2 with contractors (week of) 3/5/2012
- Estimated dates for construction project bid opening (week of) 3/12/2012
- Anticipated approval to award construction contract by Board of Education 4/10/2012
- Estimated date to issue Notice to Proceed (NTP) to contractor 4/24/2012
- Estimated date to hold pre-construction meeting with construction team (week of) 4/24/2012
- First day of construction 5/30/2012
- Substantial completion for construction 7/27/2012
- Final completion for construction 8/26/2012
- First day of school for the Academic Year 2012-2013 8/13/2012

The District reserves the right to modify the project’s schedule as necessary.
For questions or requests for clarification, direct your inquiries to Lori Shelton at the address specified in “Submit Bids” or by phone at (415) 241-6152 ext. 1557. Your proposal will be evaluated by the Alice Fong Yu Elementary School’s Principal and Green Schoolyard Committee.

Notes:
All proposals, project drawings and specifications become the property of SFUSD.

Verbal responses to questions regarding this RFQ shall in no way change or modify the RFQ requirements.

Proposers shall not be reimbursed for any costs associated with the preparation of proposals in response to this RFQ.

The District reserves the right, at its sole discretion, to modify RFQ requirements, cancel the selection process or amend the schedule.

V: ATTACHMENTS

A. Alice Fong Yu ES Green Schoolyard Plan report and Concept Plan created by Bay Tree Design
B. SFUSD Sample Contract
C. DVBE Requirements
D. Fee Proposal Format

VI: DOCUMENTS AVAILABLE FOR REVIEW

Other information pertaining to work at specific school sites is available through review of the following documents:

1. 2006 Proposition A Bond Language:
3. SFUSD Project Standard Guidelines – Emailed upon request
ALICE FONG YU ALTERNATIVE SCHOOL
GREEN SCHOOLYARD PLAN

SAN FRANCISCO UNIFIED SCHOOL DISTRICT
2006 PROPOSITION A BOND
JUNE 8, 2010

PREPARED BY:
BAY TREE DESIGN, inc.
environmental planning & design · ecoschool design® · edible landscapes
berkeley · california · 510.644.1320 · www.baytreedesign.com
GREEN SCHOOLYARD PLAN PARTICIPANTS

SAN FRANCISCO UNIFIED SCHOOL DISTRICT

Lori Shelton, Project Manager, Green Schoolyard Program
Tamar Barlev, Assistant Project Manager, Green Schoolyard Program

SAN FRANCISCO GREEN SCHOOLYARD ALLIANCE

Arden Bucklin-Sporer, Executive Director
Rachel Pringle, Programs Manager

ALICE FONG YU ALTERNATIVE SCHOOL

Liana Szeto, Principal*

PARTICIPATING FACULTY & STAFF

Lori Chao
Amy Chiu
Gina Chow
Paisy Chu*
Elanor Dong
Lisa Ernst
Annie Fang
Robert Francoeur
James Haddon*
Stefanie Hui*
Sabrina Huie
Susie Lam
Katherine Lau
Amy Lee

Belinda Lee
Calvin Leung
Jessie Li
Lila Luk*
Pauline Ly
Stephanie Ma* (Chair, Green Schoolyard Committee)
Tim McDonnell
May Ng
Elaine Tam
Benton Tom*
Marc Williams
Mei Wong
Sandra Zhao

PARTICIPATING PARENT ASSOCIATION & COMMUNITY MEMBERS

Nancy Buffum*
Julia Gourd*
Mark Kelly
Charlotte Moore
Jade Moy*

Mary Beth Pudup
Barry Wong*
Kesinee Yip
Edwin Yuen

PARTICIPATING STUDENTS

Approximately 40 middle school students participated in the children’s design workshop.

* = Green Schoolyard Committee members

BAY TREE DESIGN, INC.

Sharon Danks, Principal-in-Charge
Annie Youngerman, Project Assistant
Berkeley, California
510.644.1320
info@baytreedesign.com
www.baytreedesign.com
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Appendix A: Goals & Ideas for the Green Schoolyard at Alice Fong Yu School
Appendix B: Site Walk Maps
Appendix C: Photographs of the School Grounds
Appendix D: Middle School Students’ Design Ideas for the School Grounds

STAND ALONE ITEMS

11x17 Poster: Green Schoolyard – Project Summary
11x17 Poster: Green Schoolyard – Participatory Design Process Summary
2006 PROPOSITION A BOND PROCESS

In September 2009, the Alice Fong Yu School community began a participatory schoolyard design process as part of the SFUSD 2006 Proposition A Bond’s Green Schoolyard Program. The overall goal of this bond-funded project is to enrich the schoolyard with additional recreational, educational, and ecological features that will make it a more exciting, beautiful, interesting, and comfortable environment for students and adults.

The SFUSD 2006 Proposition A Bond program is contributing $150,000 to “green” Alice Fong Yu School’s grounds. The ideas for this renovation were developed using a participatory design process that included Alice Fong Yu School’s teachers, Parent Association (PA) representatives, and other school community members, assisted by environmental planner Sharon Danks of Bay Tree Design, inc. This initial planning phase, completed in May 2010, resulted in a concept plan that is intended to guide the future development of the school’s garden program, outdoor teaching spaces, and play areas in the years to come. The plan’s design is more ambitious than the bond funding will be able to cover, so the school community has also expressed their priorities and determined which areas they would like to develop first, using their bond funds. (These portions of the project are referred to as “Phase One” in this report.) The school community intends to raise additional funds in the coming years, to continue to develop the yard according to the plan.

The next phase of work will begin with the school community’s selection of a landscape architect, who will work with them to develop the design in more detail for the Phase One area(s). The landscape architect will build on the ideas in the Concept Plan, developed during this phase, prepare cost estimates, and identify the more specific scope of work to be constructed using the bond funding. The landscape architect will then develop construction documents for the areas to be built and provide construction administration for these areas. It is anticipated that the infrastructural elements of this project (pathways, irrigation, and other major construction) will be accomplished by professional contractors, and that smaller portions of the planting and light construction may be accomplished by the school community with the help of neighborhood organizations and volunteers.

SCHOOL COMMUNITY & ESTABLISHED GARDEN

The goals, objectives, spatial layout, and implementation priorities for this green schoolyard plan were defined by a committed group that included the principal, the Green Schoolyard Committee, teachers, parents, PA representatives, and other school community members. Many of these dedicated individuals regularly donate their time to help with various projects at the school, and were active throughout the process. Over time this schoolyard will flourish because of the supportive principal and dedicated school and community volunteers.

Alice Fong Yu Alternative School is already home to a thriving school garden that is one of the strongest programs of its type in San Francisco. Established in 1998, students from grades K-5 come out to the hillside garden weekly or twice monthly to learn about horticulture, edible crops, nutrition, and a wide variety of other academic subjects. Garden classes are led by garden teacher, Stephanie Ma, and are also attended by the students’ classroom teacher, and integrated into their curriculum. The Proposition A Bond’s modernization construction phase is currently underway at this school, and will be building a wheelchair accessible garden space.
PROJECT KICK-OFF

The green schoolyard project at Alice Fong Yu School began with a kick-off meeting with teachers and Parent Association (PA) members to discuss the idea of enhancing the schoolyard. Environmental planner Sharon Danks of Bay Tree Design, Inc., led this meeting in October 2009, and presented a schoolyard ecology slideshow to open the conversation and brainstorming session.

The full faculty body and five parents attended the kick-off meeting. Others in attendance at this meeting included Principal Liana Szeto, Lori Shelton and Tamar Barlev (SFUSD Green Schoolyard Program), and Arden Bucklin-Sporer and Rachel Pringle (San Francisco Green Schoolyard Alliance).

The kick-off session opened with a short presentation given by two teachers, Benton Tom and Paisy Chu, who presented work they had recently completed as part of an educational workshop at the California Academy of Sciences, examining the ways in which they might make Alice Fong Yu School’s buildings more environmentally-friendly. Their presentation included a model of the school, illustrating a rooftop solar array, rainwater collection, and other features. (See photograph below, right)

The green schoolyard meeting followed their presentation, and began with an explanation of the Proposition A Bond’s green schoolyard program. SFGSA staff, Rachel Pringle and Arden Bucklin-Sporer—both former garden teachers at Alice Fong Yu—also introduced their organization and invited the school to seek their help with the green schoolyard project.

Sharon Danks of Bay Tree Design then gave a slideshow that illustrated some of the approaches that other schools have used to enhance their school grounds and encourage schoolyard ecology, as well as a variety of ideas for enlivening outdoor learning and diversifying play. After the slideshow, the teachers and parents brainstormed ideas that they would like to see on Alice Fong Yu School’s grounds. After the lists were completed, each participant received 8 stickers that they used to “vote” for their top priorities. Participants were allowed to spread out their votes, or to put more than one sticker on a specific item if they felt strongly about it.

The school community used this kick-off meeting to articulate their goals for the schoolyard’s future development and created a list of initial project ideas to be incorporated into the yard. A full list of the ideas generated during this meeting is included in Appendix A: Goals & Ideas for the
Green Schoolyard at Alice Fong Yu School. A summary of the items that received the most votes from the school community, is listed below. The ideas the adults brainstormed were grouped by their themes to articulate the goals for this project. These ideas were also used to create a vision statement for this project.

GREEN SCHOOLYARD VISION STATEMENT

The Green Schoolyard Project at Alice Fong Yu School seeks to use outdoor space creatively to develop a verdant, sustainable environment, while fostering a better appreciation of the natural world and stewardship of our school site. We would like our schoolyard to include more green spaces for the children to explore, rest, and play in creatively; outdoor learning opportunities; and places for the entire school community to enjoy.

GOALS & KEY PROJECT IDEAS

To achieve their overall objective of improving the schoolyard’s work and play environment, the Alice Fong Yu School community developed a set of goals, striving to create a more comfortable, beautiful space grounded in local ecology, with strong educational opportunities, and a wide array of recreational options. Their goals and key project ideas are as follows:

GOAL #1: IMPROVE SCHOOLYARD COMFORT & AESTHETICS

- Make the schoolyard more comfortable by adding shade, seating, and places to relax
- Improve the thermal comfort of indoor classrooms by planting a “green curtain” of vines along the school building’s wall in sunny locations, to partly shade the windows, and to soften the light inside
- Add a bamboo grove to screen the garden’s edge from the adjacent outdoor hallway
- Include a flowing water/watershed art piece onsite

GOAL #2: DIVERSIFY PLAY OPPORTUNITIES IN THE SCHOOLYARD

- Include a variety of active play and physical education options, including a nature trail that can be used for fitness
- Create places for imaginative and nature play (e.g. playhouse/tree house, boulders, water painting, etc.)

GOAL #3: IMPROVE SCHOOLYARD ECOLOGY

- Install a stormwater catchment system to help irrigate garden plants; include fog collection if feasible
- Create butterfly and pollinator gardens
- Use native trees and plants to conserve water, attract wildlife, and reflect local ecology
- Include renewable energy systems onsite

GOAL #4: CONNECT THE CURRICULA TO THE SCHOOLYARD

- Include Chinese cultural themes in schoolyard artwork, signage, learning and play spaces
- Paint a “human sundial” on the playground
- Expand the edible garden to include a new greenhouse, more fruit trees, an outdoor oven, etc.
**KEY SITE WALK FINDINGS**

In October 2009, the Alice Fong Yu Green Schoolyard Committee worked with Bay Tree Design to examine the existing physical conditions and programming of the school site. A group of about ten parents and teachers accompanied Bay Tree Design on a comprehensive walk of the school grounds. Some of the issues discussed included: the existing uses for each area of the yard, pedestrian and vehicle circulation, schoolyard ecology, outdoor infrastructure, and opportunities for improvement. The information gathered during this site walk was mapped, in diagrammatic form, to convey the most important findings to the rest of the school community and inform the design process. Copies of these maps are included in Appendix B: Site Walk Maps, and a summary of these findings are discussed below. Photographs of the school site, taken by Sharon Danks of Bay Tree Design, inc. in Fall 2009, are included in Appendix C: Photographs of the School Grounds.

**EXISTING USE PATTERNS**

The school site is located on a steep hillside, with approximately 50 feet of elevation change from the highest to the lowest point on school grounds. To accommodate this dramatic grade change, the school grounds are divided into numerous, separate, relatively flat yard spaces, each at its own elevation. The yards are separated by retaining walls, access ramps, and steep hillsides. They intersect with the school buildings on several levels, as the buildings’ architecture steps down the hill.

**Paved playgrounds**

The largest, paved, schoolyard spaces are the elementary school playground, at the lowest level, and the middle school playground, located uphill from the elementary yard. The small middle school yard is, itself, divided into two slightly different levels. Each of these intensively used spaces accommodates physical education classes, recess/lunch breaks, and after school activities. They are the only onsite, outdoor areas that are suitable for ball games, and include striping and equipment for playing basketball, four-square, volleyball, and other games. Other painted playground lines include hopscotch, a variety of circles, and a three-lane running track.

Each of these playgrounds has a stepped, concrete amphitheater onsite to facilitate large gatherings and make use of an adjacent grade change. The lower yard is also home to a climbing structure on a rubber mat.

**Entry courtyards**

The elementary and middle schools each have their own entrances on 12th Avenue, where pick up and drop off occurs. Both entrances are primarily intended for pedestrians, although the elementary school entrance is wide enough to allow a single vehicle to pull in and park. The elementary school entrance, lower on the hill, is also used for deliveries coming into the school, since the cafeteria and main office are nearby. The middle school entrance courtyard is also used as a waiting area and social space by parents before and after school, and its covered portion is sometimes used as a physical education space by the PE teacher on rainy days.
School garden

The well-established school garden sits near the top of the school site along Lawton Street, and flows downhill toward the middle school yard. The raised beds in the garden were built to accommodate the hill’s topography, and make excellent use of this space. The garden includes a tool shed, an informal outdoor classroom space, and a well-loved digging bed. It is used by garden classes on a daily basis, and is also used: by the students’ garden club; as a lunch break play space (when supervised); by the GLO after school program; on parent work days; and as a venue for special events.

As part of the Proposition A Bond’s modernization process, a new, wheelchair accessible garden space will be added to the existing garden on a relatively flat, adjacent area along 12th Avenue. This new space will extend the existing garden and serve the same functions.

Lightly used spaces

There are three large areas on school grounds that are unpaved, and are very lightly used due to their steep grades or somewhat inaccessible location. The first is a hilly “landscape strip” located between the elementary and middle school playgrounds, sandwiched between two ramps. This planting strip has some existing, drought tolerant shrubs planted inside it, but they are quite difficult for students to see due to a dense metal fence constructed on all sides of this planting area. The fence around this space is intended as a safety barrier—and portions of it certainly serve that purpose where the grade change is significant. However, the fence line appears to have been installed around much more of this space than is actually needed. A significant portion of the eastern part of this planting strip, could be safely unfenced, if desired, making the planting bed much more visible and useful.

A second, much larger under-utilized area sits above the middle school yard. This upper hillside space is planted with some shrubs and a few trees. In 2002, it was planted with a garden intended to attract pollinators, and some of those shrubs still remain. Children sometimes use this space informally, but the soil is somewhat prone to erosion due to the steep grade and lack of pathways.

The third, and largest under-utilized space is a piece of school property that is accessible to the public, at the front of the school along 12th Avenue and Lawton Streets. This mulch-covered space has a small number of stone picnic tables and some large shade trees. It is often used as the receiving area for “class gifts” given to the school by graduating students, so there are some items in the landscape that have sentimental value. At the same time, neighbors use this area for walking their dogs, and the school reports that the dogs’ droppings are often left onsite. The new wheelchair accessible garden space will be installed within this large, open piece of land along 12th Avenue, and will divide it into three parts of varying sizes: a large northern portion near the front entrance (downhill); the new wheelchair accessible garden, walled off from the adjacent areas with a tall, locked security fence; and a piece of corner property that includes some large trees.

SCHOOLYARD MICROCLIMATE VARIETY – SUN & SHADE

The majority of the elementary and middle school playgrounds are exposed to the elements, with very little shade in the afternoon. This is particularly true on the elementary schoolyard, which does not have any trees. On very hot or rainy days, however, children can seek refuge under some of the building’s overhangs around the edges of this yard. The hillside trees above the middle school yard cast some shade there that varies in size with the seasons. The new and existing garden spaces both receive direct sunlight for most of the day, throughout the year, which is ideal for plant growth. The open space on 12th Avenue is almost always shady due to the wide canopies of the mature trees in that area.
PEDESTRIAN & VEHICLE CIRCULATION

As mentioned above, the school has two formal entrances for pedestrians, divided by grade level. The elementary school students enter through the lower gate on 12th Avenue and the middle school students come in through the upper gate on the same street. Student pick up and drop off areas, and bus zones, are immediately outside these gates. Students also enter the school through a lower gate on Funston Avenue, and sometimes through an upper gate near 12th and Lawton Streets, next to the garden. The GLO after school program uses two entrances/exits that lead directly out of the elementary school building’s lower level, opening directly onto 12th Avenue and Funston Avenue.

Delivery trucks usually park outside the school and bring their goods in using handcarts. There is also a single space for a vehicle to park just inside the elementary school gate, if that is needed. That location is immediately adjacent to the cafeteria, so is useful for related deliveries. The main office is also nearby. Deliveries to the garden come into that space through a garden gate on Lawton Street. Maintenance vehicles and garbage/recycling trucks may park along Funston Avenue where they can easily access a utility area, or they can pull into the lower portion of the middle school yard. It is possible for other vehicles to the middle school yard, but they rarely do.

Since this school’s grounds are divided into so many different levels, with very little vehicle access, there is not an emergency vehicle lane/right-of-way on the playground. Instead, emergency vehicles serve the school from the adjacent streets, when they are needed.

WATER SOURCES

Our site walk team found three water sources (hose bibs) in the existing garden space, but we did not locate any other easily accessible water sources in other parts of the school grounds. It is possible that we missed some, but it also likely that they are simply not there because most of the space is currently paved. The existing unpaved spaces may also use an in-ground irrigation system that is more difficult to observe. If the school is considering adding more plantings to the site, it would be useful to confirm the location of all of the water sources, and to add more hose bibs if and where they are needed.

Our site walk group also noted that the school buildings have a large number of downspouts that are easily accessible on the exterior of the buildings. We marked them on the map in order to consider adding some rainwater collection cisterns. It appears, however, that the roof material used on the middle school buildings, where the downspouts are most easily intercepted, is made from asphalt shingles, which is not ideal for the water quality—and currently not an allowable surface for rainwater collection within SFUSD. If there is a way to improve the water quality of roof runoff from these locations, the school has expressed interest in doing so.

The existing garden is also home to a small pond in a raised bed. The pond circulation system runs using a solar powered pump system.
OPPORTUNITY AREAS

During the site walk, the Green Schoolyard Committee identified some opportunity areas onsite. A map of the key opportunities and constraints we identified is included below, along with a discussion of the main themes.

Constraints

For this planning process, we assumed that most of the heavily used, paved portions of the school grounds and the play structure, were fixed components of the school site. These areas were marked on the map above in red, in order to identify them as areas with constrained uses. The school buildings and walkways were also assumed to be fixed components.

Paved playgrounds

In the elementary schoolyard, our site walk team saw opportunities to: add more painted games and designs to the asphalt to relate it to the curriculum and expand play activities; add shade trees or shade canopies that do not conflict with PE games; create a small “ball-free” zone in part of the yard, to give children a wider variety of play options at recess including a space for imaginative play. (This potential ball-free area, north of the play structure, is noted in yellow on the map.)

The middle school yard is quite small and needs to be able to accommodate physical education classes and house some of the school’s maintenance and utility areas. Our site walk team noted, however, that there are opportunities to add more vegetation along the perimeter of the yard, to make the space feel softer and have more shade. We also identified some “nooks” along the building’s perimeter that are potential locations raised planting beds. Again, the asphalt, itself, is also a “canvas” that can be painted with more game lines or markings that related to middle school curricula, if desired.
Greening opportunities

In the elementary school yard, the group noted that the south facing classrooms often get overheated. To cool the building, we identified an opportunity to shade the façade using a "green curtain" of deciduous vines, to partially shade some of the windows during the warmest seasons. These windows could also be shaded using an architectural solution, such as awnings. (Changes to the building’s architecture are beyond the scope of the green schoolyard funding, however.)

The entry gate into the elementary yard from Funston Avenue, shown in the photograph on the right, is an opportunity create a more welcoming entrance into the school. This gate has a more utilitarian aesthetic than most of the entrances to this lovely school. Just inside the gate, there is also a large concrete shelf near an adjacent the stairway (shown) that could accommodate a raised planter, if the school wishes to add flowering shrubs or a small tree near the entrance.

The landscape strip between the elementary and middle school yards is currently enclosed by a dense metal fence that obscures the planted area in the interior, as shown in the photograph to the left. Adults can see over this fence, in some places, but young children’s views of this planted space are almost entirely obscured due to its height and density. While some portions of this fence are necessary, due to the height of the grade change, other portions that are close to the height of the adjacent lower ramp do not need to be fenced. There is an opportunity to remove the portions of the fence that are not required (on the east end of the planting strip), in order to improve students’ visual access to the vegetation.

The hillside above the middle school yard’s amphitheater is also an opportunity for increased greenery. This area is challenging to work with because it has a steep slope, and cannot be reached by a wheelchair ramp. It is, however, visually accessible to all students from the middle school yard. To improve its visual appeal and soften the overall feeling of the adjacent paved space, this zone could be planted with more flowering, drought tolerant shrubs, boulders, and similar features. Plantings could be designed to foster wildlife habitat for pollinators and birds, that the students can enjoy and study from below. The concrete amphitheater steps next to this planting space could also be enlivened with mosaic tiles or other artwork, if
desired. Physical education teacher James Haddon and others in the site walk group also liked the idea of creating a fitness oriented nature trail on this hillside, if a suitable pathway system could be worked out on the sloping ground.

This hillside above the middle school yard also curves around and connects to the bottom portion of the existing school garden. The site walk team and garden teacher Stephanie Ma suggested adding a screen of tall dense plants, such as bamboo, along one portion of the edge of this hillside space (shown on the map on page 8), in order to reduce distractions for garden classes, caused by students in the nearby outdoor hallway.

The site walk group did not recommend many changes to the well-designed, existing school garden. Their only suggestion for improving its layout was to consider making the beds narrower, to improve young students’ abilities to reach all the way across the beds, and re-orienting them to reduce erosion. These suggestions were only intended for consideration the next time the school needs to replace the raised beds. The beds are currently in good condition.

At the corner of Lawton Street and 12th Avenue, our group paused to look at the mature trees in the corner of the school grounds, and at the site of the future wheelchair accessible garden. Many members of the group were in favor of the idea of trying to expand the fence line for the new garden to include the corner of the grounds (with the trees), so that students would have a greatly expanded garden space to roam. A few members of the group felt that the plans for the garden fence should remain in a small footprint, in order to preserve the corner trees for the neighborhood to enjoy. These ideas were included on the opportunity map for the wider school community to debate during the design workshop.

Along 12th Avenue, we noted opportunities to use the wide open space in front of the school more extensively during the school day. Ideas included ways to connect this space to the curriculum, enhance play, and to make it an even more welcoming entrance to the school. The group also noted the stormwater downspouts along the front of the middle school building, and identified some places where cisterns might be placed to collect rainwater. (As noted above, the roof material in this location was later noted to be asphalt shingle, which the school district does not use for rainwater harvesting—so this idea had to be abandoned.)

Artwork opportunities

The site walk group noted many opportunities throughout the school grounds for new art installations. In the elementary school yard, art opportunities are present on the pavement and on the nearby retaining walls. In some places, old, chipped murals may be replaced by newer ones—and in others, new murals created. In the middle school yard, the wide, flat concrete surfaces of the amphitheater would be a good canvas for a mosaic mural, particularly on the risers, where the resulting picture could be seen from afar.
ADULTS’ PARTICIPATORY DESIGN WORKSHOP

More than twenty staff members and Parent Association volunteers met on November 12, 2009 to participate in an evening design workshop organized by Sharon Danks of Bay Tree Design, inc. Tamar Barlev, from the SFUSD Green Schoolyard Program, also attended the meeting. At the workshop, the participants worked in three small groups to combine the ideas generated during the project’s kick-off discussion with the site walk research, to come up with draft designs for the schoolyard. At the end of the meeting, each group explained their ideas to one another. The ideas in their designs, described below, were later incorporated into the concept plan.

GROUP A

As shown in the diagram on page 12, Group A would like to add the following features to the elementary school yard:

- a watershed-themed art piece with flowing water, in the elementary school’s entry courtyard. This space is crossed by a “bridge” walkway that frequently leaks onto the sidewalk below when it rains, so the group would like to turn this feature into an art asset in some way. They were also interested in storing rainwater in a cistern in the courtyard. Space is tight here, so they suggested an area under the stairs.
- a “green curtain” to shade the south facing classrooms in the elementary school building from strong sunlight.
- fruit trees and benches around the perimeter of the yard.
- added vegetation and flood prevention in the stairwell next to the Funston Avenue entrance.

In the planting strip between the elementary and middle school yards, they would like to remove the perimeter fencing where possible, and replace the portion that needs to remain with a picket fence or a dense shrub. They would like to add a tree house/observation deck overlook in the center of this planting strip, to be enjoyed from the upper level (middle school).

Their design for the upper part of the school grounds has a fitness and nature trail as the largest feature. This trail is designed to use the school’s topography as a key fitness asset. Its layout uses existing ramps and stairways a part of the path, but also exits onto the sidewalk along Funston Avenue for a short distance, and travels across the hillside above the middle school for a nature trail experience. The trail extends through the existing and new garden spaces, through the open space in front of the school along 12th Avenue, and back onto school grounds through the middle school entrance.
Other features of their design for the upper portions of the school grounds include:

- wooden bench(es) with planters along the edge of the middle school yard.
- butterfly garden plantings on the hillside above the middle school.
- an expanded garden footprint that includes all of the land at the corner of Lawton Street and 12th Avenue within the perimeter security fence. This allows them to remove all of the internal fences (existing and planned) so that the only garden fence is along the sidewalk. They would also like to add a large fish pond in the garden that would have a recirculating “creek” that flows downhill, through the new garden, and into the middle school seating area (described below).
- a new middle school eating area with outdoor seating, in the large open space in front of the school on 12th Avenue. This space would be surrounded by a low fence.
- rainwater catchment cisterns around the perimeter of the middle school building, collecting runoff from the middle school’s roof.
- green plants positioned against the fence at the edge of the school garden, where it borders the outdoor covered hallway for the middle school.

GROUP B

Group B’s design for the elementary school yard also includes a green curtain along the building’s south wall, and a second, smaller green curtain of vines along the retaining wall behind the play structure. They would like to create a water-themed art piece in the elementary school’s entrance courtyard, with rain chains that would artfully direct the flow of the water that drips from the surrounding buildings and walkways, into cisterns waiting below. In the area near the Funston Avenue entrance, they would like to add a shade trellis to the space that is north of the play structure, and plant some small trees or large shrubs on the concrete shelf to the north of the Funston Avenue entrance stairs. (This location is shown in the top photograph on page 9.)
In the planting strip between the elementary and middle school yards, Group B would like to plant a butterfly garden (to be enjoyed from afar), and irrigate this strip with rainwater from the rooftop of the middle school building. They would like to create a tree house/lookout in the center of this planting strip, accessible from the middle school level, at the flat landing in the ramp adjacent to this space. (This would make the overlook wheelchair accessible, since the supports for the overlook would be in the planting strip and its floor would be level with the ramp’s landing.)

In the upper portions of the school grounds, the plan calls for additional native and butterfly garden plants on the hillside above the middle school yard, and a trail that crosses this hillside along the hill’s contours. Where this hill turns the corner to enter the existing garden, they would like to create a suspension bridge to hold the trail up above the roots of the large, mature tree at that corner. At the edge of this same space, they would like to create a green wall of vegetation to screen the nearby outdoor hallway. The plan adds a designated “quiet space” in the existing garden. At the corner of Lawton and 12th Avenue, they would like to create a second tree house, in among the existing mature trees, and to add seating at ground level in the tree grove. The design includes a perimeter bamboo grove to enclose this space. An additional line of bamboo is arrayed along the sidewalk edge down 12th Avenue, and they also added more seating in the open space.

GROUP C

Group C’s design for the elementary school yard, shown on page 14, also includes a green curtain along portions of the building’s south wall, in combination with shade awnings that would be attached to the building to shade the third floor classrooms. The plan also creates two new shady zones along the elementary school yard. One would be along the west wall near the play structure, and the other shady zone would extend along the length of the playground’s south wall, below the perimeter ramp. A water
painting wall adds interest and a new activity to the quiet corner between the Funston entrance stairs and the play structure, and a painted sundial enlivens and enriches the playground’s asphalt. The plan also notes that night time lighting would be useful in the elementary schoolyard and elsewhere onsite.

This plan recommends removing the eastern-most section of the perimeter fence around the planting strip between the elementary and middle school yards, and enhancing the planted area with a butterfly garden. This plan also includes the elevated platform/overlook in the wide portion of the planting strip, where it aligns with the adjacent wheelchair ramp’s flat landing.

Group C’s plan recommends terracing the slope above the middle school yard so that it may be used as a nature trail in the future. They also recommend including a bamboo garden and a tree house on this hillside. In the existing garden, the plan shows a rain garden system that would direct the stormwater to a central water catchment area where it would create a pond. They also included a tree house platform nearby, to take advantage of the adjacent mature tree. (The “tree house” is shown near the tree, rather than in it.) This plan also includes the corner parcel, at 12th Avenue and Lawton Street, in the garden’s footprint, so that the existing, planned, and new corner garden space work together to create a much larger space. This extended garden would include seating around the tree trunks and elsewhere, an outdoor oven, and a rain catchment system using runoff from the middle school building’s rooftop. They would also add an attractive landscape with shrubs around the corner, near the sidewalk, to make the garden’s perimeter appealing to the neighborhood. Group C’s plan for the front of the school is to add a new set of bike racks near the middle school entrance, next to the sidewalk, and to add a “dotted line” of shrubs with benches to make a permeable edge to the open space in that location.

Draft green schoolyard design, created by “Group C” during the design workshop at Alice Fong Yu School, Nov. 12, 2009
CHILDREN’S PARTICIPATORY DESIGN WORKSHOP

On November 19, 2009, Bay Tree Design held a design workshop for a group of approximately 40 middle school students, to gather their input about the green schoolyard renovation. The workshop began with a 10 minute slideshow that included examples from other schools to illustrate what might be possible at Alice Fong Yu School. Students then spent about 30 minutes drawing their design ideas, and then presented their ideas to one another. Members of the Green Schoolyard Committee also attended the workshop and helped to supervise the children. Principal Szeto, Rachel Pringle (SFGSA), and Tamar Barlev (SFUSD) also attended.

MIDDLE SCHOOL STUDENTS’ DESIGN IDEAS

The students’ ideas ranged widely and included elements connected to their lessons, to play, and to making the schoolyard more beautiful and comfortable. Some students suggested seating in the form of benches, boulders, and picnic tables. Others wanted to see more ecology-related features such as rainwater collection, a lake, wildlife habitat areas, a living roof, and solar panels. Increasing the amount of plants onsite was a strong theme in the children’s pictures, with requests for shade, trees, a forest, flowering plants, shrubs, grass, and trellised vines reoccurring in most of the drawings.

The children also suggested thematic elements related to their school’s culture and community, such as: a Chinese mascot painted on the ground in the lower yard; “AFY Pride” added to the existing Golden Gate Bridge mural; and student handprints added to an art piece onsite.

There were many requests for more sports facilities, including handball, ping pong, and basketball. Their sense of playfulness also came through strongly, with requests to extend the playground’s climbing structures to the middle school students as well. They would also like to see things such as a wooden clubhouse, tree houses, “a climbable corner castle,” swings hanging from the trees, big slides down the hill, a climbing wall, permission to climb the trees, a campfire circle, a river, a domed playhouse, and outdoor musical instruments.

Samples of the children’s drawings are included at the end of this report, in Appendix D: Middle School Students’ Design Ideas for the School Grounds. Many of the children’s ideas and feedback were later incorporated into the concept plan.
MIDDLE SCHOOL STUDENTS’ FAVORITE & LEAST FAVORITE PLACES AT SCHOOL

While the students were working on their drawings at the design workshop, garden teacher Stephanie Ma and some of the parent volunteers who helped to supervise the workshop, spent time taking a “favorite places map” activity, developed by Bay Tree Design, around to each table of students. To complete the activity, the adults asked individual students where their favorite and least favorite outdoor places are on school grounds. Each child’s answer was recorded anonymously using a single red dot for their favorite place and a single blue dot for their least favorite place. The reasons for these likes and dislikes were also recorded on the map. The students were also shown an aerial photograph of their school site in order to orient them to the map.

As the map shows, students’ favorite places in the elementary school yard include the play structure, a shady pocket near the Funston Avenue entrance stairs, and the amphitheater. One student also listed basketball as a favorite activity. There were many “least favorite place” votes on the lower yard including the center of the paved ball play space. The most common comments explaining these least favorite choices are that children get “hit by balls” on the playground, or that the space is “too busy” or “too sunny.”

The planted area between the elementary and middle school yard only received “least favorite”/negative votes. The children’s comments about this space included, “scary” (for the utility area on the west end) and “make [this] spot likable!” toward the west end of the planting strip.

The middle school yard was filled with “least favorite place” dots, and comments such as “boring,” “hit by balls,” and “not much to do.” A few children noted that they liked a place near the middle school’s exit to Funston Avenue, and few like some places near the middle building that are shady. Similarly, the hallway between the middle school buildings received an overwhelming number of “least favorite place” votes, with just two reporting that they liked this area as a “hang out” place.

The spaces onsite that received the most numerous positive votes were a particular mature tree on the hillside above the middle school yard, the existing garden, and a tree on the corner of Lawton Street and 12th Avenue.
CONCEPT PLAN

After the design workshop, Bay Tree Design reviewed the school community’s ideas, including ideas presented by both children and adults, and combined them to create the first draft of the concept plan. This plan was subsequently reviewed and refined by Alice Fong Yu School’s Green Schoolyard Committee, Principal Szeto, SFUSD Green Schoolyard Program staff, and Bay Tree Design. The resulting concept plan, approved by the school community in May 2010, represents the culmination of the school community’s work to date.

The plan expresses the Alice Fong Yu School community’s collective vision for the school grounds, depicts their consensus about the direction their green schoolyard project should take, and illustrates the general spatial layout and programmatic goals and activities they desire onsite. The plan and this written description are intended to guide the future development of the schoolyard’s ecology, outdoor classrooms, and play spaces for the 2006 Proposition A Bond process and any additional, future work the school envisions for their site (to do on their own) over the next 5-10 years.

The description below summarizes the main ideas in the schoolyard concept plan and is intended to accompany the drawing for Alice Fong Yu’s green schoolyard, dated May 24, 2010. The text below follows the map, discussing each area separately. Please see the attached plan on page 19.

CENTRAL DESIGN CONCEPTS & GOALS

The design ideas in this plan follow a central set of concepts and goals that were developed through discussions with the principal, teachers (including the garden and physical education teachers), staff, PA, and community members over the course of the year.

**Overall concept:** The new concept plan continues to offer a full range of physical education and ball play activities, while balancing these needs with the school’s other objectives, which include: providing some shade in each area of the school grounds; offering a variety of recess play options; creating additional outdoor learning areas; making the school’s Funston Avenue entrance more welcoming; setting aside a new social space for middle school students; and creating inviting places for imaginative play and quiet reflection. The aesthetics of the new elements in the plan will be designed to reflect the Chinese cultural themes that are already present on the school site, to reinforce the special language and cultural program at this school.

**Comfort:** The new design will make the schoolyard a more comfortable place by providing shade, adding seating, and adding a small imaginative play area in the elementary yard where children can relax and play imaginatively, without getting hit by balls. The design also includes a “green curtain” of vines intended to shade the school building to cool some of the interior classrooms.

**Ecology:** The new school ground configuration is intended to bring greater habitat diversity to the site and attract local beneficial wildlife such as birds, butterflies, and other pollinators. The new plantings will include some California native plants and will emphasize seasonal change and drought tolerance. The newly expanded teaching garden will continue to produce crops in the fall, winter and spring, providing small quantities of healthy fruit and vegetables for the students to sample. All of the plantings onsite will be rich teaching resources. The garden will also include a rainwater cistern to help teach students about conserving water. The new planted areas will also be watered using drip irrigation to conserve water.

**Education:** The informal nature area around the perimeter of the middle school yard will become a vibrant, outdoor learning space, with curriculum-tied features intended to provide teachers with additional resources to enhance the coursework they are already teaching. The smaller green spaces
onsite will also be informal educational tools that children can explore during recess, or that teachers can use during class time. All of these spaces will broaden the urban children’s physical experiences as well, as they explore the natural materials found in these new environments (e.g. smooth boulders, mulch and other wooden items with interesting textures, plants in many colors, etc.)

**Recreation/Play:** The plan includes areas devoted to active play, exploration and creative adventures in addition to the play structure and ball play areas that are already present on the yard. The idea is to increase the diversity of play activities offered to the children so that they will have more choices at recess, while still fulfilling the needs of physical education classes. Physical education classes will now also use the whole site as a fitness and nature trail, extending their exercise walks and runs to the existing ramps, stairs, and other areas.

**Community Stewardship:** The schoolyard improvements will require some maintenance and at the same time provide the Alice Fong Yu School community with an opportunity to continue to personalize their space. The Parent Association and the Alice Fong Yu Green Schoolyard Committee plan to be active stewards of the grounds and will help to hold work parties several times a year in the coming years, to engage families in ongoing stewardship tasks. Students and their teachers may also be involved in caring for the grounds in some way.

### ELEMENTARY SCHOOL YARD

The new design for the elementary school yard seeks to balance opportunities for ball play and organized games with space for imaginative play, and adds some shade for the school building and play areas.

**Imaginative play area:** The plan adds a small, ball-free area next to the existing play structure that will allow students who want to engage in creative play to do so in an area where they won’t be as likely to get hit by balls. This space is envisioned as a place where the asphalt has been removed and a soft, natural surface substituted. A deciduous shade tree in the middle of the new zone will shelter the play environment below during the warmest months, and provide some shade to the edge of the play structure zone as well. The perimeter of this space is ringed by a narrow seat wall, covered in mosaic artwork, that defines the edge and keeps the loose ground surface in place. This zone has a variety of flowering shrubs around the perimeter, and an open-sided play house that is easy to supervise. The back wall, behind this space and the play structure, will hold a new mural.

Elements from the imaginative play zone will also extend into nearby areas. For example, where the safety surface for the play structure is not needed in the southwest corner, it may be removed to allow another shade tree to be planted in the ground. A water painting area is envisioned for the lower portion of the nearby ramp. This water painting area would not block the ramp in any way, since the idea is to allow children to paint with water on a surface that is prepared with a solid, painted color. This surface could be the wall, itself, or it could be a flat wooden board, attached to the wall. If this location is not suitable for any reason, the group also discussed putting the water painting area on the Funston Avenue wall, behind the play structure. (There were some concerns regarding supervision of this location, however, so the ramp location was preferred by the committee.)

**Welcoming entrance:** The plan includes some artful additions to the existing elementary school entrance on Funston Avenue. The design calls for a Chinese-style entrance arch at the top of the stairs, near the sidewalk (on school property), and some new, flowering bushes placed in a raised bed on the large concrete shelf in the stairwell below. The flowering bushes should be selected and pruned so as not to block the stairway.
Building shade: Since the south facing classrooms in the elementary school building often over heat in the direct sunlight, the plan includes a “green curtain” (a light screen of leafy vines on a trellis) to be installed to help shade the 1st and 2nd floor windows. This element would cool the interior classrooms, reduce glare inside, and soften the look of the building’s tall exterior wall. Similar “green curtains” are used successfully in schools and other buildings in Japan. (See photo) It is likely that the 3rd floor windows are too high for a green curtain to reach, so awnings should be considered to shade these upper classrooms. (Please note: awnings are not be eligible for green schoolyard bond funding.)

Bridge arbor: The plan includes an arbor on the elevated “bridge” walkway that connects the library with the elementary school building at the northeast corner of the yard. The arbor would provide some overhead shelter for travel between these two buildings, and would include flowering vines. Please note: this arbor will require careful construction due to its elevated location.

Playground shade: The plan includes two new trees on the schoolyard to provide some shade to the ball play areas. The trees will be situated near the south side of the elementary school yard, out of the way of the ball games. Their tree wells will be tucked in, next to the wall, and the trunks will not take up very much space in the yard. Earlier versions of the green schoolyard plan had also included several more trees along this wall, all the way to the eastern corner, but the school community felt that they would interfere with wall ball games in that location. The two remaining trees are situated near the elevated vista point, to give it a “treetop view,” and located in a place where the retaining wall is low, making it less useful as a wall ball location.

Playground striping: The playground striping and game lines that are currently on the yard are intended to stay where they are. Please note that the concept plan does not show all of these lines. The design includes some additional playground striping, to be superimposed over the existing lines in a way that does not reduce their intended uses. The newly painted features could include elements such as a “human sundial” mural (to allow a child’s shadow to indicate the time of day, on a painted mural on the ground), a compass rose, or a Chinese-style dragon-shaped number line, and other curriculum-tied and play-based patterns.
NATURE AREA BETWEEN THE ELEMENTARY & MIDDLE SCHOOL YARDS

There is quite a lot of space between the elementary and middle school yards that is currently underutilized. The new plan for this space maintains its primary use as a wheelchair accessible ramp that connects the schools’ various levels—but adds depth, interest, and beauty to this space at the same time.

In the new design, the wheelchair ramp is envisioned as an accessible pathway for exploration and learning, that travels through a space focused on nature and wildlife habitats. The surface of the pathway will be painted with nature-related patterns that connect to the school’s science curriculum, and could take the shape of fallen leaves (from local types of trees), animal tracks from local wildlife species, or similar ideas. The lower mural on the wall behind the ramp is currently deteriorating, and can be replaced with a nature-themed art piece in paint or mosaic tile, when it is time to replace it.

As students leave the play structure area and travel up the pathway, the planting bed becomes more and more visible as the retaining wall gets shorter. This planting strip will be planted with flowering and native plants throughout its length, and some trees in the western portion where the planting space is wider. All of the vegetation will be selected to attract local birds, butterflies, and other pollinators, for their visual appeal from the schoolyard, and for their drought tolerance. The planting strip will also include some wildlife habitat features such as bird houses and/or baths, in addition to the plants. The vegetated strip will be visually accessible to the students throughout its length, but will only be physically accessible at the far eastern end, where the retaining wall is very low. In this portion of the planting bed, the dense perimeter fence should be removed, allowing students to see the plants more clearly and to interact with them as part of their class work.

As students round the corner of the ramp and travel up towards the middle school yard, they will have a full view of the plants below. At the mid-point of the upper ramp will be a vista point/overlook, positioned to line up with the existing landing on the ramp. This elevated vantage point will have railings around the edge and an open roof structure, designed to fit in with the building’s aesthetic. This open structure will also make this place easy to supervise. Benches will be placed in the vista point structure to make this an ideal, wheelchair accessible gathering place for small groups of elementary or middle school students. The view from the vista point will include the trees and native plants in the planting strip. It will also include a special canopy-view of the trees below, planted in the elementary school yard.

MIDDLE SCHOOL YARD NATURE ZONE

The patterned pavement and themed plantings discussed above will also extend to the perimeter of the middle school building, as well, where it faces the middle school yard. Plantings in this location will be in raised beds or containers. At the south end of the middle school building, one planting area is wide enough to be an in-ground configuration, if that is desired. It will also include a small seating area made from cut logs or boulders, for added interest and convenience.

The central fence line between the two sections of the middle school yard is also a place that can host some added greenery. The plan includes two small shade trees, planted in small, in-ground tree wells. The central fence, dividing the two portions of the yard which are at different elevations, is also a place that can receive some greenery in the form of a vine with colorful flowers. The vine selected for this location should not be too dense, so that the yard will still be easy to supervise.

The middle school yard is already home to a very large, concrete amphitheater. The plan includes murals for the risers of the amphitheater, to enliven that space.
INFORMAL NATURE AREA

The informal nature area, on a hillside at the top of the middle school’s amphitheater, is a space that will be planted in a manner that continues the nature experience started below along the ramps—as an extension of the nearby nature areas at ground level. The enhanced plantings will include native shrubs and trees to attract birds and pollinators, as well as boulders and logs as landscape features and wildlife habitat. This area will be visually accessible from the middle school yard. Informal trails through this hillside space will allow the nature area to be more easily maintained on schoolyard work days.

EXISTING SCHOOL GARDEN

The existing school garden will remain largely the same in this plan, with the exception of a few small features to be added. A screen of live bamboo plants will be added along the northeastern corner of the garden, near the large shade tree, in order to screen the garden from the adjacent middle school hallway. A second shade tree, near the existing straw bale gathering area, should be assessed to see if it is healthy. If so, the tree should remain. If not, the tree should be considered for removal and replaced with a new tree or a shade canopy.

The plan includes a new rainwater cistern to be installed next to the existing tool shed. The cistern will collect rainwater from the shed’s roof, to be use in the garden.

NEW WHEELCHAIR ACCESSIBLE SCHOOL GARDEN

A new, wheelchair accessible school garden is planned as part of the Proposition A Bond’s modernization process. This garden, which will be built this summer (2010), will include outdoor classroom seating, storage cabinets, a white board, and garden beds. The garden will be surrounded by a security fence, and wheelchair accessible ramps will connect it to the middle school’s hallway and to the existing garden. The design of this garden, created by Levy Design Partners, leaves the parcel at the corner of Lawton Street and 12th Avenue outside the garden, so that the trees in that location can be enjoyed by the neighborhood.

MIDDLE SCHOOL SOCIAL SPACE & PICK UP AREA ON 12TH AVENUE

The remaining open space along 12th Avenue, in front of the middle school and the building’s main entrance, will become a semi-enclosed middle school social space and pick up area. A low perimeter fence, with a Chinese aesthetic, will be added along 12th Avenue with welcoming entry gates at the lower and upper ends of the space. The gates and fence will define the space as school property, but will not be locked. It is hoped that this fence and accompanying signage will deter dog walkers from using this area, so that the space will be clean enough for students to use regularly. The space will also include two paved areas, near the top and bottom of the slope, that will be wheelchair accessible, and will contain picnic tables. Other picnic tables, existing or new, will be spread out in the remainder of the space on the existing ground surface (wood mulch). Plantings will be added in the sunny portion of the site, near the north end. A bike rack will be installed near the plantings, in a paved area next to the building.

This enhanced space is intended as a social area for the middle school, which can be used by classes for academic work and during lunch breaks. It is also intended as a place for parents to wait for their children after school, and to socialize after dropping them off. As it is open to the public after hours, it may also become a (dog-free) neighborhood picnic location.

During our design process, we also considered adding rainwater collection cisterns to some of the downspouts along the building’s edge in this location. Unfortunately, the roof material appears to be unsuitable for this purpose. If upon further study that is found not to be the case, then the school would like to add rainwater cisterns here.
SCHOOLYARD GREENING PRIORITIES & PROPOSED PROJECT PHASING

The concept plan for Alice Fong Yu School’s green schoolyard includes ideas that are larger than the 2006 Proposition A Bond process, and are intended to be accomplished in the years to come. The school community has identified the projects within this plan that they would like to implement with the $150,000 funding from the bond. They have divided their green schoolyard plan into a prioritized list as described below, to accomplish their goals as the bond funds allow. They will try to raise additional funds, and in-kind donations of services and materials, to complete the later phases of the project, with the help of volunteers from the local community.

The Green Schoolyard Committee would like to focus their Prop A Bond construction funds on the infrastructure needed to create the green schoolyard, such as asphalt removal, irrigation and drainage systems, ADA compliant pathways, etc. The school community, in partnership with the PA and local organizations, would like to implement some of the smaller elements on their own (i.e. plantings, signage, etc.), following the advice of their landscape architect, to help extend their funding as far as possible.

Please note: For Phase One (Prop A Bond) projects, the work by the school community will be accomplished after the professional contractor(s) have completed their work and SFUSD has approved their installations.

PRE-PHASE ONE

Project to be completed by the 2006 Proposition A Bond modernization construction, before Phase One:

- The new wheelchair accessible garden will be constructed during the summer of 2010 by contractors working for the Prop A Bond’s modernization program. The school will plant vegetation in the planting beds when the construction process is finished, and the school district has approved the final stages of construction.

PHASE ONE

Projects to implement with 2006 Proposition A Bond green schoolyard funding as costs allow, with the help of a landscape architect and contractor, listed in order of priority:

1. The school’s highest priority for the use of their bond funds is to create the middle school social space and entry area on 12th Avenue. This will include the perimeter fence and new gates, the wheelchair accessible pavement, new picnic tables, and major plantings.

2. The school’s next priority is to add the irrigation and major plantings to the informal nature area above the middle school yard. They would also like to include any terracing that is necessary to for the vegetation and to create maintenance trails though this space.

3. Alice Fong Yu School’s third priority is to develop the imaginative play space in the elementary school yard, next to the play structure. This would include removing the asphalt, creating the perimeter seat wall, planting the large shade tree, adding major shrubs, installing irrigation for the plantings, and installing the open-sided play house.

4. The school’s fourth priority is to create the nature area that sits between the elementary and middle school yards, with the exception of the vista point/overlook. (The vista point feature is a lower priority.) This project would include adding artwork to the paved ramps, murals to the
walls, new shrubs, trees, and other vegetation to the planting strip, and extending the irrigation system for this zone as needed.

5. Their fifth priority is to install the rainwater collection cistern in the school garden, and to explore the possibility of adding additional rainwater collection features elsewhere on the school grounds. If the roof material is found to be appropriate, other locations might be considered in front of the middle school building, in the new social space planned there, or in the elementary school’s entry courtyard. The rainwater collection systems onsite may be accomplished with separate funds. (This is still to be determined.)

6. The school’s sixth priority is to develop the welcoming entrance on Funston Avenue. This project would include the Chinese-style entry arch above the stairway, and a large raised planting bed/container on the concrete shelf in the adjacent stairwell. The planter would also receive several large shrubs.

7. Alice Fong Yu School’s seventh priority is to work on murals onsite. These murals would include: the playground paintings on the asphalt in the elementary school yard; the wall murals in the elementary school yard, behind the play structure and on the nearby ramp wall; and the mural on the middle school’s amphitheater risers.

8. Their eighth priority is to extend greenery into the middle school yard, along the school building and the fence that divides the yard in half. Some of these plantings would be in-ground, and others would be in containers.

9. The ninth priority is to add the screen of living bamboo at the lower edge of the school garden.

PHASE TWO

This phase of the green schoolyard process includes projects that the school community plans to implement on their own in the coming years. Such projects would be implemented after the bond funds have been spent, using money raised by the school community—or using bond funds (and volunteer labor) if they still remain after items 1-9 above have been implemented. These projects may be implemented by the school community one per semester or year, or as funding and volunteer assistance allows. These projects are likely to occur within the next 5-10 years and could include:

10. Projects from the list above that were not completed during Phase One.

11. Other projects shown on the concept plan or developed by the community in the coming years, such as work on the building’s “green curtain,” continued work in the garden or nature area, etc.
NEXT STEPS

Now that the Alice Fong Yu School community has a completed concept plan, it is time to move on to the next phase of the implementation process. The Green Schoolyard Committee will work with Lori Shelton and Tamar Barlev (SFUSD Green Schoolyard Program), to write a RFP for Phase One of their green schoolyard project, listing the items the school plans to implement with their bond funds in order of priority. The Green Schoolyard Committee and principal will help to interview and select their landscape architect. Later, they will work with this person to create a more detailed, schematic plan for the project area and construction drawings for the portions of that plan that will be built by a professional contractor.

While working with the landscape architect, the school community will have an opportunity to decide which components they wish to undertake themselves (e.g. building planters, creating artwork, planting vegetation, etc.), and which components will need to be built by a professional contractor. When the landscape architect has completed his/her construction drawings and they have been approved by SFUSD, they will go out for bid to professional contractors. Once hired, the contractor will construct their portion of the project first, and the landscape architect will supervise their work. When they are finished and their work has been accepted by SFUSD, the school community will add their own plantings and other smaller features, as desired.
ALICE FONG YU ALTERNATIVE SCHOOL
GOALS & IDEAS FOR THE GREEN SCHOOLYARD

The ideas below were generated by the Alice Fong Yu School community as they participated in a green schoolyard project kick-off meeting led by Bay Tree Design, inc. on October 6, 2009. The meeting was attended by the full school faculty, plus approximately five parents, the school’s Principal Liana Szeto, SFUSD’s Green Schoolyard Project Manager Lori Shelton, Assistant Project Manager Tamar Cooper, Environmental Planner Sharon Danks (Principal, Bay Tree Design, inc.), and Arden Bucklin-Sporer and Rachel Pringle of the San Francisco Green Schoolyard Alliance (SFGSA).

After viewing a green schoolyard slideshow presentation given by Sharon Danks, the group brainstormed their ideas. When the brainstorming session was complete, the teachers and parents were each given eight stickers to vote for the items that were their highest priorities. The ideas generated during this meeting are listed below, along with numbers that indicate the quantity of “votes” each item received. This voting process was intended to help determine the group’s initial priorities.

**LEARNING: Educational Goals & Curriculum Connections to the Schoolyard**

- Outdoor oven (brick or earth) (6)
- Greenhouse (5)
- Human sundial (5)
- Weather station (4)
- Tea house (3)
- Reading area (2)
- Mortar / pestle for grinding (2)
- Feature to play with light and split colors (prism, glass, etc) (1)

**NATURE: Schoolyard Ecology**

- Rainwater catchment (15)
- Butterfly gardens (10)
- Fog catcher (7)
- Koi pond (with fish, plants, etc) (7)
- Renewable energy / windmill (6)
- Permeable paving (5)
- Living roof on garden shed (4)
- Grass (native) area (4)
- Chicken coop (2)
- Fruit trees (2)
- “Great Wall” of recycled products (2)
- Develop green roof on main building (1)

**PLAY: Schoolyard Recreation**

- Water painting wall (14)
- Tree house (12)
- Fitness course / trail (12)
- Wooden blocks / tree slices to play with (1)

**COMFORT: Schoolyard Comfort, Microclimates & Seating**

- Green curtain / vertical garden (16)
- Shading in the yard (16)
- Meditation corner (4)

**BEAUTY: Improve Aesthetics & Enjoyment**

- Flowing water / watershed art piece (12)
- Bamboo (living) garden (8)
- Calming bell to ring (3)
- Fragrance trees (2)
- Kinetic sculpture (also Learning) (1)
- Recycled material artwork

**SCHOOLYARD CONFIGURATION: Ideas about the Use of Space**

- Outdoor seating big and small (9)
- Trail (nature) (9)
- Bridge theme (6)
## 2006 PROPOSITION A BOND GREEN SCHOOLYARD PROJECT

### SUMMARY – ALICE FONG YU SCHOOL’S DESIGN PRIORITIES

The summary list below reflects the results of parent and teacher input at our green schoolyard brainstorming session in October 2009. Each participant received 8 votes to split among the list of choices brainstormed at the meetings. Below are the ideas in ranked order.

At the design workshop, participants were asked to place ALL of the items that received at least 9 votes (contained in the red box), into their draft design for the schoolyard. They were also given the choice to include any of the other ideas below, and to add new ideas that they thought of during the workshop.

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ALICE FONG YU ALTERNATIVE SCHOOL – SITE WALK MAPS
APPENDIX B

ALICE FONG YU ALTERNATIVE SCHOOL – SITE WALK MAPS
ALICE FONG YU SCHOOL – PHOTOGRAPHS OF THE SCHOOL GROUNDS
FALL 2009

ELEMENTARY SCHOOL YARD

Photographs by Bay Tree Design, inc.
APPENDIX C

ALICE FONG YU SCHOOL – PHOTOGRAPHS OF THE SCHOOL GROUNDS
FALL 2009

PLANTING STRIP BETWEEN ELEMENTARY & MIDDLE SCHOOL YARDS

MIDDLE SCHOOL YARD
ALICE FONG YU SCHOOL – PHOTOS OF THE SCHOOL GROUNDS
FALL 2009

HILLSIDE ABOVE MIDDLE SCHOOL YARD

EXISTING SCHOOL GARDEN
APPENDIX C

ALICE FONG YU SCHOOL – PHOTOGRAPHS OF THE SCHOOL GROUNDS
FALL 2009

FRONT OF SCHOOL ALONG 12TH AVENUE

SCHOOL ENTRANCE ON FUNSTON AVENUE
ALICE FONG YU SCHOOL – MIDDLE SCHOOL STUDENTS’ DESIGN IDEAS FOR THE SCHOOL GROUNDS

Photographs by Bay Tree Design, inc.
ALICE FONG YU SCHOOL – MIDDLE SCHOOL STUDENTS’ DESIGN IDEAS FOR THE SCHOOL GROUNDS

Photographs by Bay Tree Design, inc.
APPENDIX D

ALICE FONG YU SCHOOL – MIDDLE SCHOOL STUDENTS’ DESIGN IDEAS FOR THE SCHOOL GROUNDS
ALICE FONG YU ALTERNATIVE SCHOOL
GREEN SCHOOLYARD - PROJECT SUMMARY

2006 PROPOSITION A BOND

In September 2009, the Alice Fong Yu Alternative School community began a participatory schoolyard design process as part of the SFUSD 2006 Proposition A Bond’s Green Schoolyard Program. The overall goal of this bond-funded project is to enrich the schoolyard with additional recreational, educational, and ecological features that will make it a more exciting, beautiful, interesting and comfortable environment for students and adults.

The 2006 Proposition A Bond program is contributing $150,000 to “green” Alice Fong Yu School’s grounds. The conceptual plan for this renovation was developed using a participatory design process that included the school’s teachers, Parent Association, and students, assisted by Bay Tree Design, Inc.

This initial planning phase, completed in Spring 2010, resulted in a concept plan that is intended to guide the future development of the school’s gardening efforts, outdoor classroom spaces, and play areas. In the project’s next phase, a landscape architect selected by the school will complete the design details and construction documents. The project will be built by contractors, with the help of the school community.

PROJECT MISSION STATEMENT

The Green Schoolyard Project at Alice Fong Yu School seeks to use outdoor space creatively to develop a verdant, sustainable environment, while fostering a better appreciation of the natural world and stewardship of our school site. We would like our schoolyard to include more green spaces for the children to explore, rest, and play in creatively; outdoor learning opportunities; and places for the entire school community to enjoy.

The Green Schoolyard Committee invites you to join this exciting project!

OVERALL GOALS & KEY PROJECT IDEAS

Goal #1: Improve schoolyard comfort & aesthetics
- Make the schoolyard more comfortable by adding shade, seating, and places to relax
- Improve the thermal comfort of indoor classrooms by planting a “green curtain” of vines along the school building’s wall in sunny locations, to partly shade the windows, and soften the light inside
- Add a bamboo grove to screen the garden’s edge
- Include a flowing water/watershed art piece

Goal #2: Diversify play opportunities in the schoolyard
- Include a variety of active play and PE options, including a nature trail that can be used for fitness
- Create places for imaginative and nature play (e.g. playhouse/tree house, boulders, water painting, etc.)

Goal #3: Improve schoolyard ecology
- Install a stormwater catchment system to help irrigate garden plants; include fog collection if feasible
- Create butterfly and pollinator gardens
- Use trees and plants native to California to conserve water, attract wildlife, and reflect local ecology
- Include renewable energy systems onsite

Goal #4: Connect the curricula to the schoolyard
- Include Chinese cultural themes in schoolyard artwork, signage, learning and play spaces, etc.
- Paint a “human sundial” on the playground
- Expand the edible garden to include a new greenhouse, more fruit trees, an outdoor oven, etc.
The Alice Fong Yu School community began a participatory schoolyard design process in September 2009 as part of the SFUSD 2006 Proposition A Bond’s Green Schoolyard Program. The goal of the green schoolyard program is to enrich the school’s campus with additional recreational, educational, and ecological features that will make it a more exciting, beautiful, interesting and comfortable environment for students and adults.

1. PROJECT KICK-OFF

The Alice Fong Yu Green Schoolyard Project began with a meeting with teachers and Parent Association (PA) members to discuss the idea of enhancing the schoolyard. Environmental planner Sharon Danks of Bay Tree Design, inc. led this meeting in October 2009, and presented a schoolyard ecology slideshow to open the conversation and brainstorming session. The school community used this meeting to articulate their goals for the schoolyard’s future development and created a list of initial project ideas to be incorporated into the yard.

2. SCHOOLYARD RESEARCH

In October 2009, the Alice Fong Yu Green Schoolyard Committee worked with Bay Tree Design to examine the existing physical conditions and uses of the school site. Some of the issues discussed included: sun and shade patterns, pedestrian and vehicle circulation, ecology, existing uses for each area of the yard, and opportunities for improvement. The information gathered during this site walk (shown, left) was mapped so that it could be discussed in more detail at the design workshop.

3. DESIGN WORKSHOPS

The green schoolyard committee, and other interested teachers and PA members, met again in November 2009 to participate in a design workshop organized by Bay Tree Design. At the workshop, the participants worked in three groups to create designs for the schoolyard. Each group developed their concepts based on the earlier site research and the goals that sprang from the kick-off meeting. The workshop concluded with a presentation from each group about their ideas. Later in the month, Danks led a second design workshop for a group of 40 middle school students. The students watched a similar slideshow, drew their ideas for the yard, and presented them to their peers.

4. CONCEPT PLAN

After the design workshops, Bay Tree Design reviewed the school community’s ideas and combined them to create a concept plan, which was reviewed by the principal, the Alice Fong Yu Green Schoolyard Committee, teachers, families, and students. The schoolyard plan (above) illustrates the school’s consensus about the green schoolyard’s general direction and design in the years to come, and describes the intended uses for each area. The school community has selected a portion of this plan to implement with their bond funds, and will pick a landscape architect to help them develop that portion of the design in more detail.
This Agreement is dated for convenience **XXXXX XX, 2011,** and is entered into between **XXX LANDSCAPE ARCHITECTS** (hereinafter “Consultant”) and the San Francisco Unified School District (hereinafter “District”).

**RECITALS**

WHEREAS, The Consultant has experience and expertise in landscape design services;

WHEREAS, The District desires that the Consultant render professional services to provide **Green Schoolyard Program design for XXX school** related to the passage of the District’s Proposition A 2006 Bond Program,

WHEREAS, Consultant represents itself able and, for a consideration, willing to perform the services required by the District;

NOW, THEREFORE, for and in consideration of the promises hereinafter contained, the parties agree as follows:

1. **AVAILABILITY OF FUNDS AND BUDGET AND FISCAL PROVISION AND TERMINATION IN THE EVENT OF NON-APPROPRIATION**

   a. This Agreement is subject to the budget and fiscal policies, regulations, and practices of the District.

   b. The amount of the District's obligation hereunder shall not at any time exceed the amount herein stated.

   c. The District has no obligation to renew this Agreement after expiration of its term. If funds are appropriated for a portion of a fiscal year, this Agreement will terminate, without penalty, at the end of the term for which funds are appropriated.

   d. This section controls against any and all other provisions of this Agreement.

2. **TERM OF THE AGREEMENT**

   The Agreement shall become effective beginning **XXXXX XX, 2011** and shall terminate on or before **XXXXX XX, 2013**.

3. **SERVICES CONSULTANT AGREES TO PERFORM** the consultant will perform all services as described in its proposal dated **XXXXX XX, 2011** attached to this Agreement.
4. COMPENSATION

The Consultant shall be paid as per its proposal dated XXXX XX, 2011 attached to this Agreement, for services rendered. Requests for compensation shall be monthly, complete with a breakdown of charges and receipts as applicable. Payments shall be made in a reasonable time upon approval that services have been rendered in a professional and timely manner as set forth in Section 3 of this Agreement. The amount of money to be paid to the Consultant under this Agreement shall not exceed XXXX dollars (US $XXXXXX.XX). If the scope of work described herein is increased, the Agreement amount may also be increased provided that there is a prior written modification to the Agreement and a Board Resolution authorizing said increases. It shall be the responsibility of the Consultant to ensure that the total approved amount of the Agreement is not exceeded. Any work performed in excess of said amount shall not be compensated.

Contractor’s overhead and profit on change orders resulting from errors and omissions on the part of the Consultant shall be deducted from the Consultant’s fees.

5. TERMINATION

a. It is expressly understood and agreed that in the event the Consultant or the District fails to perform its obligations under this Agreement, this Agreement shall be terminated and all the Consultant's and District's rights hereunder ended. Termination shall be upon ten (10) days written notice to the defaulting party, and no work will be undertaken by Consultant after receipt of the notice. In the event this Agreement is terminated by the District pursuant to this paragraph; the Consultant shall be paid for services performed up to the date of termination.

b. It is further understood and agreed that the District may terminate this Agreement for the District's convenience and without cause at any time by giving the Consultant thirty (30) days written notice of such termination. In such an instance, the Consultant shall be entitled to compensation for services performed up to the effective date of termination.

c. Upon receipt of written notice that this Agreement is terminated, the Consultant will submit an invoice to the District for an amount that represents the value of services actually performed up to the date of termination for which the Consultant has not previously been compensated as per paragraph 4 above. Upon approval and payment of this invoice by the District, the District shall be under no further obligation to the Consultant, monetarily or otherwise.

6. INDEPENDENT CONTRACTOR

The Consultant shall be deemed at all times to be an independent contractor and shall be wholly responsible for the manner in which it performs the services required of him pursuant to the terms of this Agreement. The Consultant shall be liable for any act or acts of its own, or its agents or employees, and nothing contained herein shall be construed as creating the relationship of employer and employee
between the District and the Consultant or its agents and employees. The Consultant shall also complete and file with the District the attached W-9 form.

7. MODIFICATION OF AGREEMENT

The parties may amend this Agreement in writing by mutual consent. Changes, including any increase or decrease in the amount of the Consultant’s compensation, shall only be effective upon the execution of a duly authorized written amendment to this Agreement.

8. SUBCONTRACTING

The Consultant is prohibited from subcontracting this Agreement or any services provided pursuant to this Agreement unless such subcontracting is agreed to in writing and executed in the same manner as this Agreement. No party on the basis of this Agreement shall in any way contract on behalf of or in the name of the other party of this Agreement, and violation of this provision shall confer no rights on any party and shall be void.

9. ADMINISTRATIVE REMEDY FOR AGREEMENT INTERPRETATION

Should any question arise as to the meaning and intent of the Agreement, the matter shall, prior to any action or resort to any other legal remedy, be referred to the Superintendent who shall decide the true meaning and intent of the Agreement.

10. BANKRUPTCY

In the event that either party shall cease conducting business in the normal course, become insolvent, make a general assignment for the benefit of creditors, suffer or permit the appointment of a receiver for its business or assets or shall avail itself of, or become subject to, any proceeding under the Federal Bankruptcy Act or any other statute of any state relating to insolvency or the protection of rights of creditors, then at the option of the other party, this Agreement shall terminate and be of no further force and effect, and any property or rights of such other party, tangible or intangible, shall forthwith be returned to it.

11. CONSULTANT’S DEFAULT

Failure or refusal of the Consultant to perform or do any act herein required shall constitute default. In the event of any default, in addition to any other remedy available to the District, the District may terminate this Agreement pursuant to the terms of Section 6a herein. Such a termination shall not waive any other legal remedies available to the District.
12.  **CONFLICT OF INTEREST**

Consultant understands and certifies that it does not know of any facts which constitute a violation of the California Political Reform Act, which states in part: "[N]o public official at any level of state or local government shall make, participate in making or in any way attempt to use its official position to influence a governmental decision in which he/she knows or has reason to know he/she has a financial interest." (California Government Code Section 87100 et seq.)

Consultant also hereby certifies that no current Board member or employee of the San Francisco Unified School District, and no one who has been a Board member or an employee of the District within the last two years, has participated in bidding, selling or promoting this Agreement. Furthermore, Consultant certifies that no such current or former Board member or employee will derive any compensation, directly or indirectly, from this Agreement. Consultant understands that any violation of this provision of the Agreement shall make the Agreement voidable by the District.

13.  **SEVERABILITY**

If any term or provision of this Agreement shall be found illegal or unenforceable, this Agreement shall remain in full force and effect and such term or provision shall be deemed stricken.

14.  **AGREEMENT MADE IN CALIFORNIA**

This Agreement shall be deemed to be executed in, and shall be construed in accordance with, the laws of the State of California.

15.  **INDEMNIFICATION**

A. With respect to professional services to be provided under this Agreement, the Consultant shall indemnify and hold harmless the San Francisco Unified School District, agents, and employees from and against any and all actions, claims, damages and losses, including attorney’s fees that may arise out of Consultant’s negligent acts, errors, or omissions caused by the Consultant.

B. With respect to claims arising under Consultant’s general liability coverage, the Consultant shall indemnify and hold harmless the San Francisco Unified School District, it’s agents, and employees from and against any actions, claims, damages or loss, including attorney’s fees that may arise out of Consultant’s activities in the performance of it’s services under this Agreement.

C. The Consultant shall indemnify and save harmless the District, it’s officers, agents, employees and members of the Board of Education from any claims, loss, damage, injury and liability of every kind, nature and description that may at any times arise from any infringement of any patent right, copyright, trade secret or any other proprietary right or trademark by any of Consultant’s officers, employees and/or agents by use or articles or services in the performance of this Agreement.
16. **INSURANCE**

a. The Consultant shall procure and maintain during the term of this Agreement the following insurance:

   (1) Comprehensive General Liability Insurance with limits not less than $1,000,000.00 (one million dollars) each occurrence combined Single Limit for Bodily Injury and Property Damage.

   (2) Comprehensive or Business Automobile Liability Insurance with limits not less than $1,000,000.00 (one million dollars) each occurrence Combined Single Limit for Bodily Injury and Property Damage, including coverages for Owned, Non-owned and Hired Vehicles, as applicable.

   (3) Workers' Compensation Insurance, with Employer's Liability limits not less than $1,000,000.00 (one million dollars) each accident.

   (4) Professional Liability (E & O) Insurance with limits not less than $1,000,000.00 (one million dollars) each occurrence.

   If any policies are written on a claims-made form, Consultant agrees to maintain such insurance continuously in effect for three years following completion of this Agreement or extend the period for reporting claims for three years following the completion of this Agreement, such that occurrences which take place during the Agreement period shall be insured for three years following completion of the Agreement.

b. The General Liability and Comprehensive Automobile Liability Insurance shall be endorsed to provide the following:

   (1) Name as additional insureds the San Francisco Unified School District, its Board, officers and employees.

   (2) That such policies are primary insurance to any other insurance available to the additional insureds, with respect to any claims arising out of this Agreement and that insurances apply separately to each insured against whom claim is made or suit is brought.

   (3) Thirty (30) days advance written notice to the District of cancellation, non-renewal or reduction in coverage.

The Consultant shall provide the District with the appropriate certificate(s) of insurance prior to commencing performance. The Consultant shall also be obligated to notify the District in writing at least 30 (thirty) days in advance of any cancellation, non-renewal or reduction of any of its insurance policies required under this Agreement. Consultant also understands and agrees that the District may withhold payment for services performed for any violations of the insurance provisions of this Agreement.
17. **NON-DISCRIMINATION**

Consultant agrees that it shall not discriminate on the basis of sex, race, religious creed, national origin, age, marital status, sexual orientation, gender identity, AIDS/ARC/HIV status, or disability, in its performance under this Agreement. Contractor acknowledges that, pursuant to the Americans with Disabilities Act (ADA), programs, services, and other activities provided by a public entity to the public, whether directly or through a contractor, must be accessible to persons with disabilities. Contractor agrees not to discriminate against persons with disabilities in the provision of services, products, benefits, or activities provided in the Contract of Agreement, and further agrees that any violation of this prohibition on the part of the Contractor shall constitute a material breach of the Contract or Agreement.

18. **CRIMINAL BACKGROUND CHECKS**

Consultant agrees to comply with Education Code Section 45125.1, et seq. concerning fingerprinting employees and conducting criminal background checks through the California Department of Justice. The District is extending this requirement to all types of consultants if they are deemed to have more than limited contact with District students. The consultant shall assume all expenses associated with these background checks and shall immediately remove any employee or agent from District property who has been arrested or convicted of any serious or violent felony, as defined by the California Penal Code Sections 667.5 and 1192.7.

The District shall be the final arbiter of what constitutes "limited contact." The District may also, in its sole discretion, waive these provisions if it determines that emergency or exceptional circumstances exist which threaten student or staff safety if the work is delayed pending clearance. The Consultant's violation of this section shall constitute a default under Section 12 herein.

19. **PROPRIETARY INFORMATION OF DISTRICT**

The Consultant understands and agrees that, in its performance under this Agreement or in contemplation thereof, the Consultant may have access to private or confidential information which may be owned or controlled by the District and that such information may contain proprietary details, the disclosure of which to third parties will be damaging to the District, its employees or students. The Consultant also understands and agrees that the disclosure of such information may violate state and/or federal law and may subject the Consultant to civil liability. Consequently, Consultant agrees that all information disclosed by the District to the Consultant shall be held in confidence and used only in performance of the Agreement. The Consultant shall exercise the same standard of care to protect such information as is used to protect its own proprietary data.
20. **NOTICES TO THE PARTIES**

All notices to be given by the parties hereto shall be in writing and served by depositing same in the United States Post Office, postage prepaid and registered as follows:

TO THE DISTRICT: San Francisco Unified School District

ATTN: XXXXX

135 Van Ness Avenue Room 207
San Francisco, CA 94102

TO THE CONSULTANT: XXX LANDSCAPE ARCHITECTS

XXXX Street
XXXXX, CA 9XXXX

(XXX) XXX-XXXX

21. **WAIVER**

Either party's failure at any time to enforce any default or right reserved to it, or to require performance of any of the Agreement's terms, covenants, or provisions by the other party at the time designated, shall not be a waiver of any such default or right to which the party is entitled, nor shall it in any way affect the right of the party to enforce such provisions thereafter.

22. **ASSIGNMENT**

It is understood and agreed that the services to be performed by the Consultant are personal in character and neither this Agreement nor any duties or obligations hereunder shall be assigned or delegated by the Consultant without the prior written consent of the District.

23. **OWNERSHIP OF THE RESULTS**

Any interest of the Consultant in studies, reports, memoranda, computation sheets or other documents prepared by the Consultant in connection with services to be performed under this Agreement shall become the property of and will be transmitted to the District. However, the Consultant may retain and use copies for reference and as documentation of its experience and capabilities, but only to the extent Consultant's use does not violate Section 18 of this Agreement.

24. **AUDIT AND INSPECTION OF RECORDS**

The Consultant agrees to maintain and make available to the District accurate books and accounting records relative to its activities under this Agreement. The Consultant will permit the District
to audit, examine and make excerpts and transcripts from such books and records, and to make audits of all invoices, materials, payrolls, records or personnel and other data related to all other matters covered by this Agreement, whether funded in whole or in part under this Agreement. The Consultant shall maintain such data and records in an accessible location and condition for a period of not less than three years after a final payment under this Agreement or until after final audit has been completed, whichever is later.

25. **SECTION HEADINGS**
   The section headings contained herein are for convenience in reference and are not intended to define the scope of any provision of this Agreement.

26. **ENTIRE AGREEMENT**
   The entire Agreement between the parties is included herein and no warranties, expressed or implied, representations, promises, or statements have been made by either party unless endorsed herein in writing, and no change or waiver of any provision hereof shall be valid unless made in writing and executed in the same manner as this Agreement.

   IN WITNESS WHEREOF the parties hereto have executed this Agreement the year and date first above written.

Resolution #: **XXX-XXXX**

_________________________________   SAN FRANCISCO UNIFIED SCHOOL DISTRICT

CONSULTANT

_________________________________

By:_________________________________

Joseph Grazioli
Chief Financial Officer

_________________________________

David Goldin
Chief Facilities Officer

APPROVED AS TO FORM:

BY:_________________________________

Legal Counsel, SFUSD
San Francisco Unified School District  
Consultant/Independent Contractor Agreement  
Criminal Background Check

<table>
<thead>
<tr>
<th>Name of Independent Consultant/Contractor:</th>
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<tbody>
<tr>
<td>Services performing under the Agreement:</td>
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<tr>
<td>Schools/Locations where services are being performed:</td>
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<tr>
<td>Total amount to be paid by the District under this Agreement:</td>
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<tr>
<td>Term of Agreement:</td>
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</table>

**Check the applicable box and fill in any blanks.**

1. I certify that none of my employees will have more than limited contact (as defined by the District) with District students during the term of the Agreement

2A. The following employees will have more than limited contact (as defined by the District) with District students during the term of the Agreement (attach and sign additional pages, as needed):

   |   |
   |   |
   |   |

2B. I certify that the employees noted in 2A above have been fingerprinted under procedures established by the California Department of Justice, and the results of those fingerprints reveal that none of these employees have been arrested or convicted of a serious or violent felony, as defined by the California Penal Code.

**Certification by Contractor/Consultant**

"I certify that the information provided herein is true and accurate. I further acknowledge that during the term of my Agreement with the District, if I learn of additional information which differs from the responses provided above, I promise to forward this additional information to the District immediately."

<table>
<thead>
<tr>
<th>Consultant's Signature</th>
<th>Date</th>
<th>Administrator's Signature</th>
<th>Date</th>
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<tr>
<td></td>
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<td>David Goldin, Chief Facilities Officer</td>
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</table>

Printed name of Consultant Printed name of Administrator
California Disabled Veteran Business Enterprise Program Requirements
(REV. 9-15-03)

AUTHORITY. The Disabled Veteran Business Enterprise (DVBE) Participation Goal Program for state contracts is established in Public Contract Code (PCC), Section 10115 et seq., Military and Veterans Code, Section 999 et seq. and California Code of Regulations, Title 2 (2CCR), Section 1896.60 et seq.

The minimum DVBE participation percentage is 3% for this solicitation unless another percentage is specified in the solicitation.

INTRODUCTION. The bidder must document at least one of the options (A, B or C) in this document to comply with this solicitation’s DVBE program requirements. Bids or proposals (hereafter called “bids”) that fail to fully document one of the DVBE program requirements options shall be considered non-responsive and ineligible for award.

All information submitted by the intended awardee to comply with this solicitation’s DVBE requirements will be verified by the State. If evidence of an alleged violation is found during the verification process, the State shall initiate an investigation with this information in accordance with the requirements of the Public Contract Code, Section 10115, et seq. and the Military and Veterans Code, Section 999 et seq. and follow the investigatory procedures required by the California Code of Regulations, Section 1896.80.

Only State of California, Office of Small Business and DVBE Certification certified DVBEs who perform a commercially useful function relevant to this solicitation may be used to satisfy the DVBE program requirements. The criteria for performing a commercially useful function are contained on page 5, Resources & Information and California Code of Regulations, Title 2, Section 1896.61(l). Verify each DVBE subcontractor’s/supplier’s certification with the Office of Small Business and DVBE Certification Section to ensure DVBE eligibility.

<table>
<thead>
<tr>
<th>To meet the DVBE program requirements, bidders must complete and fully document at least one of the following compliance options:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Option A - Commitment to full DVBE participation</strong> - For a bidder who is a DVBE or who is able to meet the commitment to use identified DVBE(s) to fulfill the full DVBE participation goal.</td>
</tr>
<tr>
<td><strong>Option B - Good Faith Effort</strong> - For a bidder documenting its completed effort, made prior to the bid due date, to obtain DVBE participation that may result in partial or no DVBE participation.</td>
</tr>
<tr>
<td><strong>Option C - Business Utilization Plan</strong> - For a bidder using an annual plan (subject to approval) to satisfy DVBE participation requirements. Applies only to solicitations for goods and information technology.</td>
</tr>
</tbody>
</table>

PLEASE READ ALL INSTRUCTIONS CAREFULLY. These instructions contain information about the DVBE program requirements, bidder responsibilities, and requirements for performing and documenting each of the three available options as detailed below. Bidders are responsible for thorough review and compliance with these instructions. Document your option selection on the attached STD Form 840, Documentation of Disabled Veteran Business Enterprise Program Requirements.
**OPTION A – COMMITMENT** -- Commit to meet or exceed the DVBE participation requirement in this solicitation by either Method A1 or A2. Bidders must document DVBE participation commitment by completing and submitting the attached STD 840. Failure to complete and submit STD 840 (Side 1) as instructed shall render your bid non-responsive.

The bidder must provide, prior to contract award, a written agreement signed by the bidder and each proposed DVBE subcontractor. The written agreement will include the DVBE scope of work, work to be performed by the DVBE, term of intended subcontract with the DVBE, anticipated dates the DVBE will perform required work, rate and conditions of payment, total amount of contract to be paid to the DVBE, and the percentage of the entire contract that will be awarded to the DVBE, with each DVBE subcontractor. If this information is contained in the bidder’s DVBE written agreement of intent, the agreement may be attached to the STD 840. If further verification is necessary, the state will obtain additional information to verify the above requirements.

**Method A1. Certified DVBE bidder:**

a. Commit to performing at least 3% of the contract bid amount (unless otherwise specified) with your firm or in combination with other DVBE(s).

b. Document DVBE participation on STD 840 (Side 1) and attach a copy of all applicable certifications.

c. A DVBE bidder working in combination with other DVBEs shall be requested to submit proof of its commitment by submitting a written agreement with the DVBE(s) identified in its bid’s STD 840. When requested, the written agreement must be submitted to the address or facsimile number specified and within the timeframe identified in the notification. Failure to submit the requested written agreement as specified may be grounds for bid rejection.

**Method A2. Non-DVBE bidder:**

a. Commit to using certified DVBE(s) for at least 3% (unless otherwise specified) of the bid amount.

b. When a bidder commits to less than the required 3% DVBE participation or its commitment may fall below 3% if specific line items/groups are not selected for award, then Option B, Good Faith Effort must be completed in addition to Option A, Commitment.

c. Document DVBE participation on STD 840 (Side 1) and attach a copy of the DVBE’s certification.

d. Prior to contract award, a bidder is to submit proof of their commitment by submitting a written agreement with the DVBE(s) identified in its bid’s STD 840. The awarding department contracting official named in this solicitation will contact each listed DVBE, by mail, fax or telephone, for verification of the bidder’s submitted DVBE information. The written agreement must be submitted to the address or facsimile number specified and within the timeframe identified in the notification. Failure to submit the written agreement as specified may be grounds for bid rejection.
OPTION B – GOOD FAITH EFFORT (GFE) performance and documentation requirements must be completely satisfied prior to bid submission if you are unable to obtain and commit to the full DVBE participation percentage goal (Option A) and do not exercise Option C. Perform and document the following Steps 1 through 5 on both sides of the attached STD 840 form. Failure to perform and document GFE Steps 1 through 5 as instructed, which includes properly completing and submitting both sides of STD 840, shall result in your bid being deemed non-responsive. Step 3, Advertisement, is required unless specifically waived for this solicitation due to time limits imposed by the awarding department.

Step 1 Awarding Department - Contact the department’s contracting official named in this solicitation to identify interested DVBEs. You must fully document this contact and describe the results on STD 840 (Side 2).

Step 2 Other State and Federal Agencies, and Local Organizations

STATE Contact the Department of General Services, Procurement Division’s (DGS-PD) Office of Small Business and DVBE Certification (OSDC) to obtain a list of certified DVBEs by telephone at (916) 322-5060 for the 24-hour automated telephone system or (916) 375-4940 for the receptionist during normal business hours. This information can also be obtained by searching the online database at http://www.pd.dgs.ca.gov/smbus. Begin by selecting Certified Firm Inquiry Services, then search by using either the Keyword Search or the Standard Query options. You must fully document this contact and describe the results on STD 840 (Side 2).

FEDERAL Search the U.S. Small Business Administration’s (SBA) online database (Pro-Net) at http://www.pro-net.sba.gov to identify potential DVBEs. Select these minimum options in the following sequence: select Search Database; select CA under “State”; select Service Disabled Veteran under “Other Ownership Data”; and “Search Using These Criteria” at the page bottom. The database takes a few moments to query, and then your list will appear on your screen. You may select other criteria to focus your search. You must fully document this contact and describe the results on STD 840 (Side 2).

LOCAL Contact at least one local DVBE organization to identify DVBEs. For a list of local DVBE organizations, please refer to the DVBE Resource Packet that may be accessed online (http://www.pd.dgs.ca.gov/smbus - select “DVBE Resource Packet”) or obtain a hardcopy by requesting it from DGS-PD Office of Small Business and DVBE Outreach and Education (see the Resources & Information page). You must fully document your contact with local DVBE organizations and describe the results on STD 840 (Side 2).

Step 3 Advertisements are mandatory unless waived by the awarding department.

CONTENT REQUIREMENTS: Include all of the following in your advertisement(s): (1) company name; (2) contact name; (3) address; (4) telephone and facsimile (if applicable) numbers; (5) e-mail address (if applicable); (6) the state’s solicitation number(s); (7) goods and/or services for which the state is soliciting; (8) the location of the work to be performed; and (9) the State’s bid(s) due date and/or your due date for receiving DVBE responses.

HOW MANY & WHERE TO PUBLISH: Bidders must publish two (2) ads, one (1) each in a trade paper and a DVBE focus paper unless the paper is dual purpose (fulfilling both trade and focus requirements as defined in California Code of Regulations, Title 2, Section 1896.61(k)), in which case one (1) ad is acceptable. Please see the DVBE Resource Packet for a list of acceptable publications.

WHEN: Ads must be published after the solicitation’s release date and at least 14 days prior to the bid due date, unless a different time period is expressly established in this solicitation.

DOCUMENT & SUBMIT: On STD 840 (Side 2), document the publication name(s) in which you published advertisement(s), the contact name and phone number, and date of publication. Include a copy(ies) of the advertisement(s) with your bid.
Step 4 Invitations to Participate

**WHO:** Invite (solicit) DVBEs who can provide relevant goods and/or services to this solicitation to subcontract with you. Conducting Steps 1 through 3 produces a list of DVBEs from which you may choose potential DVBE subcontractors/suppliers to contact. Bidders are advised to contact as many DVBEs (who provide relevant goods and/or services in the applicable location(s)) as possible. Non-California-certified DVBEs are not eligible -- please refer those DVBEs to the OSDC to learn about certification (see the Resources & Information page for contact information).

**FOR WHAT:** Solicit DVBEs for goods and/or services relevant to the state’s solicitation. If you are unable to identify specific portion(s) of the proposed contract to subcontract, the state encourages bidders to avoid making a predetermination that no DVBEs are able to perform without first contacting and soliciting participation from them. This allows DVBEs to respond whether they can or cannot provide any goods or services related to the solicitation, and provides a bidder with responses for consideration.

**HOW TO INVITE & CONTENT REQUIREMENTS:** Written invitations are required. At a minimum, invitations must contain all of the following: (1) company name; (2) contact name; (3) address; (4) phone and facsimile (if applicable) numbers; (5) return e-mail address (if applicable); (6) the state’s solicitation number; (7) goods and/or services for which the state is soliciting; (8) location of work; and (9) the State’s bid(s) due date and/or your due date for receiving DVBE responses.

**WHEN:** Provide DVBE’s with a reasonable time period to receive and respond to your invitation, and to be considered by you for participation as described in Step 5, prior to your bid submission.

**DOCUMENT & SUBMIT:** Bidders must document the completed contacts on STD 840 (Side 1), Section A. Attach additional copies of STD 840A as necessary to list your DVBE contacts. You are required to attach a copy of: (1) each invitation or offer sent by letter, fax or e-mail; and (2) confirmation of transmittal or delivery. Your bid shall be considered non-responsive if it fails to include copies of the written invitations and delivery confirmations.

Step 5 Consider all responding DVBEs for contract participation. Consideration must be based on business needs for the contract and the same evaluation criteria must be applied to each potential DVBE subcontractor/supplier offering the same goods and services. You must document on STD 840 (Side 1), Section A any firm(s) selected for participation; or if not selected, the reason for non-selection. Attach additional copies of STD 840A as necessary to list all of your DVBE contacts.

**OPTION C – THE DVBE BUSINESS UTILIZATION PLAN (BUP) option permits bidders to submit an approved DVBE BUP to satisfy DVBE participation solicitation requirements up to 3%.** **DVBE BUPs apply only to solicitations for goods and information technology (IT) goods and services.** DVBE BUPs are a company’s commitment to expend a minimum of 3% of its total statewide contract dollars with DVBEs -- this percentage is based on all of its contracts in the State, not just those with the State. DVBE BUPs must be submitted to and approved by the DGS-PD prior to the bid due date. Please call the DGS-PD, Office of Small Business and DVBE Outreach and Education for assistance. Bidders choosing this option must properly complete and submit STD 840 (Side 1) and include a copy of its approval letter with the bid; failure to submit these documents shall render your bid non-responsive.
RESOURCES AND INFORMATION

For assistance in preparing a responsive participation document, **contact the contracting official at the awarding department for this solicitation.** In accordance with Public Contract Code Section 10115.2(b)(3), bidders must advertise in trade and focus publications unless the requirement is waived. The Department of General Services, Procurement Division (DGS-PD) publishes a list of trade and focus publications to assist bidders in meeting these contract requirements. To obtain this list, please contact the DGS-PD Office of Small Business and DVBE Outreach and Education and request the “DVBE Resource Packet.”

<table>
<thead>
<tr>
<th>U.S. Small Business Administration (SBA)</th>
<th>FOR: Service-Disabled Veteran-owned businesses in California</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet contact only – see instructions for website navigation</td>
<td>(Remember to verify each DVBE’s California certification.)</td>
</tr>
<tr>
<td>PRONET Database: <a href="http://www.pro-net.sba.gov">http://www.pro-net.sba.gov</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Local Organizations (see the DVBE Resource Packet available from DGS-PD DVBE Program Section listed below)</th>
<th>FOR: List of potential DVBE subcontractors</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>DGS-PD Office of Small Business and DVBE Certification (OSDC)</th>
<th>FOR: Directory of Certified DVBEs Certification Applications Certification Information Certification Status, Concerns</th>
</tr>
</thead>
<tbody>
<tr>
<td>707 Third Street, Room 400, West Sacramento, CA 95605</td>
<td></td>
</tr>
<tr>
<td>Website: <a href="http://www.pd.dgs.ca.gov/smbus">http://www.pd.dgs.ca.gov/smbus</a></td>
<td></td>
</tr>
<tr>
<td>24-hour automated information &amp; document requests: (916) 322-5060</td>
<td></td>
</tr>
<tr>
<td>Receptionist: (916) 375-4940</td>
<td></td>
</tr>
<tr>
<td>Fax: (916) 375-4950</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>707 Third Street, 2nd Floor, West Sacramento, CA 95605</td>
<td></td>
</tr>
<tr>
<td>Voice, 8 am—5 pm: (800) 559-5529</td>
<td></td>
</tr>
<tr>
<td>Fax: (916) 375-4597</td>
<td></td>
</tr>
</tbody>
</table>

**Advertisement Format Example**

This example offers a suggested format that includes required information outlined in Option B, Good Faith Effort, Step 3. You can substitute the applicable information for the bolded, italicized words.

DVBEs are invited to participate as a potential subcontractor/supplier to perform a commercially useful function specific to **DGS’ IFB No. 12345 for fencing materials in Chowchilla**.

**DVBE responses due to me 1/1/02; Bids due to the State 1/15/02.**

Contact: **ABC Company Jane Doe, General Manager**

123 Main Street, Sacramento, CA 95814

voice: 555/555-5555; fax: 555/555-5556

or e-mail: jane.doe@abcco.com

**Commercially Useful Function Definition**

California Code of Regulations, Title 2, § 1896.61(l):

The term “DVBE contractor, subcontractor or supplier” means any person or entity that satisfies the ownership (or management) and control requirements of Section 1896.61(f); is certified in accordance with Section 1896.70; and provides services or goods that contribute to the fulfillment of the contract requirements by performing a commercially useful function. A DVBE contractor, subcontractor or supplier is considered performing a commercially useful function when it meets the following criteria:

1. The business concern is responsible for the execution of a distinct element of the work of the contract; carrying out its obligation by actually performing, managing or supervising the work involved; and performing work that is normal for its business services and functions, and

2. The business concern is not further subcontracting a greater portion of the work than would be expected by normal industry practices.
**State of California – General Services Procurement Division**

**Documentation of Disabled Veteran Business Enterprise Program Requirements**


**Designation of Option**  
Check the appropriate box(es) to indicate the option(s) with which you choose to comply, complete the applicable sections and attach the required supporting documentation. You are advised to read all instructions carefully prior to completing this form. Remember that only California certified DVBEs who can provide related goods and/or services may be used to satisfy these program solicitation requirements.

- **OPTION A** – I commit to meeting the full DVBE contract participation requirement.  
  Complete STD 840, Section A.

- **OPTION B** – I performed and documented a Good Faith Effort (GFE) in an attempt to obtain DVBE participation.  
  Complete STD 840, Section A (for GFE Steps 4 & 5) and STD 840 (REVERSE), Section B (for GFE Steps 1–3).

- **OPTION C** – I submit a copy of my firm’s “Notice of Approved DVBE Business Utilization Plan.”

---

**A. Full information must be provided.**

**For contract participation commitment,** at least one DVBE must be listed. DVBEs must perform a commercially useful function. List the specific goods and/or services with the dollar and/or percentage value(s) that the DVBE(s) commit(s) to provide and the DVBE’s tier (prime contractor = 0, subcontractor to prime contractor = 1, subcontractor to Tier 1 subcontractor = 2, etc.). If both the estimated dollar amount and percentage are listed, the higher value supercedes. Attach additional pages to list all other DVBE subcontractors/suppliers (you may use STD 840A).

**During contract performance,** all requests for substituting named DVBEs must be made in accordance with the provisions of California Code of Regulations, Title 2, Section 1896.64(c).

**For Good Faith Effort (GFE),** use this section to document your first completed contacts with (Step 4), and consideration of (Step 5), relevant DVBEs. Business reasons for non-selection must be documented. Attach additional pages to list all other DVBE contacts (you may use STD 840A). Copies of all written invitations and delivery confirmations must also be attached and submitted with the bid.

<table>
<thead>
<tr>
<th>Date Contacted</th>
<th>DVBE Company Name (If you are the Prime and a DVBE enter your name, otherwise enter the solicited subcontractor.)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>DVBE Contact Name &amp; Reference # Telephone Number Fax Number E-mail (if available)</td>
</tr>
<tr>
<td></td>
<td>Street Address, City, State and Zip Code</td>
</tr>
<tr>
<td></td>
<td>□ Yes, I am, or I will subcontract with, the listed DVBE to provide the following goods and/or services: Estimated $ and/or % Tier</td>
</tr>
<tr>
<td></td>
<td>Specific Goods and/or Services</td>
</tr>
<tr>
<td></td>
<td>□ No, I am unable to subcontract with the DVBE for the following business reasons:</td>
</tr>
</tbody>
</table>

**BOTH SECTIONS MUST BE COMPLETED FOR GOOD FAITH EFFORT**

**AT LEAST ONE DVBE MUST BE NAMED FOR PARTICIPATION**

<table>
<thead>
<tr>
<th>Date Contacted</th>
<th>DVBE Company Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>DVBE Contact Name Telephone Number Fax Number E-mail (if available)</td>
</tr>
<tr>
<td></td>
<td>Street Address, City, State and Zip Code</td>
</tr>
<tr>
<td></td>
<td>□ Yes, I will subcontract with the listed DVBE to provide the following goods and/or services: Estimated $ and/or % Tier</td>
</tr>
<tr>
<td></td>
<td>Specific Goods and/or Services</td>
</tr>
<tr>
<td></td>
<td>□ No, I am unable to subcontract with the DVBE for the following business reasons:</td>
</tr>
</tbody>
</table>

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**ATTACH ADDITIONAL PAGES (OR USE STD 840A) TO LIST ALL OTHER DVBE CONTACTS**

Go to Side 2, Section B to continue Good Faith Effort documentation ☰
B. Documentation of Good Faith Effort Steps 1, 2 and 3—Remember to carefully read all instructions prior to completing this form. Please refer to the Resources & Information page for detailed contact information and a sample advertisement format.

**STEP 1. Contact the Awarding Department** (the contracting official, unless another contact is specified) to identify potential DVBE subcontractors/suppliers, and document this contact as required.

<table>
<thead>
<tr>
<th>Date</th>
<th>Contact Name</th>
<th>Telephone Number</th>
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</table>

Describe Result

**STEP 2. Contact all of the following and document your contacts as required:** Other state and federal agencies and local organizations to identify potential DVBE subcontractors/suppliers.

**Other State Agency** – Procurement Division, Office of Small Business and DVBE Certification (Certification Office)

<table>
<thead>
<tr>
<th>PHONE CONTACT OR ONLINE SEARCH</th>
<th>Date</th>
<th>Telephone Number</th>
<th>Contact Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>(916) 322-5060</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(916) 375-4940</td>
<td></td>
</tr>
</tbody>
</table>

☐ I contacted the Certification Office for a list of California certified DVBEs.

Describe Result

**Federal Agency** – U.S. Small Business Administration (SBA) online database

<table>
<thead>
<tr>
<th>Date</th>
<th>Internet Address</th>
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<tbody>
<tr>
<td></td>
<td><a href="http://www.pro-net.sba.gov">http://www.pro-net.sba.gov</a></td>
</tr>
</tbody>
</table>

☐ I searched the federal online database for California DVBEs.

Describe Result

**Local DVBE Organizations** – Contact at least one local DVBE organization—refer to the DVBE Resource Packet for a list of acceptable contacts. ([http://www.pd.dgs.ca.gov/smbus](http://www.pd.dgs.ca.gov/smbus) - select “DVBE Resource Packet”)

<table>
<thead>
<tr>
<th>Date</th>
<th>Organization Name</th>
<th>Contact Name</th>
<th>Telephone Number and/or Internet Address</th>
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<td>( ) <a href="http://www">http://www</a>.</td>
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</table>

Describe Result

**STEP 3. Publish advertisements:** Two (2) advertisements: One (1) ad in an accepted trade paper; and one (1) ad in an accepted DVBE focus paper (please see the DVBE Resource Packet for a list of all accepted publications); unless the paper is dual purpose (fulfilling both trade and focus requirements), in which case one (1) ad is acceptable. Document this step as required and remember to attach a copy of your advertisement(s).

**Focus Paper Name** (list full name)  
**Address**  
**Trade Paper Name** (list full name)  
**Address**

☐ I certify the ad was placed to reach both trade and focus audiences through this one publication.

**Trade and Focus Paper Name** (list full name)  
**Address**
### ADDITIONAL DISABLED VETERAN BUSINESS ENTERPRISE CONTACTS

This document may be used as a continuation from Section A, STD 840 (REV. 9-15-2003)

<table>
<thead>
<tr>
<th>Date Contacted</th>
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<th>DVBE Contact Name</th>
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<th>Fax Number</th>
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Street Address, City, State and Zip Code

- Yes, I will subcontract with the listed DVBE to provide the following goods and/or services:
  - Specific Goods and/or Services
  - Estimated $ and/or %
  - Tier

- No, I am unable to subcontract with the DVBE for the following business reasons:

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</table>

**OR**

**No, I am unable to subcontract with the DVBE for the following business reasons:**

Please do not submit this checklist with your bid. It is provided for your use only. Checking every box of your elected compliance option does not guarantee that your bid will be evaluated compliant.

☐ **OPTION A: COMMITMENT TO DVBE CONTRACT PARTICIPATION**

- STD 840 included with bid
- DVBE Written Agreement
- Designated the Commitment Option – Checked the first box
- Listed at least one California certified DVBE subcontractor
- Checked the box(es) for “Yes…”
- Listed specific goods and/or services DVBE(s) agrees to provide
- Proposed DVBE contract performance is a “commercially useful function” relevant to the contract
- Listed the estimated dollar amount and/or percentage of contract for the DVBE’s participation
- Proposed DVBE participation meets the 3% requirement (unless a different percentage is specified)
- Attached a copy of the DVBE’s certification letter from the Department of General Services

☐ **OPTION B: GOOD FAITH EFFORT (GFE)**

- STD 840 included with bid
- Designated the GFE Option – Checked the second box
- (Step 4) Listed all DVBEs contacted and invited to perform on the proposed contract
- Confirmed that listed DVBEs are California certified
- Attached copies of the invitations sent to the listed DVBEs
- Invitations included the required contact information
- Attached copies of the delivery confirmations for invitations to DVBEs (e.g. mail receipts, fax confirmations, etc.)
- (Step 4) Checked the “No” boxes and listed the business reasons for non-selection of DVBEs contacted
- (Step 1) Contacted the Awarding Department and listed contact and results
- (Step 2) Contacted Other State agency (Office of Small Business and DVBE Certification) and listed the contact and results
- (Step 2) Searched the Federal Pro-net internet database and noted the results
- (Step 2) Contacted Local DVBE Organization(s) and listed the contact and results
- (Step 3) Advertised – IF NOT WAIVED
  - Listed full information for the advertisement(s) and publication(s)  
    [2 ads in one trade and in one DVBE focus publication; OR 1 ad in one dual-purpose publication]
  - Attached a copy of the advertisement(s)
  - The advertisement(s) were published at least 14 days prior to the bid due date
  - The advertisement(s) included my required contact information

☐ **OPTION C: BUSINESS UTILIZATION PLAN (BUP)**

- Prior to the bid due date – Submitted a BUP to DGS-PD and received approval
- STD 840 included with bid
- Designated the BUP Option – Checked the third box
- Attached a copy of the BUP Approval letter from DGS-PD
# FEE PROPOSAL TEMPLATE

School Name: _______________________________ Greening Project

## DESIGN PHASE

- Schematic Design: $ _____________
- Design Development: $ _____________
- Construction Documents: $ _____________

**DESIGN PHASE SUBTOTAL:** $ _____________

## CONSTRUCTION PHASE

- Construction Bid & Procurement: $ _____________
- Construction Administration: $ _____________
- Project Close-out, Warranty and Record Drawings: $ _____________

**CONSTRUCTION PHASE SUBTOTAL:** $ _____________

**<SCHOOL NAME> TOTAL CONTRACT AMOUNT:** $ _____________

### Notes:
1. Maximum value is 70% of contract amount per site
2. Maximum value is 5% of contract amount per site
3. Minimum value is 5% of contract amount per site