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

REQUEST FOR QUALIFICATIONS (RFQ)
FOR LANDSCAPE ARCHITECTURAL DESIGN SERVICES
FOR
GRATTAN ELEMENTARY GREEN SCHOOLYARD PROGRAM
165 Grattan Street
San Francisco, CA 94117

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 Grattan 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 101 15 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: Grattan 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 Grattan ES Green Schoolyard Project and will work directly with the Grattan 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 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

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1 Copies of your insurance policy are NOT required and should not be provide with SOQ submission.
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 Grattan 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. The design elements/priorities that are a part of this scope of work include:

1) Create beautiful and rich series of spaces for children to learn and play while simultaneously providing resources for teachers to educate outdoors. The yard should include elements that act as teaching tools and foster imaginative play.
2) Teach stewardship by creating various habitats and ecosystems, integrating eco-friendly energy and drainage systems, and incorporating living plants and animals into the yard.
3) Develop spaces where children learn by integrating all their senses by incorporating temporary and permanent artwork and incorporating edible gardens, nibbling gardens and sensory gardens.
4) Provide an outdoor sanctuary for students, staff and school community members by creating outdoor classroom spaces, creating an outdoor cooking area, and create small and large social gathering areas that consider comfort.
5) Design a healthy and sustainable landscape the effectively manages irrigation and drainage, utilizes native plants, and utilizes sustainable and environmentally-friendly products.

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 Marie Sayles at (415) 425-3519 or Marie.Sayles@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 Grattan 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 Grattan 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 schematic design drawings for the entire Grattan ES site.

• 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” x 17”) 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 PST 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: Grattan 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.

Grattan Elementary School will use the following selection criteria to evaluate each applicant (100 points maximum):

- Creativity, invention and artistic design (30 points)
- Demonstrated experience in the design of green schoolyards and educational setting for children ages 3-11 (20 points)
- Responsiveness and ability to build rapport with the Green Schoolyard Committee (15 points)
- Value: ability to work resourcefully within budget and schedule (15 points)
- Applied knowledge of green building practices, ecological landscape design, and drought tolerant/native plants (10 points)
- Adherence to RFQ requirements (10 points)

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

- The full name and address of the firm or team
- The name and phone number of a designated contact person
- A brief description of the firm including a Statement of Purpose. Include a description of typical services to clients of the firm
- **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.
- 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.
- 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.
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.

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

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:

- Educational
- Recreational
- Commercial
- 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 9/14/2011
- 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 Grattan 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. Grattan 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
SAN FRANCISCO UNIFIED SCHOOL DISTRICT
2006 PROPOSITION A BOND
JUNE 15, 2009
GREEN SCHOOLYARD PLAN PARTICIPANTS

SAN FRANCISCO UNIFIED SCHOOL DISTRICT

Lori Shelton, Green Schoolyard Project Manager
Sancha Newton, Interim Green Schoolyard Project Manager

GRATTAN ELEMENTARY SCHOOL

Principal Jean Robertson

PARTICIPATING FACULTY & STAFF

Lillian Ciulla - Teacher (2nd)
Maureen Cortese - Teacher (K)
Diane De Francesco - Teacher (K)
Susan Des Baillets - Teacher (3rd)
Diane Dolfos - Teacher (K)
Rebecca Gould - Garden Consultant
Donna Lee - Teacher (2nd)
Margaret Marcoccio - Teacher (4th/5th)
Philip Marcoccio - Technology Instructor
Allison McConaghy - Teacher (SI/K-2nd)
Bradley McMasters - Teacher (3rd)
Charlotte Moraga - Teacher (3rd)

Matthew Reedy - Teacher (1st) and
Liaison to the Greening Committee
Maria Elena Romero - Teacher (1st)
Jessica Schlenoff - Resource Specialist
Jennifer Schultz - Teacher (1st)
Sue Ellen Shea-Perez - Teacher (5th)
Stephanie Silva - Teacher (K)
Marc Silvers - Teacher (2nd)
Catherine Sullivan
Daryl Tran - Teacher (SI/3rd-5th)
Laurie Vargas - Counselor
Kate Walter - Teacher (4th)

PARTICIPATING COMMUNITY MEMBERS

Henrick Bacho
Leslie Bacho
Halle Berry
Richard Bertero
Karen Birch
Amy Breckenridge - Greening Committee Co-Founder
Steve Catechi - PTA President
Jack Chin - Greening Committee Co-Founder
Elaine Clemmons
Henry Clemmons
Deeje Cooley

Paulette Donsavage
Ed Frauenheim
Jim Koulias - Greening Committee Co-Chair
Sala Major
Miranda Martin
Willett Moss
Teri Olle
Karen Osher
Josie Owens
Marie Sayles - Greening Committee Co-Chair
Tia Winn

BAY TREE DESIGN, INC.

Sharon Danks, Principal-in-Charge
Lisa Howard, Principal
Berkeley, California
(510) 872-4554
sharon@baytreedesign.com
www.baytreedesign.com
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## Stand Alone Items

- 11x17 Poster: Summary of Project Goals and Objectives  
- 11x17 Poster: Summary of Participatory Design Process
2006 Proposition A Bond Process

In August 2008, the Grattan 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 enhance the existing schoolyard to create an even more engaging and ecologically-friendly environment for children to learn and play in.

The 2006 Proposition A Bond program is contributing $150,000 to “green” Grattan’s schoolyard. The concept for this renovation was developed by Grattan’s teachers and parents, with the assistance of master planning strategist Bay Tree Design, inc. This plan is intended to guide the future development of the school’s gardening program, outdoor classroom spaces, and play areas. This initial planning phase was complete in June 2009.

The next phase of work will start with the selection of a landscape architect in Fall 2009, who will work with the school community to develop a detailed schematic plan for the Phase One area(s). The landscape architect will build on the ideas of the Activity Zone Diagram, developed in this phase, and identify the more specific scope of work to be constructed using Bond funding. The landscape architect will then develop construction documents for the areas to be built and provide construction administration of these areas which are estimated to be completed during 2011.

Greening Grattan Project

This green schoolyard renovation process builds upon the ongoing Greening Grattan Project, founded in 2003. The mission of the Greening Grattan Project is: “to transform the school into a vibrant and healthy place in which our students are encouraged to play, learn and develop a genuine respect for each other, the community, and the natural environment.”

Green Schoolyard Community

The goals, objectives, spatial layout, and implementation priorities for this green schoolyard plan were defined by a committed group that included the principal, the Greening Grattan Committee, teachers, and family members. Many of these dedicated individuals have donated their services to help create small yard projects prior to this process, were active throughout the process, and have plans for continued work on the yard. Over time this schoolyard will flourish because of the supportive principal and dedicated school community members, many of whom have gardening, design, and environmental training.
PROJECT KICK-OFF

The green schoolyard project began in August 2008 with meetings with the PTA and teachers to discuss the idea of enhancing the schoolyard. Environmental planner, Sharon Danks of Bay Tree Design, inc., led these meetings and presented schoolyard ecology slideshows to open the conversation and brainstorming sessions. The school community used these meetings to articulate their goals for the schoolyard’s future development and list their initial project ideas. Further description of these meetings is provided in Appendix A: Summary of Teacher and PTA Kick-Off Meetings.

The Greening Grattan Committee of parents and school staff also met during this time to discuss the school’s previous greening work, and to ensure that this new project would mesh well with existing efforts. A summary of these discussions is included in Appendix B: Summary of Past Ideas Brainstormed by the Grattan School Community.

GOALS SUMMARY

To achieve their overall goal of improving the schoolyard’s work and play environment, the community developed a set of specific goals and objectives, striving to create a more comfortable space with strong ecological features, educational opportunities, and a wide array of recreational opportunities that expand children’s options beyond ball play. The broad goals include:

- Connecting curricula to the schoolyard landscape
- Including ecological and environmental systems in the schoolyard design
- Reducing asphalt
- Increasing the variety of play options onsite
- Making the schoolyard more comfortable by adding shade, seating, and places to relax
- Reconfiguring the schoolyard to add mounds or other landscape variations
- Improving schoolyard aesthetics

Some of the specific project ideas identified as important by the school community include:

- Outdoor classroom seating
- Hill/variation in land form
- Pond or wetland habitat zone
- Outdoor cooking area
- Stormwater harvesting
- Quiet areas for relaxation
- Natural setting for learning and play
- Shady areas, out of the sun
- Bird habitat (feeders, etc.)
- Places to dig and build
- Renewable energy system
- Outdoor artwork
- Imaginative play areas
- Native American study area
- Math/science study area
- Boulders for geology curricula

A complete, ranked list of the ideas generated by the school community is included at the end of Appendix A.
KEY SITE ANALYSIS FINDINGS

The Greening Grattan Committee worked with Bay Tree Design to research the existing physical conditions and uses of the school site in January 2009. Some of the issues discussed included: the existing uses of various parts of the school site; shade patterns in the spring and fall; pedestrian and vehicle circulation; ecology; and a summary of opportunities for improvement. This information was compiled on maps of the school site, 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 C: Site Walk Maps, and a summary of the most important findings are below. Photographs taken during the walk by Sharon Danks are included in Appendix D: Images of the Existing School Grounds.

USE PATTERNS

The school site includes three play yards, each with its own level due to the sloping nature of the neighborhood. Each yard is used by a different age group, with the lowest level used by preschool and kindergarteners and the highest terrace used by the oldest children. All three yards have ball play zones, and two of them have play structures. The school garden is located in a planting area between the building and the sidewalk along Shrader Street, and there are also planting and programmatic areas between the building and Grattan Street. The central courtyard is a separate planning zone, serving as an entry point to the school, a point of connection for the classroom spaces, and as a programmatic space in and of itself.

PEDESTRIAN & VEHICLE CIRCULATION

The most commonly used pedestrians entrances to the school are the main building entrance on Grattan Street (into the courtyard) and the side entrance gate on Shrader Street. CDC students and their families often use the smaller entrance on Grattan Street.

Vehicles deliver students to the school along Grattan Street and Shrader Streets. The school bus loading zone is on Shrader Street, between the side entry gate and Alma Street. Staff parking is in a small lot at the corner of Shrader and Grattan Streets. The upper playground, entered from Alma Street, is sometimes used for event parking by the school community after school hours and on weekends. This same gate is a required fire truck access location for emergencies, so a portion of this schoolyard must remain paved in this location. (See fire truck access lane on the Circulation Diagram in Appendix C.)

LACK OF SCHOOLYARD MICROCLIMATES

The two upper playground spaces are currently wide open, with very little shade cast by the perimeter street trees and the building. This means that on warm spring and fall days, the playground is very hot and children have few refuges from the sun. On the upper yard, the portable buildings onsite cast a small amount of shade toward the playground in the afternoon, and the newly planted tree also provides a small amount of shade that will grow as it matures. The middle yard is in full sun at all times. The lowest yard is the shadiest playground, receiving a deep shadow from the school building most afternoons. The courtyard space has a mix of sun and shade throughout the day as the sun passes overhead. Its deep eves mean that at least part of the space is cool and protected from rain at all times. The front gardening beds along Grattan Street, under heavy tree canopies, are almost always in deep shade. Since this space is also one of the lower points onsite, it is also somewhat damp.
WATER SOURCE LOCATIONS

At least one hose bib was noted in each of the main spaces on the site including the upper yard, middle yard, lower yard, courtyard, and side garden. Our site walk team did not check them to make sure they were all operational. Water fountains are also present in the upper, middle, and lower yards as well as the courtyard.

OPPORTUNITY AREAS

During the site walk, the committee identified some areas of opportunity on the school grounds. Due to the relatively small size of the grounds, one theme was the desire to use all of the space on the grounds for productive purposes. The committee identified the areas behind the portable classrooms as a potential location for storage of gardening and outdoor classroom materials (to be accessed by only by adults), and the corridor space next to the portable classroom as a potential outdoor classroom or storage space. The group noted that the wooden portion of the retaining wall in this location is leaning out toward the corridor, and would like this wall to be assessed for its structural stability. (See photos)

The committee members present for the site walk also noted the dramatic grade change between the upper and middle yard and the middle and lower yard. The group expressed a desire to make the three spaces flow more easily from one zone to another. We discussed the potential to unify these spaces using an amphitheater to make the grade change more gradual from the middle to upper yard. This idea is now being incorporated into the modernization plans for the site, by CSDA Architects.

The group also expressed interest in softening the grade change between the middle and lower yard in some way, and discussed including a mound on the lower yard in this location.

*The photo below (left) shows a 6 foot tall committee member illustrating the height of the grade change between the middle and upper playgrounds, without the upper wall and fence. (The top of his head is the approximate level of the playground’s surface.)*  
*The photo below (right) shows the existing grade change between the lower and middle playgrounds.*
The group noted that there were many opportunities to add greenery, in the form of trees and plantings to the upper, middle, and lower yards, for both play and learning purposes.

The group also identified opportunity areas along Shrader Street to improve the aesthetics of the side entrance, improve the function and capacity of the school garden, and add welcoming touches to the corner of Shrader and Grattan Streets. Along Grattan Street, they identified opportunities to improve the aesthetics of the existing planting strips, and a need to prune the trees that overhang the garden beds to let in more light.

**DESIGN WORKSHOP DESCRIPTION**

Approximately thirty parents and teachers met again in January 2009 to participate in a design workshop organized by Sharon Danks and facilitated with the help of the Greening Grattan Committee. At the workshop, the participating teachers and parents worked in small groups to combine the ideas generated during the project’s kick off discussions with the site analysis research, to come up with designs for the schoolyard. The three small groups at the meeting each produced a draft schoolyard design and then presented their work for discussion with the whole group.

Below are photographs of the workshop in progress, along with a summary of each group’s ideas and pictures of the designs they created. A more comprehensive report of their ideas is included in *Appendix E: Detailed Notes from the Design Workshop.*
This group created an overall theme based on the ideas of earth, wind, fire and water. The earth zone would be the kindergarten area, which would include an earthen hill with plantings in one location and an arbor or tunnel along the stairway. The middle yard would receive a wind theme which would be expressed by placing some of the activities in the “wind shadow” along the retaining wall. In the upper yard, the fire theme would include an outdoor kitchen, and solar thermal panels used to heat water for the kitchen. It would also include a human sundial on the playground. The courtyard would have the water theme, complete with a rain catchment system that would funnel roof runoff into a courtyard cistern, pond or wetland.

Their plan identified a place for an outdoor classroom space in each of the yards, to make classroom management easier. They also blended the edges of the different playgrounds to improve the flow from one level to another, and included a large greening zone in the upper yard, between the portables and the main classroom building.
Group 2 created a design and divided it into different priority categories.

Their top priority was to make the upper yard flow into the middle yard using an extended, multi-level green space with an amphitheater, to soften the grade change. They incorporated an outdoor classroom space, bench seating, and a kitchen area into this design. They also wanted to move the main garden into this new extended green zone in the middle yard.

The group’s second priority was to create a forest near the oak tree in the upper playground, and to add a space for painting activities and other calm pursuits in the space between the bungalows and the school building.

Their third priority was to create the entry garden near the Shrader Street gate, and to include nature play themes in the garden. They also wanted that space to allow for open-ended, active play.

This design also included ideas such as: creating a multi-leveled sandbox in the lowest yard; making the back wall of the middle yard into a climbing wall (for horizontal climbing); reducing the basketball court to half court size in the upper yard and separating ball play zones from quieter spaces; capturing rainwater from the bungalow rooftops; and turning the walls of the ramps into panels for art activities such as water painting.
DESIGN WORKSHOP GROUP #3

Group 3’s design calls for a large, curving amphitheater between the upper and middle yards, that includes a wheelchair accessible path into the amphitheater. It includes an extensive nature play zone (called the “enchanted garden”) between the bungalows and the school building, extending out into the yard and up to the edge of the basketball court. The plan also includes hills and other gradual variations in topography within the nature play zones. They would like to add trees around the perimeter of the school, in all three yards, but particularly along the east side, near the houses. They also would like to harvest rainwater and use it to create flowing water features.

In the lower yard, their plan also included a green zone at the south end, with a hill against the retaining wall to soften the grade change. They would like to add a gazebo and/or playhouse built from natural materials, and “lumps and bumps” to play on.

The middle yard would include the large amphitheater, described above, and a painted periodic table. They wanted to keep active play features such as the handball wall, and asked to consider changing the play structure to something that would be more interesting and challenging.

For the upper yard, in addition to the large green zone, they would like to add a chicken run between the portable and the fence (in a narrow, existing corridor), and add living roofs to the bungalows. If possible, they suggest moving the portable that is closer to the school building 15’ further north, to create a courtyard between the portable classrooms. They would like to keep the ball play zones, but convert them into half courts so more children can play at once, and add more painted elements to the asphalt.
ACTIVITY ZONE DIAGRAM

After the design workshop, Bay Tree Design reviewed the school community’s ideas and combined them to create an Activity Zone Diagram, which was subsequently reviewed and refined by the Greening Grattan Committee, Principal Jean Robertson, and SFUSD staff and architects working on the Prop A Bond’s modernization project. The resulting Activity Zone Diagram, approved by the school community in June 2009, represents the culmination of the school community’s work to date.

The plan expresses the Grattan 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 Prop A Bond process and any future work the school envisions for their site (to do on their own) over the next 5-10 years.

The text below summarizes the main ideas in the Activity Zone Diagram, and groups the ideas according to their locations within the schoolyard. The description below is intended to accompany the Activity Zone Diagram for Grattan’s green schoolyard, dated May 13, 2009. It follows the diagram in sequence, starting from the top right corner and proceeding counter-clockwise. Please see the attached Diagram.

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, staff, parents and community members over the course of the school year, and were informed by previous planning efforts at the school.

Overall Framework: The yard is currently divided into a series of terraces (lower yard, middle yard, and upper yard). In the new schoolyard configuration, each yard will have a combination of ball play zones and nature play areas for recreation and spaces that can be used as outdoor classrooms. The planting strips along Shradar and Grattan Streets wrap the school with outdoor classroom spaces and gardens, and the central courtyard provides additional activities at the heart of the school.

Comfort: The new design will make the schoolyard a more comfortable place by providing shade, adding seating, and adding “quiet zones” where children and adults can relax comfortably.

Ecology: The new schoolyard design is intended to bring greater habitat diversity to the school grounds and attract local beneficial wildlife such as native birds, dragonflies, butterflies, and other pollinators. The new plantings will primarily be California native plants and will emphasize seasonal change and drought tolerance. A garden with edible plants will also produce crops in the fall, winter and spring, providing nutritious fruit and vegetables for the students. All of the plantings will be rich teaching resources.

Education: Each yard will include outdoor learning spaces, with curriculum-tied features, intended to provide teachers with additional hands-on resources to enhance the coursework they are already teaching.

Recreation/Play: The plan includes areas devoted to active play, exploration and creative adventures in addition to play structures and ball playing areas that are already present in the yard. The idea is to increase the diversity of play activities offered to the children so that they may have more choices at recess time.
Community: The schoolyard improvements will require some maintenance and at the same time provide the Grattan community with an opportunity to personalize their space. The school community plans to be active stewards of the grounds and will hold work parties throughout the year to engage families in ongoing maintenance tasks. Students may also be involved in caring for the grounds in some way.

PLANTINGS ALONG GRATTAN STREET

New Entryway: The school will have a new front entrance design, developed as part of the modernization upgrades. Design firm CSDA Architects is currently working with the school to finalize these plans. If the final plans include planting beds, their themes can be tied to either of the concepts listed below for the planting areas to the east and west of the main doorway.

Planting Beds, from the main entrance to the northeast corner of the school site: These beds are intended to welcome visitors with cheerful plantings. The school would like to fill them with native plants that have colorful flowers and leaves in each season of the year.

Wildlife Habitat, west of the school’s entrance: This existing planting strip, between the sidewalk and the building, will become a wildlife habitat zone. The ground in this area is somewhat moist, so the plantings may include riparian and wetland vegetation selected for their value to local wildlife. The overall concept includes a meandering pathway that extends from one end to the other, stretching the length of the planting strip. The design will include a dry riverbed feature, created with boulders and rocks. Thematic points of interest along the path will be added so the teachers can connect this space to the Native American curriculum studied by many grade levels.

This planting area has an existing picket fence and gates. It also has a thick tree canopy that the school would like to prune and thin to achieve this new garden concept. Pruning the trees will also make the space somewhat warmer, which will make it more appealing to the teachers to use as an outdoor classroom space.

SHRADER STREET TEACHING GARDEN

The Teaching Garden on Shrader Street is already a productive edible garden and teaching space. The school community would like to continue to use this area in the same way in the future, and plans to add additional edible plantings. They would also like to create a more structured teaching environment that would include outdoor classroom seating and an outdoor sink so the classes can wash garden produce. To make this garden more productive, the school would like to prune the trees that are currently making too much shade there, and/or remove a pine tree in the garden.
UPPER PLAY YARD

Nature Play Zone: The Nature Play Zone in the upper yard will be the heart of Grattan’s new green schoolyard configuration, and is the school’s highest priority. The goal of this space is to provide a place for children to learn and play in a setting surrounded by plants, trees, mulch, boulders, logs, and other natural materials. It will include edible plantings and orchard trees, as well as ornamental plantings, emphasizing drought tolerant, native plants and those that provide seasonal color. The space will also include picnic tables and other types of seating to promote small group class work, conversation with peers, and outdoor art and other activities.

This area will cover approximately one third of the area of the upper yard, and will surround the portable classrooms on two sides. It will be crossed by a set of wheelchair accessible pathways that will extend from the Shrader Street gate to the paved portion of the yard, and to each portable classroom. The central pathway will include trellis-covered archways, set in planters. There will also be a wide, paved pathway at the north end of this garden, along the building.

The new design includes a storage area behind Portable #1, which is intended to keep teaching supplies and play materials handy, for use on the yard. This space would only be accessed by adults and could remain behind a locked gate.

If found to be suitable, the school would like to use the rooftops of both portable classrooms to capture stormwater for use in irrigating the adjacent plantings. Cistern tanks could potentially be placed (above ground) next to or behind each portable classroom. If possible, the water storage tanks should each include a meter that shows how much water the tank is currently holding, to make the them more useful for classroom water studies.

The plan includes a space at the south end of this nature play zone as a potential home for a chicken coop. (The adjacent retaining wall in this area may need to be studied to see if it needs to be repaired before implementing this portion of the plan.) The chicken coop is low on the school’s priority list.

This diagram also includes a seat wall a the north end of the nature play zone, intended to keep woodchips/mulch from spreading into the pathway next to the building, and to keep some of the garden’s moisture away from the building’s foundation. (i.e. The highest point of the new nature play zone could be next to the seat wall, allowing water to drain into the nature area and away from the main building, if desired.) This idea could also be extended to the eastern perimeter of the nature play zone, either as a seat wall, or as a picket fence—to keep balls out of the garden and to help to contain the loose woodchip material that will be covering the ground.

There is now one hose bib near the future Nature Play Zone, but it would greatly benefit from the addition of an irrigation system and additional hose bib connection points.

Ball Play Zone: The remaining portion of the upper yard will be devoted to ball play and used by the physical education classes. This area of the yard will include the existing basketball court and a large (unstriped) paved area for open ended active play. The school community is also interested in the idea of adding additional striping so that the same paved zone can be used for many different games, perhaps in a series of smaller game courts. They would also like to add covered “sockets” to the asphalt to allow sturdy game poles to be added to the yard on a rotating basis, to make the paved portion of the playground more flexible.

The school would like the storage container, currently on the yard, to be placed just west of the Alma Street gate, along the fence line, to keep it accessible while placing it out of the way of games and the nature play zone.
TRANSITION ZONE BETWEEN UPPER & MIDDLE YARDS

The 6 foot grade change between the upper and middle yards will be bridged by three different methods: a stairway, a wheelchair accessible pathway, and an amphitheater. This configuration will allow the upper and middle yards to be used with greater flexibility—allowing their use in an integrated fashion and as separate spaces. It will also add additional outdoor meeting and assembly capacity, which will greatly enhance the functional, aesthetic, and social aspects of the schoolyard.

Architect Ken Kerch and his colleagues at CSDA Architects, who are working on the overall Proposition A Bond modernization plan for Grattan School, are currently designing the amphitheater, ramp, and stairs with the Grattan School community. Their design process has overlapped with the green schoolyard planning process, and there has been some productive collaboration between our two projects. CSDA Architects’s plans now reflect and expand on the ideas that came out of the green schoolyard project’s initial site walk and design workshop. Andrea Dawson (SFUSD Senior Project Manager, 2006 Proposition A Bond Program), has also helped with this design discussion and collaboration.

At this writing, the plan is to include: three wide tiers for seating; a large planter with a tree that will shade part of the seating area; boulder seats/barriers at the top of the amphitheater, to slow children’s movements near the top; and some type of artwork or ornamental treatment of the paved surface below the amphitheater (to act as a “stage”). Since this amphitheater/ramp/stair configuration is still being developed at this time, the enclosed Activity Zone Diagram does not represent the final version of this portion of the schoolyard design. The amphitheater/ramp/stair configuration in the attached drawing is based on a concept sketch by CSDA Architects, given to Bay Tree Design in May 2009.

The new amphitheater/ramp/stair configuration will also require that the existing play structure on the middle yard be moved to the south end of that yard.

In the future, the school community also plans to adorn the walls of the wheelchair accessible ramp between the upper and middle yards with murals and/or chalkboards that will encourage art-related play during recess.

MIDDLE YARD

The footprint of the amphitheater and its ramp will reduce the open space in the middle yard somewhat, but will be useful as learning and play spaces. The play structure will be moved to the south part of the yard, as described above. A nature play zone will be created along the east wall of the middle yard, and will include: shade trees, soft mulched surfaces, boulders, logs, and other play props for imaginative games. The central space in the middle yard will be used for ball games and physical education classes.

LOWER YARD

Nature Play Zone: The school community would like to soften the grade change between the middle and lower yards by adding a nature play zone in the form of a low hill, placed against the existing retaining walls in the southeast corner of the yard. This gentle hill would have a soft surface of mulch and plantings, and could include features that enhance play, such as an embankment slide, set directly on the gentle hill. The space could also include logs or boulders for small group seating.
Stormwater Collection: The new schoolyard configuration includes a rainwater collection system fed by runoff from the existing tool shed’s roof. Water collected here may be used to irrigate the new plantings in the nature play area for part of the year.

Shady Nook: The design includes a small space at the northeast corner of the yard that would be suitable to add one or two small deciduous trees (or large shrubs) with seasonal color changes/flowers. This area is envisioned as a quiet, leafy place for children to play or sit with a friend. It may also include a playhouse.

COURTYARD

The central courtyard is the first thing visitors see when they walk into the school, and is a constant presence in the daily lives of the students and school staff members. The plan calls for developing the courtyard space with attractive plants, seating, and other features that add to the resources available for the school’s science curriculum, so that science studies permeate the environment and add interest to this central area. For example, the courtyard could include planting beds for plant growth studies; weather observation tools; and other related elements. The school community has already started work on some of these projects.

SCHOOLYARD GREENING PRIORITIES & PROPOSED PROJECT PHASING

The Activity Zone Diagram for Grattan’s green schoolyard includes ideas that are larger than the Prop 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 phases as described below, to accomplish their goals as the bond funds allow.

Please note: The school intends to build and plant some of the green schoolyard projects on their own. 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

Projects that will be implemented by the school community, on their own, before Phase One include:

- Improvements to the existing school garden along Shrader Street.
- The school community will create more signage to explain their green schoolyard projects.
- The school plans to provide additional green schoolyard-related training for teachers.

PHASE ONE

Projects to implement with Prop A Bond funding, listed in order of priority:

1a. The school’s highest priority for the use of their bond funds is the large Nature Play Zone in the upper yard. This zone wraps around two sides of the portable classrooms, in an “L” shape.
The project includes: asphalt removal; some grading to create slightly rolling terrain, an ADA-compliant main pathway; an irrigation system; a stormwater cistern to collect rooftop runoff from the portable building(s); boulders and/or logs; picnic table seating; trellis archways; orchard and shade trees; edible and ornamental plantings; and a soft, mulched ground surface.

1b. The school’s second priority is the **Nature Play Zone along the east side of the yard**, that includes asphalt removal and improvements to two, smaller adjacent spaces in the middle and lower yards. Both of these spaces will be soft, mulched areas with shade trees and plantings, and each space will need irrigation. The lower space will also include a new low hill and other play features for the youngest children.

The Greening Grattan Committee would like to focus their construction funds on the *infrastructure* needed to create these projects, such as asphalt removal, irrigation and drainage systems, ADA compliant pathways, small hills/landforms, etc. The school community would like to do some of the smaller elements on their own (i.e. seating, plantings, signage, artwork, etc.), following the advice of their landscape architect, to help their funding go farther.

**PHASE TWO**

Projects to implement after the bond process is over, with funds raised by the school. Major projects may be implemented one per semester or year, or as funding and volunteer assistance allows. These projects are likely to occur within the next 5 years.

2a. This list will include the items on the Green Schoolyard Plan/Activity Zone Diagram that were not accomplished during the bond process. For example, further development of Priority Areas 1a and 1b, listed above, if needed; plantings and other improvements in the planting beds along Grattan Street; additional schoolyard artwork and signage.

**NEXT STEPS**

After completing this initial, broad-brush, participatory design phase, Grattan School will embark on the detailed design portion of the project, which will be led by a landscape architect that the school community selects. Grattan School will work with Lori Shelton (SFUSD Green Schoolyard Project Manager) to write an RFQ for the Phase One Area of their green schoolyard project, listing the items they plan to implement with their bond funds. The Green schoolyard committee and principal will help to interview and select the 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 (i.e. building benches or 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. Then, the school community will add their portion of the work after the contractor’s construction phase has been completed.
The first green schoolyard meeting for the faculty at Grattan School was held on December 1, 2008. The meeting was led by Grattan’s Principal Jean Robertson, Master Planning Strategist Sharon Danks (Principal, Bay Tree Design, inc.), and Sancha Newton, representing SFUSD. All of the faculty members attended the meeting, along with parent greening committee representative, Marie Sayles. The following day, Sharon Danks led a similar meeting for the parents at an evening PTA meeting. Approximately 15 parents attended the meeting.

Each session opened with an explanation of the Prop A Bond’s green schoolyard program, followed by a green schoolyard-themed slideshow. The slides illustrated some of the things other schools have done with their school grounds to encourage schoolyard ecology, and wider options for outdoor learning and nature play. After presenting each slideshow, Sharon reviewed an extensive list of ideas for the schoolyard that the school community has generated over the last three or four years. This list included a draft mission statement for the project, a summary of the project’s goals, and a long list of potential elements to include in the green schoolyard. After reviewing the lists, the teachers and parents each brainstormed additional items and added them to the existing lists. After the lists were completed, each participant received 8 stickers that they used to “vote” for their top priorities on the lists. They 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 ideas generated in these meetings are listed below, along with a number that indicates the quantity of “votes” each item received. This voting process was intended to help determine the group’s initial priorities, but the list can be revisited as the project progresses. The teachers intend to continue brainstorming and discussing these topics in the weeks to come. They will also work on revising the mission statement. The parent group has another mission statement that they have been working on, as well, and they plan to continue discussions about the brainstormed topics, before we have our site walk meeting in mid-December.
Summary of the Teacher & Parent Priorities as Expressed in these Brainstorming Sessions

There are many ways to look at the voting data for the teacher and parent groups, since many of the items on the list overlap and can be grouped into different types of categories. For this reason, the results below are expressed a few different ways. (There are other ways to interpret this information, too.)

One thing I found interesting is that the teachers' answers were fairly clustered together, and the parents' opinions were more varied (fewer votes clustered together). Also, both groups prioritized curriculum connections to the schoolyard and schoolyard ecology systems near the top of their wish lists, and schoolyard aesthetics/beauty at the bottom. Both also highly valued wildlife habitat connections.

**Teachers:** 17 (or 18?) people voted, with a total of 138 votes (approx. 8 each)

*The specific items on the list that received the most votes were:*
- Outdoor classroom (24 votes with two items below combined)
  - Create a better space for an outdoor classroom (13)
  - Place to seat a whole class (outdoor classroom) (11)
- Wildlife habitat areas (all parts combined) – (20)
  - Note: pond/wetland received 9 of these votes!
- Create a hill to add variation to the land form of the schoolyard (12)
- Native American studies, curriculum ties (huts, gate connection, and flat rock combined) (10)
- Vines on the fence (7)
- Stormwater system (6) – *also expressed interest in other water systems*
- Edible garden plants (combined) (6)
- Create shady areas with seating (5)

**Teachers' votes by category, showing relative priorities:**
1. Nature: Schoolyard ecology (37 votes combined)
2. Schoolyard configuration: Reshape the way the schoolyard is used (34 votes combined)
3. Learning: Curriculum connections to the schoolyard (23 votes combined)
4. Comfort: Schoolyard comfort, microclimates, and seating (22 votes combined)
5. Play: Schoolyard recreation (20 votes combined)
6. Beauty: Schoolyard aesthetics (7 votes combined)

**Parents:** 14 (or 15?) people voted, with a total of 114 votes (approx. 8 each)

*The specific items on the list that received the most votes were:*
- Wildlife habitat areas (all parts combined) – (15)
- Imaginative/nature play (all parts combined) – (11)
- Link renewable energy system to pond (i.e. solar powered fountain) (8)
- Science curriculum connections to the schoolyard (7)
- Place to seat a whole class (7)
- Outdoor kitchen space to cook with a class (5)
- Edible garden plants (combined) (5)
- Math curriculum connections to the schoolyard (5)
- Water systems (combined) (5)

**Parents' votes by category, showing relative priorities:**
1. Nature: Schoolyard ecology (34 votes combined)
2. Learning: Curriculum connections to the schoolyard (25 votes combined)
3. Play: Schoolyard recreation (20 votes combined)
4. Comfort: Schoolyard comfort, microclimates, and seating (18 votes combined)
5. Schoolyard configuration: Reshape the way the schoolyard is used (10 votes combined)
6. Beauty: Schoolyard aesthetics (7 votes combined)
Goals & Ideas for the Green Schoolyard at Grattan School

Teachers’ Ideas & Priorities = (#) (full faculty attended at a faculty meeting)
Parents’ Ideas & Priorities = (#) (ideas added by the 15 parents who attended the PTA meeting)

LEARNING: Curriculum Connections to the Schoolyard

- Outdoor arts & crafts:
  - Art studio area (2)
  - Kiln for ceramics (1)

- Cooking: Outdoor kitchen space to cook with a class (sink, gas burner, food prep space) (4) (5)

- Cooking/Renewable energy: Solar-powered oven

- Garden: Add livestock to schoolyard, including chickens, goats, and/or rabbits (consider allergies, too) (2)

- Geography: Paint US or world map (within basketball court?) (3)

- Math: (5)
  - Paint sectors on dodge ball court to illustrate percentages
  - Add meters to measure energy, etc.

- Native American Studies:
  - Huts/teepees (1)
  - Gate to connect exploratory area to Native American garden (5)
  - Large flat rock for grinding acorns (4)

NATURE: Schoolyard Ecology

Wildlife habitat areas

- Pond or wetland habitat area (9) (6)
- Natural settings: spaces with trees, shrubs, leafy ground covers; native & drought tolerant plants (4) (3)
- Pollinator gardens for bees and butterflies (1) (2)
- Bird houses & bird bath (4) (4)
- Make some sort of connection to the creek in the neighborhood (could be a themed art or plant installation rather than daylighting) (2)

Edible garden

- Fruit trees (2) (2)
- Berry patch (1)
- Vegetable beds (3) (1)
- Permaculture & nutrient cycling (1)
- Small greenhouse/cold frame for growing plant starts (1)

Science: (4) [did not specify which ideas]
- native plants
- composting
- plant life cycles & pollination
- health & nutrition
- painted periodic table
- boulders tied to the geology curriculum (2) (3)
- weather station & rain gauge

Signage: bulletin board/sign at garden (& elsewhere?) to communicate current curricula and/or plantings

Teaching equipment: Add white board to main outdoor classroom teaching area (3) (1)

Time telling/solar system: Sundial (human sundial or sundial mounted on the building) (2)

Create a permanent place to do temporary/ephemeral student-driven experiments & art installations (1)

Renewable energy systems

- Solar power/renewable energy demonstration
- Wind energy demonstration
- Link energy to pond (i.e. solar powered fountain) (8)

Water systems

- Drip irrigation system (3) (2)
- Greywater system (1)
- Stormwater system (6) (3)
- Cover storm drains to keep litter out (in a way that water can still percolate)

Material reuse & recycling

- Compost (1)
- Better waste management & recycling
- Get creative with the dumpster, paint it?

Reduce asphalt (1)

Notes compiled by Sharon Danks, Bay Tree Design, inc.
PLAY: Schoolyard Recreation

Active play
- Circuit (track/trail) and other places for running around (2) (1)
- Labyrinth/maze (2) (2)
- Vegetated tunnel (i.e. vine tunnel on wire, using kiwi or grape vines) (3)
- Paved play space for ball games (basket ball, four square, handball, etc.) (2) (1)
- Trees arranged for play

Imaginative/Nature Play
- Water play (open water or hand pump/spigot) (1)
- Water painting on wall near sandbox (3)
- Imaginative play areas (play houses, etc.) (1) (4)
- Places to find bugs/play in the bushes and soil (1) (4)
- Places to dig and build (3) (2)
- Play with tree rounds/loose parts (1)

Decentralized play areas (so the children don’t all play in one place at the same time) (2)

COMFORT: Schoolyard Comfort, Microclimates & Seating

Seating & gathering spaces
- Place to seat a whole class (outdoor classroom) (11) (7)
- Picnic tables (1) (2)
- Large gathering place for all-school assembly / morning announcements / community BBQ (1)

Relaxation
- Meditation huts (1)
- Quiet places to sit and talk in small groups, or be alone for a little while (3) (6)
- Zen garden for relaxation (1)

Choice of microclimates
- Create shady spaces to get out of the sun, some with seating (5) (2)

Fix any broken water fountains so children will have enough to drink

Stagger schedule/use of play area to decrease density of children on the yard at the same time

BEAUTY: Schoolyard Aesthetics

Aesthetic plantings & focal points
- Vines along fence line (on a trellis) (7)
- Water features/fountains
- Grass (please note: SFUSD will not allow new grass to be planted)

Add outdoor art installations
- Murals
- Mosaics (1)
- Sculpture (5) – climbing (?)

Restore aesthetic
- Paint the existing benches
- Eliminate chain link fence & put something better (1)

SCHOOLYARD CONFIGURATION: Reshape the Way the Schoolyard is Used

- Create a nice entrance for the back of the school (1) (1)
- Create a hill to add variation to the land form of the schoolyard (12) (6)
- Emphasize “open ended” design elements
- Focus on the edges of the playground
- Make the yard easier to supervise during recess & other play times
- Landscape the Shrader St. entry garden with butterfly habitats and garden boxes
- Landscape the Kindergarten yard (i.e. replace vine on Kindergarten fence) (4) (1)
- Build decking around the Kindergarten yard sand box to keep the sand in the box, offer multiple levels for play, and a space that can be used as a stage (4) (1)
- Create a better space for an outdoor classroom (the front is too cold & wet) (13) (1)
- Connect the play yards (K to middle to upper)
- Trees in the middle (i.e. J.Kahn “Fairy Land”) (?)
Grattan School’s Green Schoolyard Program
Summary of Ideas Brainstormed by the Grattan School Community in the Past

This summary document presents an overview of the Greening Grattan Committee’s mission statement, goals & objectives, and site program desires, developed over the last three or four years. Sharon Danks, Master Planning Strategist for SFUSD, reviewed the Committee’s written work and compiled this summary as a starting point for the community design process for the SFUSD 2006 Proposition A Bond, Green Schoolyard Project.

Sources used to create this document include:
- “Greening Grattan: Summary of March 2005 Survey Results”
- “Greening Grattan Committee: Background for May 5th Meeting,” May 2005
- “Report to Wells Fargo from the Greening Grattan Committee,” Dec. 2005
- “Grattan Greening Committee: Goals & Dreams compiled from OAE Workshop,” May 2008

Please note: Some of the information presented below is directly from the sources above. Other elements are recurring themes in these document that Danks inferred and summarized below. All of the items in this document will be up for review and discussion during our kick off meetings with the school faculty and parents in December. This is only intended as a starting point for those discussions.

Green Schoolyard Project Mission Statement

“The Grattan School community seeks to transform Grattan’s school grounds into a vibrant and healthy place in which our students are encouraged to play, learn and develop a genuine respect for each other, the community, and the natural environment. Through an inclusive, participatory process, we will actively engage the Grattan community of students, parents, teachers and neighbors to assess needs, set goals, design plans, and get our hands dirty in creating a better ‘outdoor classroom.’”

- from the Greening Grattan Committee report, Dec. 2005 for Wells Fargo

Project Goals & Objectives

- **LEARNING:** Create a schoolyard environment that can be used by teachers to teach a wide variety of subjects including: PE, science, math, language arts, and art instruction; foster place-based learning.
- **PLAY:** Provide a wider variety of recreational choices for children during recess & after school play times (i.e. include play structures, open spaces, and nature play areas)
- **COMFORT:** Provide a wider range of microclimate choices in the schoolyard (i.e. diversity of deep shade, part shade, and sunny areas); Include large & small gathering places/seating
- **BEAUTY & NATURE:** Create a more aesthetically pleasing (less institutional) upper yard and more natural setting, mirroring the courtyard and garden
- **COMMUNITY STEWARDSHIP:** Include students & the rest of the school community in the ongoing stewardship of the school grounds; foster responsibility among students by involving them in site stewardship projects
- **ECOLOGICAL DESIGN & SUSTAINABILITY:** Develop the green schoolyard to improve the ecology of the site, including the use of green building materials and methods, water systems, renewable energy & energy efficiency, food systems (garden), wildlife habitat plantings, etc. Use resources sustainably: reduce, reuse, recycle, use public transit, environmentally sound school supplies, etc.
- **HEALTH:** Promote health through nutrition education, outdoor exercise, and organic landscape management; strive to be toxins free on all areas of the school grounds, inside and outside; rethink school lunch and snacks.
Elements to Include on the Schoolyard

LEARNING: Curriculum Connections to the Schoolyard
- Arts & crafts area outside
- Cooking: Outdoor kitchen space to cook with a class (sink, gas burner, food prep space)
- Cooking/Renewable energy: Solar-powered oven
- Garden: Add livestock to schoolyard, including chickens, goats, and/or rabbits
- Geography: Paint US map within basketball court
- Math: Paint sectors on dodgeball court to illustrate percentages
- Science: native plants, nutrition, composting, plant life cycles, pollination, gardening, etc.
- Signage: bulletin board/sign at garden (& elsewhere?) to communicate current curricula and/or plantings
- Teaching equipment: Add white board to main outdoor classroom teaching area

NATURE: Schoolyard Ecology
- Wildlife habitat areas:
  - Pond or wetland habitat area
  - Natural settings: spaces with trees, shrubs, & leafy ground covers, native & drought tolerant plants
  - Pollinator gardens for bees and butterflies
  - Bird houses & bird bath
  - Make some sort of connection to the creek in the neighborhood (could be a themed art or plant installation rather than daylighting)
- Edible garden:
  - Fruit trees
  - Vegetable beds
  - Permaculture & nutrient cycling
  - Small green house or cold frame for growing plant starts
- Renewable energy systems:
  - Solar power/renewable energy demonstration
- Water systems
  - Drip irrigation system
  - Greywater system
  - Stormwater system
  - Cover storm drains to keep litter out (in a way that water can still percolate)
- Material reuse & recycling
  - Compost
  - Better waste management & recycling

PLAY: Schoolyard Recreation
- Active play
  - Circuit (track/trail) and other places for running around
  - Labyrinth/maze
  - Vegetated tunnel (i.e. vine tunnel on wire, using kiwi or grape vines)
  - Paved play space for ball games (basket ball, four square, etc.)
- Quiet & imaginative Play
  - Water play (open water or hand pump/spigot)
  - Water painting on wall near sandbox
  - Imaginative play areas (play houses, etc.)
  - Places to find bugs/play in the bushes and soil
  - Places to dig and build
- Create decentralized play areas, so the children don’t all play in one place at the same time
**COMFORT: Schoolyard Comfort, Microclimates & Seating**
- Seating & gathering spaces
  - Place to seat a whole class (outdoor classroom seating)
  - Picnic tables
  - Include large gathering place for all-school assembly/morning announcements/community BBQ
- Relaxation
  - Meditation huts
  - Quiet places to sit and talk in small groups, or be alone for a little while
  - Zen garden for relaxation
- Choice of microclimates
  - Shady spaces to get out of the sun, some with seating
- Fix any broken water fountains so children will have enough to drink
- Stagger schedule/use of play area to decrease density of children on the yard at same time

**BEAUTY: Schoolyard Aesthetics**
- Mural
- Mosaics
- Vines for the fence line
- Water features/fountains
- Paint the existing benches
- **grass (Please note: SFUSD will not allow new grass to be planted)**

**SCHOOLYARD CONFIGURATION: Reshape the Way the Schoolyard is Used**
- Create a nice entrance for the back of the school
- Create a hill to add variation to the land form of the schoolyard
- Include ways to make the yard easier to supervise during recess & other play times
- Landscape the Shrader St. entry garden with butterfly habitats and garden boxes
- Landscape the Kindergarten yard (including: replace vine on Kindergarten fence)
- Build decking around the K-yard sand box to keep the sand in the box, offer multiple levels for play, and space that can be used as a stage
Grattan School – Site Photographs, Fall 2008

Grattan Street

Central Courtyard

Shrader Street Garden
Grattan School – Site Photographs, Fall 2008

Upper Play Yard

Space Behind Portables

Middle Play Yard
Grattan School – Site Photographs, Fall 2008

Lower Play Yard
Grattan Design Workshop: Detailed notes from the design workshop’s discussion
Combined notes from Sharon Danks, Bay Tree Design and Marie Sayles, Grattan School

GROUP ONE

Main ideas
• Overall theme: earth, wind, fire and water
• Create an outdoor classroom space in each of the yards, to make classroom management easier
• Blend the edges of the different playgrounds/yard levels, to let them flow together somewhat

Lower Yard: Earth Theme for Kindergarten Yard
• Add vines to fence line next to storage building
• Create a mound or hill at the south end of the kindergarten yard (current location of the sandbox) to soften the level change between the middle yard and lower yard. This hill could be a terraced informal amphitheater (against retaining wall) for outdoor classroom use and for play.
• Create an arbor/tunnel above the stairway that connects the middle and lower yards

Middle Yard: Wind Theme (?)
• Soften the transition between upper and middle yards with a large amphitheater/outdoor classroom space, in the “wind shadow” against the retaining wall
• If using concrete to create this hill/amphitheater, add imprints to reflect “water” theme(?)
• Seating on the middle yard could be moveable tree rounds, moveable?

Upper Yard: Fire Theme for Outdoor Kitchen Zone (Upper Yard near Alma St. gate)
• Put an outdoor kitchen at the top of the amphitheater where the storage contain currently sits (in the windy area, strange choice?) – Move PE container
• Fire theme would be expressed by:
  o Adding an outdoor kitchen (fire-based cooking)
  o Using solar thermal panels to heat water for the outdoor kitchen
  o Add sundial on playground near outdoor kitchen, using basketball post as the gnomon
• Add benches and an arbor to the kitchen area, with fire themes in the seating

Central Playground Area
• Reduce the basketball court to a half court for ball play, so kitchen will have enough space
• Add vegetable/herb plantings on the west side of the Alma Street gate, not far from the outdoor kitchen (connects to the green belt below)
• Add a planted arbor/tunnel along the south edge of the building to shade classrooms and make the edge softer; and the path to the kindergarten yard more pleasant

Upper Yard “Green Belt,” between playground entry on Shrader & Alma St. entry (Upper Yard)
• Make the Shrader Street entrance a green entry, that includes an ADA compliant walkway (with eco-friendly surface) to the bungalows and main building.
• This green belt would connect the Shrader Street garden with the outdoor kitchen along Alma St.
• Build up the ground surface between the portables and the main building, with space for plantings
• Surface of the berm could be artificial turf
• Add shade trees and greenery in a curving edge along front of bungalows, connecting to live oak tree
• Capture rainwater from the roofs of the portables and store in cisterns behind portables.

Courtyard: Water Theme
• Set up a rain catchment system to capture runoff from the roof in a courtyard cistern, pond, wetland, or other water feature (where the pine used to be).
• Since the courtyard receives a lot of foot traffic, this would be the central theme for the school.

Garden
• Incorporate native American theme, such as three sisters garden and similar

Grattan Street Plantings (near Grattan and Shrader)
• Create a “natural setting” using native plants
• Select plants to create habitat for salamanders, birds, and other wildlife; add bird houses.
• Consider the drainage in the front planting strip (floods)
**GROUP TWO**

**Main ideas**
- This group identified three different priority levels
  - 1st Priority – Make the upper yard flow into the middle yard using an extended, multi-level green space with an amphitheater to soften grade change. Incorporate an outdoor classroom, bench seating, and kitchen space into this design. Move the main garden to this zone in the middle yard.
  - 2nd Priority - Forest near the Live Oak tree. Quiet painting area to side of bungalow.
  - 3rd Priority - Shrader street entry. Make natural play space and related storage. Active area, open ended

**Lower Yard**
- Create a multi-level sand box area for play and to make the grade change less distinct. (Doesn’t look like they intend middle yard children to mix with K children)
- At the entrance to the K yard along Grattan Street, add a California-themed mural on the building, along the ramp, and plantings in the planter

**Middle Yard**
- Use most of the open space in the middle yard, along Alma Street, to create an extensive new green zone that extends from the eastern property boundary to the upper yard’s Alma entrance gate.
- At its highest point in the upper yard, the new green zone will include an “entry court” that fills the space where the current PE container is located. This area will have trees in planters, bench seating, and arbors/trellises. It will be clearly demarcated as “not ball play,” with a calmer theme. May include music play and/or nature play features. Remove the raised fence/wall separating the upper yard from the middle yard in this area.
- Use an amphitheater to soften the grade change and invite people to flow from one yard to the other. Amphitheater will be the main outdoor classroom space for this yard, and largest onsite.
- Create an outdoor kitchen at the base of the amphitheater, along Alma Street, and planters to define the edges of “the stage” (leaving some room between planter and back wall.
- Make back wall of the middle yard into a climbing wall (“natural”?). Add soft safety surface below it.
- Use ramp walls on grade change from upper to middle yards. Turn them into outdoor art areas by adding plexiglass or chalkboard walls to the sides of the ramp. (Art at recess features)
- This new extended garden space would become the main garden for the school.

**Upper Yard**
- **Central forest:**
  - Plant a forest in the area around the (current) lone tree, and add picnic tables. This would become a central “nature play” zone.
- **Ball games**
  - Reduce basketball court to half court size
- **Bungalow zone:**
  - Capture rainwater from bungalow rooftops and store behind bungalows; maybe one in front, too
  - Also use part of the area behind bungalows for more formal storage of nature play equipment and other supplies (i.e. large scale wooden blocks for building and making sculptures and structures)
- **Shrader Street entry garden**
  - Create a large, new garden near the current poetry wall and Shrader St. entrance that would be a green entryway and a place for nature play
  - Leave a 10-15’ wide asphalt access strip along the building to make it easy to access the doors
  - Create a second, curving, wide pathway through the garden that would be wheelchair accessible
  - Encourage active play with natural materials and “construction-type” nature play in this zone. (Building things with natural materials like large wooden blocks); add tunnels, labyrinth, things to climb (rocks/logs?)

**Courtyard**
- (no details noted. Just green edges on existing planter squares)

**Existing Garden**
- The existing garden area would now be used as a secondary garden and classroom meeting space, with picnic tables/benches and planters
- Create a dry creek feature through this linear garden space
- Add some wildlife habitat plantings
- Keep some planters, too.

**Grattan Street Plantings (near Grattan and Shrader)**
- Exploration front area: wildlife habitat with Native American theme, California native plants, marsh area/pond near corner of Shrader and Grattan) – Habitat would be for birds, skinks, frogs, etc.
GROUP THREE

Main ideas
- Tiered amphitheater better upper an middle yard, that wraps around to include ADA ramp access
- Large green space near portables
- Renewable energy, food production, wildlife habitat, removing asphalt
- Recognize that we need to enhance the perimeter for kids to find and explore
- Adding more topography all over
- Add trees around the entire perimeter of school, in all three yards (particularly on east side near houses, Alma St)
- Cisterns to create water flow from yard to yard. In garden, amphitheater, etc.

Lower Yard
- Create a green zone at the end of the K yard closest to middle yard that includes:
  - A tiered hill against the retaining wall to the middle yard to soften the grade change
  - A cistern that collects water from the building’s roof (not sure how it would function from drawing?)
  - Add gazebo(s), outdoor playhouse (using natural materials)
  - Add “lumps and bumps” to play on, so the yard is not so flat and boring
- Paint the asphalt between the green space and the play structure
- Add a row of trees along the edge of the K and Middle yards, to screen the neighboring houses
- Consider changing play structure into something more interesting/alternative

Middle Yard
- Create large amphitheater that softens the grade change between upper and middle yard
  - Amphitheater should include a way for a wheelchair to perch in the middle (connect to the ramp turning point nearby, keep at same level)
  - Amphitheater’s “space” will start at the top, in the area where storage container is now
- Paint a periodic table on the pavement between amphitheater and play structure
- Keep the well-used handball wall along the back of the yard, near play structure
- Consider changing play structure to be more interesting/alternative
- Use cisterns to allow water to flow between upper and middle yard (again, functionality unclear on drawing)

Upper Yard
- Create a large “enchanted garden” that wraps around the portables and takes half of the upper yard space. Garden will include:
  - Remove paving for the enchanted garden (access to portables ADA compliant?)
  - Picnic tables, benches and other types of seating; some seating around the edges of planters near Shrader St. entrance
  - Orchard trees and other vegetation
  - Create quiet spaces away from ball games
  - Add chicken run next to the portable that is close to retaining wall (the one that is leaning); see if the district will fix the retaining wall.
  - Add living roofs on bungalows (shown with garden beds?)
- If it is possible to move a portable over:
  - Move northern portable about 15’ further north, to create a “courtyard” between two parallel portables
  - In this courtyard, add an alternate kitchen location
- Ball play
  - Keep a large portion of the upper yard for ball play; convert courts to half courts
  - Add painted elements to the playground
  - Add handball wall to fence line along Alma Street, on west side of Alma gate
- Add solar powered night lighting
- Add retractable sun shades to shield the south-facing classrooms along the upper yard
- Shrader street entrance: keep asphalt along building as walkway, but entry will be through new green space with trees, and raised beds with seating

Garden
- Leave the south end of the garden basically as it is (maybe terraced)
- Add irrigation and a rainwater collection system, with water from the roof
- Add the primary outdoor kitchen space (near utility box)
- Nearby, add stadium-style seating for outdoor classroom use and kitchen
- North end of the garden (narrow planting strip) should include orchard trees and a “dry river bed” that comes out to the sidewalk (Dry creek theme continues around the corner to the planting strip on Grattan St.)
Courtyard
- Bike storage under the stairs in courtyard
- The word “H.O.P.E.” is written on the current large planting area

Grattan Street
Front “exploration area” (near Grattan Shrader)
- Exploration area should be a wildlife habitat with Native American themes. Habitat zone should be “pruned and pretty but wild and quiet”; make it a peaceful space to look for creatures
- Prune this area (trees) significantly to let in more light
- Add geology-themed boulders in a “dry creek” configuration
- Add a meeting circle in this space, close to the building’s main entrance (east side of planting strip)
- Winding pathway through the garden
- Water (cistern?) at west end near the Grattan/Shrader corner

Kindergarten ramp on Grattan Street
- Add a California-themed mural and dry river bed (taking up part of the ramp width?) with geology theme

Rooftop and building
- Idea to add solar panels and wind power to the roof
- Collect rainwater from the building’s roof and store it in cisterns somewhere onsite
- Add retractable awnings to help shield the classrooms facing south (along upper yard)
- Add solar powered night lighting (for aftercare)

Other ideas without a particular place on the map
- Add a “generic imagination station”
- For renewable energy system: add exposed dials showing energy use and production
- Add portable mats with games
- Add wood rounds for building, stepping, fantasy play
GRATTAN ELEMENTARY  
GREEN SCHOOLYARD - PROJECT SUMMARY

2006 PROPOSITION A BOND

In August 2008, the Grattan 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 enhance the existing schoolyard to create an even more engaging and ecologically-friendly environment for children to learn and play in.

The 2006 Proposition A Bond program is contributing $150,000 to "green" Grattan’s schoolyard. The concept design for this renovation is currently being developed by Grattan’s teachers and parents, with the assistance of master planning strategist Bay Tree Design, inc. This plan is intended to guide the future development of the school’s gardening program, outdoor classroom spaces, and play areas. This initial planning phase was completed in June 2009. In the next phase of the project, a local landscape architect selected by the school community will complete the design details and construction documents. The project will be constructed by contractors, with the help of the school community in 2011.

GREENING GRATTAN

This green schoolyard renovation process builds upon the ongoing Greening Grattan Project, founded in 2003. The mission of the Greening Grattan Project is: “to transform the school into a vibrant and healthy place in which our students are encouraged to play, learn and develop a genuine respect for each other, the community, and the natural environment.”

The Greening Grattan Committee invites you to join this exciting project!

OVERALL GOALS

The overall goals of this green schoolyard project are to:

- Connect curricula to the schoolyard landscape
- Include ecological & environmental systems in the schoolyard design
- Reduce asphalt
- Increase the variety of play options onsite
- Make the schoolyard more comfortable by adding shade, seating, & places to relax
- Reconfigure the schoolyard to add mounds or other landscape variations
- Improve schoolyard aesthetics

KEY PROJECT IDEAS

- Outdoor classroom seating
- Hill/variation in land form
- Pond or wetland habitat zone
- Outdoor cooking area
- Stormwater harvesting
- Quiet areas for relaxation
- Natural setting for learning and play
- Shady areas, out of the sun
- Bird habitat (plantings, houses, etc.)
- Places to dig and build
- Renewable energy system
- Outdoor artwork
- Imaginative play areas
- Native American study area
- Math/science study area
- Boulders for geology curriculum
The Grattan School community began a participatory schoolyard design process in August 2008 as part of the SFUSD 2006 Proposition A Bond’s Green Schoolyard Program. The goal of the green schoolyard planning 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.

1. PROJECT KICK-OFF

The Green Schoolyard project began with meetings with teachers and family members to discuss the idea of enhancing the schoolyard. Environmental planner Sharon Danks of Bay Tree Design, inc. led these meetings and presented schoolyard ecology slideshows to open the conversation and brainstorming sessions. The school community used these meetings to articulate their goals for the schoolyard’s future development and created a list of initial project ideas to be incorporated into the yard. The Greening Grattan Committee of parents and school staff also met during this time to discuss the school’s previous greening work, and ensure that this new project would mesh well with existing efforts.

2. SCHOOLYARD RESEARCH

In January 2009, the Greening Grattan 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 (left), ecology, existing uses for each area of the yard, and opportunities for improvement. The information gathered during this site walk was mapped so that it could be discussed in more detail at the design workshop.

3. DESIGN WORKSHOP

A large group of interested families and teachers met again in January 2009 to participate in a design workshop organized by Sharon Danks and facilitated with the assistance of Greening Grattan Committee members. At the workshop, the participants worked in small groups to create designs for the schoolyard. Each group developed their concepts based on the earlier site research and the goals that were developed at the kick-off meetings. The workshop ended with each group presenting their ideas to the others.

4. ACTIVITY ZONE DIAGRAM

After the design workshop, Bay Tree Design reviewed the school community’s ideas and combined them to create an Activity Zone Diagram, which was subsequently reviewed and refined by the Greening Grattan Committee, the principal, teachers, and families. The resulting diagram (above), approved in June 2009, 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 of the school grounds. The school community will now select a portion of this plan to implement with their bond funds, and will pick a landscape architect to help them flesh out the design in more detail.
This Agreement is dated for convenience XXXX 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 XXXX XX, 2011 and shall terminate on or before XXXX XX, 2013.

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

The Consultant shall be paid as per its proposal dated XXXXX 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 XXXXX 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
XXXXX 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**

________________________________________________________________________
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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<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):

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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>
<td></td>
<td><em>David Goldin, Chief Facilities Officer</em></td>
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</tbody>
</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.

To meet the DVBE program requirements, bidders must complete and fully document at least one of the following compliance options:

<table>
<thead>
<tr>
<th>Option A - Commitment to full DVBE participation</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Option B - Good Faith Effort</td>
<td>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>Option C - Business Utilization Plan</td>
<td>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 DVBEs 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.”

U.S. Small Business Administration (SBA)
Internet contact only – see instructions for website navigation
PRONET Database: http://www.pro-net.sba.gov
FOR: Service-Disabled Veteran-owned businesses in California
(Remember to verify each DVBE’s California certification.)

Local Organizations (see the DVBE Resource Packet available from DGS-PD DVBE Program Section listed below)
FOR: List of potential DVBE subcontractors

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

DGS-PD Office of Small Business and DVBE Outreach and Education
707 Third Street, 2nd Floor, West Sacramento, CA 95605
Voice, 8 am—5 pm: (800) 559-5529
Fax: (916) 375-4597
FOR: DVBE Program Participation Requirements
DVBE Program Info. and Statewide Policy
DVBE Resource Packet
DVBE Business Utilization Plan
Small Business/DVBE Advocates

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.
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>
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<th>DVBE Contact Name &amp; Reference #</th>
<th>Telephone Number</th>
<th>Fax Number</th>
<th>E-mail (if available)</th>
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- **☐ Yes**, I am, or I will subcontract with, the listed DVBE to provide the following goods and/or services:
  - Specific Goods and/or Services
  - Estimated $ and/or % Tier

  - $ / %

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

<table>
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<tr>
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- **☐ 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

  - $ / %

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

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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.

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<th>Date</th>
<th>Contact Name</th>
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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>Date</th>
<th>Contact Name</th>
<th>Telephone Number</th>
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<td>(916) 322-5060</td>
<td>(916) 375-4940</td>
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Describe Result

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

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<tr>
<th>Date</th>
<th>Internet Address</th>
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<tbody>
<tr>
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<td><a href="http://www.pro-net.sba.gov">http://www.pro-net.sba.gov</a></td>
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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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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)  Contact Name  Telephone Number ( )  Address  Date Ad Published / 

**Trade Paper Name** (list full name)  Contact Name  Telephone Number ( )  Address  Date Ad Published / 

☐ 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)  Contact Name  Telephone Number ( )  Address  Date Ad Published / 

Page 7 of 10
This document may be used as a continuation from Section A, STD 840 (REV. 9-15-2003)

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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

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

Date Contacted

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## ADDITIONAL DISABLED VETERAN BUSINESS ENTERPRISE CONTACTS


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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 5) 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