

Guidelines for Designer RFP (Request for Proposal) *Tucson HOA Landscape Transformation Program*

City of Tucson Water and University of Arizona/Pima County Cooperative Extension/Smartscape program have developed the Tucson HOA Landscape Transformation Program with the objective of *replacing high water-use plants and turf with desert-adapted and native low water-use plants*.

All HOA's are different due to acreage of the subdivision, number of units, age of the development and landscaping, available financial resources, specific challenges to be addressed, sophistication and technical expertise levels within the HOA, and levels of anticipated volunteerism.

Because of these differences, there is a wide range of options available to the HOA. Choices made from these options will impact the cost of both the design and implementation, the timing and phasing of construction, and the look and feel of the final product.

Integral to the success of the Transformation program is the **Landscape Designer (Designer)** to be selected by the HOA. These guidelines will discuss items to be considered and options available to the HOA and will provide an outline to assist the HOA in preparing an RFP that is in line with both the objectives of the HOA and the principles of the Smartscape program.

These Guidelines are to be used in conjunction with the RFP template that is **attached** to this document.

Role of the HOA board and the designated Champion.

It is assumed that at this point in the process *the HOA has applied for and been approved for participation in the Tucson HOA Landscape Transformation program*, so buy-in from the HOA board has been assured and there is at least a concept of the amount of vegetation to be transformed.

The next task will be for the board to appoint an **internal Champion** to oversee and drive the entire process. This role is different from that of the Designer and can be a board member, a community member, a committee, a hired project manager, or the property manager.

Responsibilities for the Champion role include:

Serving as the liaison between the HOA board, the community, the Designer, and the consultants and contractors involved in the process.

Gathering the materials that the HOA is providing to the Designer.

Evaluating options and framing recommendations to the board for the decisions needed to keep the process moving forward.



Process Options

There are several options available for how to perform the Landscape Transformation process. Decisions made on these options can have a significant impact on the project cost, schedule, and outcome. Items to consider in generating a Request for Proposal (RFP) for the Designer role include:

Goals. What does the HOA hope to accomplish? What are the challenges faced by the HOA that you desire to overcome with this process? Is it a reduction in irrigation water use, either volume or percentage, or is there a financial goal (operating budget savings)? Is there a new aesthetic with an associated plant palette envisioned? Is a pretty picture (conceptual plan) needed to generate support from the homeowners? Is a phased implementation plan needed for the purpose of budgeting the improvements over multiple years?

Answers to these questions should be built into the “Vision” or “Overview” section of the RFP to provide the future Designer some insight into the “why”. It’s likely that not all the answers will be known up front and that the design process is needed to get the answers. If so, then just say that in the RFP.

Budget. Has a budget for the design process been established? This would be with the Tucson Water HOA Landscape Transformation grant and other potential grants considered.

If the design budget range has been established, then it should be included in the RFP. If not established, and therefore dependent on the RFP respondents for next year budgeting, the HOA should be aware of the potential range of costs that may be proposed. Estimated ranges for the primary tasks are listed later in this guide.

The eventual cost of implementation will be determined by the Designer and the HOA working through the design process.

Phasing. The HOA should have an idea of what the transformation area within the community is going to be. This transformation can be implemented all at once or it can be broken down and programmed over multiple budget years (partial and incremental improvements). And it is likely that the design and associated cost estimates will be utilized to develop a phasing plan.

An option here would be to delineate a first phase demonstration or trial project for a portion of the total area that may be transformed.

Whatever the anticipated outcome, it should be articulated in the RFP.

Deliverables. There is a range of options and associated costs available to the HOA for the design process. Selection of how best to proceed is dependent on how far the HOA is already in the process, the



complexity of the challenges to be overcome, the level of in-house technical expertise, the level of HOA volunteerism that may exist, and the proposed budget, if known. The expectations for the deliverables should be clearly stated in the RFP. The options include:

Initial Consultation. This would entail a meeting or series of meetings to identify issues and expectations. The result could be a report providing guidance to the HOA on how best to proceed. It could include examples of plant palettes, potential phasing, potential costs, and basic techniques for implementation. It could also possibly include how to provide the needed base map of existing conditions.

Existing conditions/base map. The Designer will require a visual representation of the starting conditions to know the starting point of the transformation and to know the constraints that will impose on the final design. Ideally this will be in an electronic format, but paper copies are acceptable if that is all that's available.

Concept Design Plan. There are a couple of options to be considered for this item.

It can be a pretty picture if this is needed to present to the community for outreach and buy-in for the program.

Or it could also be a site specific plan that shows generally what plants can go where within the community and how the finished landscape may look. This could then be used to create a phased implementation plan with associated costs, that could be managed internally and self-implemented using volunteers, the landscape maintenance contractor, or other landscape contractors. This option would generally not include, unless specifically requested, specifics on irrigation modifications, utility coordination, grading modifications, or rainwater harvesting.

Community Outreach and Consensus. The extent of this program will vary widely depending on where the HOA is in educating the community about and obtaining buy-in for the transformation process. The other variable is whether the HOA board can and will conduct the process internally or they contract it out to the Designer.

Final Design Plans and Construction Documents. With this option the Designer prepares a final detailed design, based on the Concept Plan, and accompanying Construction Documents (CD's). It will include specifics on what, where, and how and would include, where applicable, requirements for utility interfaces, grading and drainage, rainwater harvesting, and irrigation modifications or upgrades. It should also include detailed cost estimates for implementation. These CD's can then be put out to bid to the contractors selected by the HOA or recommended by the Designer or the management company.

This option allows for detailed phasing and programming over multiple budget years.

Design/Build. With this option a single entity performs both the design and construction tasks. As a result, there is a single point of contact throughout the process and generally a single fee negotiation. It provides some cost certainty earlier in the process, subject of course to construction surprises or HOA initiated changes.



As a general note, the farther down the options listed above in this section you select, the more precise the cost estimates for implementation will be.

Professional Requirements. Multiple levels of professional credentials exist, each with associated benefits and risks/costs. The HOA should determine which option is best suited for their needs and approach, and articulate it in the RFP.

RLA. This is a licensed *Registered Landscape Architect*, regulated by the AZ Board of Technical Registration. RLA's have proficiency in all aspects of landscape design, including utilities, grading, soils, and irrigation in addition to their knowledge of plants and trees. An RLA is more appropriate for challenging environments and situations. They carry professional liability insurance and E&O (errors and omissions) insurance and are generally more expensive than non-licensed designers.

Licensed Contractor. Contractors are required to obtain a license from the AZ Registrar of Contractors and carry a performance bond. They are cognizant of regulatory requirements. Design/Builders should carry this license to protect the public from non-performance.

Designer. This is a nebulous category. Anyone can call themselves a Designer and there are several Associations that issue credentials that sound official but are not regulated by any public entity. While there are many talented and experienced Designers in the market, there are also many that are not. They may or may not carry covering insurance. This is a buyer-beware category, and references and demonstration of experience are vital and should be required in the RFP package.

What can the HOA provide to minimize Designer Fees?

Experience has demonstrated that there are two tasks where the HOA can significantly reduce the Designer fees and accelerate the design process.

Existing Conditions/Base Map. The Designer will need to have a base map, preferably in an electronic format, in order to do an evaluation and an eventual design. This base of existing conditions should show existing landscape, trees, irrigation components, drainage patterns, hardscape, and other pertinent elements.

If the Designer has to compile all of this information from archive files and public sources with minimal input from the HOA, they will charge a significant fee.

Whatever the HOA can compile for transmittal to the Designer will reduce the fee for this task. Aerial photos, Final and Tentative Plats, Grading Plans, design plans or as-built drawings of the irrigation system, and the Tucson Water plans for the community are all needed if they exist and can be found.

Some basic data is provided in the Audit performed by Tucson Water. The community's archive file can be searched. Some of these items are accessible from the county's public records and GIS.



So, in summary, the more that the HOA can provide, the less the fee charged by the Designer will be.

Community Outreach/Buy-in. The cost for this item varies depending on where the HOA is in the process. Defining the community's *challenges and concerns* relative to water and landscaping is the starting point. Determining and evaluating the *available opportunities* follows. Determining the community's *desired aesthetic* for the transformation and then obtaining *consensus* for it will follow.

All of these are essential steps and all can be facilitated by the Designer. Alternatively, *the HOA can self-perform some of these tasks*, with or without guidance from the Designer. At a minimum the Designer should be contracted to provide some options for the new landscape aesthetic.

It's up to you (individual HOA).

Not everything described in this Guide and the accompanying Template is necessarily needed by every HOA. Each HOA can customize the program to balance their own challenges and objectives with their own capabilities and resources. Depending on the situation, a Concept Design may be all that's needed for implementation. It's up to the individual HOA to determine what best suits their circumstances.

Something to consider.

Irrigation system replacement, repair, and/or re-configuration is likely to be a major and expensive and disruptive part of the transformation. A couple of options to consider:

No irrigation. Turn off the irrigation and allow the volunteer native plants to take over, assisted by water harvesting and maintenance techniques.

Minimal irrigation. For turf areas, overseed with a native seed mix and allow that to take over as the turf dies out. This requires minimal irrigation until the natives get established and then none, as the vegetation will be supported by rainfall.

Fee generalizations.

Due to the variable nature of HOAs and their challenges and opportunities, it is difficult to estimate fees for the different components. Some generalizations can be offered for guidance, however. These generalizations, with the exception of the design/build option, apply only to the Designer selection and do not address construction costs or options.

The more that the HOA can do or provide, the less the Designer will charge to do it for them. If the Designer has to manage the HOA as well as the project, they will either build it into their fee or charge an extra.

The more complex the area and the challenges are and the more complex the desired outcome, the more the Designer will charge. Specifically, this applies to irrigation modifications and rainwater harvesting (active or passive) design. The offset to this will be the benefit of reductions in water use, water cost, and required maintenance efforts over time.

A Design/Builder may result in an overall project cost reduction. When a single entity does both design and construction, they may charge less upfront for design and make it up on the back-end implementation and construction.

Estimated fee range by deliverable (for an average subdivision).

Initial consultation. Meet with HOA representative, review issues and opportunities, review available existing conditions information, discuss desired outcomes, review potential plant palettes. This particular task may be incorporated into one of the following tasks.

\$2,000-3000

Existing conditions/base maps. Assuming minimal input from the HOA and an average sized subdivision.

\$4000-6000

Community Consensus/buy-in. This includes identifying issues, concerns, and expectations, developing preliminary landscape concepts, presenting them to the community, and facilitating a consensus as to the preferred option. Prepare preliminary implementation cost estimates for a cost/benefit analysis.

\$8000-9000

Concept Design Plan. A plan showing demolition limits, new plantings, proposed irrigation modifications, rainwater harvesting opportunities, and any new hardscape requirements. This item is highly dependent on the area to be transformed. It can be used to develop an implementation plan phased over several budget cycles.

\$6000-10,000

Final Design/CD's. This is entirely dependent on the size of the area to be transformed and the complexity of the changes. It is impossible to estimate a fee range without a concept plan and a phasing plan.

Landscape Transformation Designer RFP Template.

[Attached]



Designer RFP **Template**

Tucson HOA Landscape Transformation Program

Overview.

Describe the subdivision (address, acreage, number of units, age, and any history or aesthetic that should be honored). Attach a photo, copy of the plat or a site plan to show the project limits.

The stated goal of the Tucson HOA Landscape Transformation Program is to replace high water-use turf and plants with desert adapted and native low water-use vegetation.

The **subdivision name** Board of Directors desires to transform the Association's existing landscaping by adapting Smartscape water conservation strategies including strategic plant selection, best maintenance practices, passive and active water harvesting, and smart irrigation design.

The objective of this RFP is to identify and select the Landscape Designer who will provide the blueprint/map for this effort as directed by the **HOA Board or their designated Champion/representative**. (It is preferable that the Board designates a champion to drive the process on behalf of the Board).

Program Description.

In this section describe the "why" and the "how" (if known) in order to provide guidance for the future Designer.

The strategic goal of this transformation is to better manage the Association's operating and maintenance costs by reducing high water-use areas, thereby reducing overall water usage and maintenance requirements while transforming the existing landscaping to a vibrant and sustainable aesthetic.

Goals. Describe any specific goals that are desired, such as known challenges to be overcome, desired reductions in water use (either percentage or volume), financial objectives, or a desired aesthetic (if known; if not known, say so).

Budget. Provide an anticipated Budget for the Designer and design process, if known. This should include the Tucson Water grant. If the eventual budget is not known and is dependent on the results of this effort, say so.

Be aware of the potential range of fees for Design services, as listed in the Guidelines. Also be aware that the eventual implementation costs are not known at this point and will be dependent on the design process.

Phasing. Is a pilot or demonstration project anticipated? Is the entire community or a select area being considered for transformation? Is the plan to phase the design and/or implementation over multiple budget years?

Project Approach. Briefly describe the desired option to be used for the transformation design and implementation, using the guidance from the Guidelines. These range from a *Concept Design Plan* for community outreach and volunteer implementation to *Final Design Plans and Construction Documents*, phased or not, to a *Design/Build* contract.

Program Guidelines.

The Designer will incorporate Smartscape principles (summary **attached**) into the final product.

Qualifications and Experience of the Designer.

In this section detail the required credentials, qualifications, and experience that should be included in the response. Select the appropriate option and delete the other categories if not applicable.

Registration as a **Landscape Architect** with the AZ Board of Technical Registration is preferred but not required.

Landscape Designers should provide their certifications and credentials.

Landscape Contractors and Design/Builders should provide their license number with the AZ Registrar of Contractors.

Preference will be given to Designers and design teams where at least one member has a Certificate of Completion from the Smartscape program. **This requirement is preferred but not required for Registered Landscape Architects.**

Provide the qualifications and the certifications and licenses of the firm and the key individuals on the project team.

Provide project examples that demonstrate the experience of the Designer and the firm in landscape and irrigation design, with an emphasis on water conservation and sustainability. Provide Designer's history of working with HOAs and other public groups.

Proposal Guidelines and Process.

Proposals can be in any format as long as experience, qualifications, and fees are clearly stated. There is no page or word limit but brevity is appreciated.

Include a statement about adherence to this RFP and the Scope of Services with any qualifiers or exceptions specified.

Proposals are due **xx/xx/xx**. Email, postal delivery or in-person delivery are all acceptable. Delivery will be to:

HOA contact person

Phone

Email

There is not a set schedule to award but the selection and award process is anticipated to take about **xxxx** months from the proposal submittal date.

A site visit prior to proposal submittal can be arranged by contacting **HOA contact** as listed above.

Questions concerning this Request for Proposal can be directed to **HOA contact** as listed above.

Scope of Services.

Specify what the anticipated end products will be, using the *Project Approach, above*, and guidance provided in the Guidelines for Implementing the HOA Transformation Program (**attached**) to help with the descriptions.

Potential tasks could include, depending on the HOA's objectives, *the Initial Consultation, a Base Map of existing conditions, a Community Outreach Program, a Concept Design Plan, a Final Design with detailed Construction Documents, or a fully implemented project, phased or not, under the Design/Build option.*

Delete the tasks below that are not applicable to the desired approach.

Provide a fee for each task. Fees are to be **lump sum** unless otherwise specified. *Fees can be Lump Sum, Time and Materials, or Time and Materials, Not to Exceed.*

Initial Consultation. The Designer will meet with HOA representatives (**specify number of meetings**) to identify community issues and program expectations.

The Designer will produce a report providing guidance for how to proceed. This could include *examples of plant palettes, potential phasing options, potential costs, and basic techniques for implementation.*

Existing Conditions. Provide a baseline inventory and base drawing of existing landscape plantings, turf areas, irrigation components, hardscape, drainage patterns, and other pertinent elements.

The community will provide **??? plats, water plans, Tucson Water audit, anything??** See Guidelines for Obtaining Existing Conditions Documents (**attached**).

Community representatives will assist the Designer in identifying and locating pertinent infrastructure.

Community Consensus. The Designer will work with the community in a facilitated manner to define the community's goals and desired design aesthetic. A designated community representative will

be the liaison between the design team and the community and will be responsible for communications to and from the community.

The design team will conduct *one scoping meeting* with the designated community representative and then *two community meetings* and will provide supporting exhibits as necessary for each. The first community meeting will be to present concept options which will facilitate a consensus on a desired design concept. The second community meeting will be to present a preliminary design for final refinement.

Provide a fee for the above with an option for additional services for additional presentation meetings with the community or the Board if requested.

Concept Design Plan. Provide a drawing (hard copy and PDF) of the selected concept option. Describe the desired product, either a visual rendering of the recommended palette to be used for community outreach and consensus, or a site specific plan with a finished look that can be used for phasing and self-implementation.

Final Design Plans and Construction Documents. Provide a drawing (hard copy and PDF) of the final *Planting Plan*. This plan will identify, at a minimum, all proposed plant species, locations, sizes at installation and maturity, irrigation requirements, passive water harvesting opportunities, and new hardscape requirements. This plan will also show possible phasing and sequencing options with cost estimates for major phases and constructed components.

The *grading, passive water harvesting, and hardscape* elements can be separate exhibits but are required as components of the Master Plan.

Demolition Plan. Provide a drawing (hard copy and PDF) detailing by phase existing plantings, turf areas, irrigation infrastructure, hardscape, or anything else that will be removed for the transformation process.

Irrigation Plan. Provide a plan detailing proposed irrigation components needed to support the zoned and phased Planting Plan. Water conserving design and component specification is mandatory. Smart technologies are preferred.

Meetings. The design team will meet with the community representative for plan review and progress approvals at mutually agreed upon intervals. Provide a *budgeted fee allowance (T&M with a Not to Exceed upset)*.

Design/Build Option. The Designer will also be the Contractor for the implementation of the Final Design. Provide a fee for the full service, turn-key design and implementation of the transformation project.

Optional Services

The following will be considered as optional services if requested by the community.

Maintenance and Monitoring Plan. This is another available option at the discretion on the HOA board. Provide a Guide (Word) for monitoring and maintaining the completed landscape and irrigation designs. This document will incorporate best practices, including Smartscape principles, adapted for the transformed *HOA name* landscaping design. This document is intended to be incorporated into future landscape maintenance contracts for the community. This document will be the final project deliverable, due after the community accepts the final Design documents.

Supplemental Presentation Materials. This is for any materials requested beyond those required for the Community Consensus task. Examples could include 3D visualizations or modeling, permanent displays, or presentation of specialized concepts.

Active/Passive Water Harvesting Plan. Provide a plan for either active or passive water harvesting that includes essential elements for collection, storage, and distribution. For Active this will include a connection to the transformed *HOA name* irrigation system. Provide a guide for the monitoring and maintenance of this system.