# HOA Landscape Transformation Program Phases and Timeline

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# Phase 1: Program Information & Education - Application

STEP 1	STEP 2	STEP 3	STEP 4
Smartscape for HOAs course - Interested parties learn more about the program	Application - Interested parties gather their water consuption report and board approval to apply, and apply	- Smartscape reviews all the applications for the cohort	Letter of Understanding - Smartscape shares their decision with HOAs and TW sends the Letter of Understanding

STEP 1:	Interested parties attend the Smartscape 2- or 3-part <b>Smartscape for HOA course</b> Because processing may take a few weeks, interested parties should request their Consumption Report ASAP, even before taking the HOA course	
STEP 2:	<ul> <li>HOA board or authorized representative gather needed documents:</li> <li>Consumption Report from Tucson Water</li> <li>Proof of board approval to apply for the program</li> <li>And complete the HOA Landscape Transformation application</li> </ul>	3 months
STEP 3:	Smartscape reviews all the applications for the cohort, informs TW	
STEP 4:	Smartscape shares their decision with HOAs TW sends the Memorandum of Understanding	1 month





# Phase 2: Discussions, Consensus, Planning & RFP

STEP 1	STEP 2	STEP 3
<b>Project Manager/</b> <b>Champion</b> <b>selection</b> - Regular Cohort Meetings start	Community Discussions, Consensus Building & Planning - HOA board collects information from their community and build concensus to inform their RFP	<b>Request for Proposal</b> - Write the Request for Proposal

STEP 1:	HOA board chooses a project champion or hires a Project Manager (PM) **Monthly cohort meetings start here	
STEP 2:	Smartscape leads the <b>Community Consensus workshop*</b> Champion, PM, and HOA board use the Smartscape Community Survey to collect community wishes to inform their design goals and create consensus in their community, Smartscape assists <u>NOTE</u> : some design firms will do more planning and consensus building as part of their design work	3 months
STEP 3:	Smartscape leads the <b>Request for Proposal workshop*</b> Champion/PM writes the RFP, Smartscape reviews and assists	1 – 3 months







# Phase 3: Designer Selection

STEP 1	STEP 2	STEP 3
<b>RFP Distribution</b> - Create short list of designers, verify, possibility to bid out	- Negotiate deliverables, Review contracts, Assure undersatnding	Design Plans - Concept or Detailed Plan, Production schedule, Phasing, Payment schedule - Request reimbursements from TW

STEP 1:	Champion/PM creates a short list of designers they wish to work with. They distribute the RFP and follow up with designers to maximize RFP responses	1 month
STEP 2:	Champion/PM receives bids. Smartscape helps review bids. Negotiation over RFP is possible Champion/PM selects the designer they wish to work with	1 – 2 months
STEP 3:	Smartscape leads the <b>Working with Designers workshop*</b> Consultations and site visits by design team Designer produces deliverables, these may include Concept or Detailed Plan, Production schedule, Phasing plan <u>NOTE</u> : As noted in Phase 2 Step 3, some designers may do more community demo/input/feedback Champion/PM requests reimbursements from Tucson Water following guidelines in MOU	4 to 12 months (depending on size and scope of work)





#### Phase 4: Installer Selection & Installation

# **STEP 1**

STEP 2

#### Installation

Selection This may be the same as Designer if Design/Build firm

Builder/Installer/

Contractor

Create short list, verify, negotiate deliverables, Review contracts, Assure undersatnding

Track progress to ensure performance targets and expectations are met

STEP 1:	Smartscape leads the <b>Working with Builder/Installer workshop*</b> If designer is not a design/build firm: champion/PM creates a short list of installers/contractors they wish to work with. They distribute the RFP and follow up with designers to maximize RFP responses **Monthly cohort meetings end here	1 month
STEP 2:	Champion/PM tracks Installation progress to ensure performance targets and expectations are met **Progress report is done by email or online form	Dependent on scope and phasing



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#### Phase 5: Landscape Maintenance

STEP 1	STEP 2
<b>Measurement</b> - Monitor water use	<b>Maintenance</b> - Maintain Sustainable
	Landscape

STEP 1:	Smartscape leads the <b>Working with Landscape Maintenance contractor workshop*</b> Champion/PM requests a water consumption report yearly. Smartscape compares water consumption report for up to 5 years (until the landscape is deemed "established" and establishment irrigation is no longer needed) Smartscape compares pre-installation water consumption to post-installation, post-establishment period water consumption.	Establishment = 2 to 5 years
STEP 2:	Maintenance of the landscape follows Smartscape principles (as described in Smartscape Maintenance Manual)	Continuous

\*Workshops and courses are written in bold. These are intended to take place during the monthly cohort meetings. If needed, additional meetings can be scheduled to accommodate these.



