

PUBLIC SPACE

**STEWARDSHIP
GUIDE**

VERSION 1

APPENDIX B CREATING THE MANAGEMENT PLAN

APPENDIX B

CREATING THE MANAGEMENT PLAN

This Appendix includes a set of ready-to-use templates, which will assist public space managers in creating a plan that includes the components outlined and defined in Appendix A: Management Plan Components.

TABLE OF CONTENTS

PUBLIC SPACE MAP	B3
DEFINING USE LEVELS	B3
Use Level Definitions	B4
STAFFING SERVICES	B5
MAINTENANCE SERVICE FREQUENCY SCHEDULE TEMPLATES	B5
Hardscape: Heavy Use	B6
Softscape: Heavy Use	B7
Hardscape: Moderate Use	B8
Softscape: Moderate Use	B9
Hardscape: Light Use	B10
Softscape: Light Use	B11
MAINTENANCE SERVICE CHECKLISTS	B12
BUDGET TEMPLATES + HOW TO USE THEM	B13

PUBLIC SPACE MAP

What should this map look like?

The Public Space map should communicate key information, such as:

- Current photos of public space
- Urban context: bordering streets, buildings, land uses, landscaping, etc.
- Location of or access to electrical outlets
- Access to water spigots, drains
- On-site equipment storage (if applicable)
- Special considerations for utilities, Public Utilities Commission, SFMTA, etc.
- Event or programmatic performance space/stage (if applicable)
- Designated equipment load-in and load-out pathways

DEFINING USE LEVELS

How do I identify the use level and needs of the public space?

Public spaces have a variety of maintenance considerations and needs, and there is no one formula for determining the needs of your space. Indeed, the needs may shift during certain times of year (for example, you may see heavier use in the summer months than in the winter). Even so, there are a number of basic principles and considerations that public space managers can use to determine use level and maintenance needs for their space.

The templates presented in this section are designed to help public space managers determine their site-specific maintenance frequencies, the estimated staff needed to provide those services, and an estimated cost to maintain and staff their public space.

In order to determine maintenance cost estimates and staffing needs, you must first determine how the project site is used on a daily basis.

A few guiding questions to consider:

- Are there people frequently using or passing through the site?
- Is the site next to major generators of pedestrian foot traffic, such as a transit stop, large office building, or educational/cultural institution?
- Is it a passive recreational site, or an active recreational site?
 - Passive recreation refers to activities that do not require prepared facilities (like sports fields or pavilions). Passive recreational activities place minimal stress on a site's resources. Examples include sitting and observing nature or street life, walking, or picnicking.
 - Active recreation refers to structured individual or team activity that requires the use of special facilities, courses, fields, or equipment. Examples include baseball, soccer, tennis, or bocce ball.
- Does the site regularly feature events, or pick-up games?
- Does it have elaborate landscaping that requires special care?
- Is the site rich in amenities, such as tables and chairs, bike racks, bike repair stations, water fountains, etc.?
- Is there generally trash or refuse in or around the site?

With these questions in mind, review the use level definitions on the following page, describing conditions for heavy, moderate, and light use of hardscape and softscape elements. As a reminder:

HARDSCAPE = Impermeable surface features (sidewalks, pavement, concrete)

SOFTSCAPE = Greening elements (plants, trees, greenery). Also often referred to as softscape.

USE LEVEL DEFINITIONS

Note that use levels for hardscape and softscape may not be the same. For example, your public space may have heavy use in hardscape areas, but light use for softscape!

HEAVY USE

HARDSCAPE

Hardscape features are considered to be in “heavy use” if they require:

- » Daily cleaning and inspection, including sweeping, tidying, and removing pavement stains.
- » Inspection of fixtures, furniture, and equipment daily, weekly, monthly, or semi-annually (frequency depends on amenity type)

SOFTSCAPE

Softscape features are considered to be in “heavy use” if they require consistent services throughout the week, or full service softscape management, including:

- » Turf care: mowing, trimming, fertilizing, weed control
- » Small tree, shrub, and ground care: pruning, edging, pest and weed control
- » Irrigation systems management and repair
- » Material procurement and delivery
- » Trash removal

MODERATE USE

HARDSCAPE

Hardscape features are considered to be in “moderate use” if they require:

- » Cleaning five days per week, including sweeping, tidying, and removing pavement stains.
- » Inspection of fixtures, furniture, and equipment twice weekly, weekly, monthly, or semi-annually (frequency depends on amenity type)

SOFTSCAPE

Softscape features are considered to be in “moderate use” if they require twice weekly to monthly services, including:

- » Turf care: mowing, trimming, fertilizing, weed control
- » Small tree, shrub, and ground care: pruning, edging, pest and weed control
- » Irrigation systems management and repair
- » Material procurement and delivery
- » Basic softscape maintenance: tidying, light pruning, planting
- » Horticultural consultation

LIGHT USE

HARDSCAPE

Hardscape features are considered to be in “light use” if they require:

- » Twice weekly cleaning services, including sweeping, tidying, and removing pavement stains.
- » Inspection of fixtures, furniture, and equipment weekly, monthly, semi-annually, or annually (frequency depends on amenity type)

SOFTSCAPE

Softscape features are considered to be in “light use” if they require weekly, monthly, or annual services, including:

- » Irrigation systems management and repair
- » Material procurement and delivery
- » Basic softscape maintenance: tidying, light pruning, planting
- » Horticultural consultation
- » Pest control
- » Weeding

STAFFING SERVICES

Depending on your space’s needs, you may need to engage staff or volunteers in filling a number of key roles. This section outlines definitions for four standard staffing service areas, also referenced in the budget templates that appear later in this Appendix.

Janitorial/Custodial

Responsible for ensuring the project site is cleaned, tidied, and well-maintained. This role also serves as a type of soft security for the project site.

Engineer

Responsible for safely maintaining the physical condition and appearance of the project site. Duties also include inspecting, repairing, and maintaining the project’s hardscapes, water or electrical infrastructure.

Gardener

Responsible for cleaning, planting, tidying, pruning, and maintaining any landscaping within the project site.

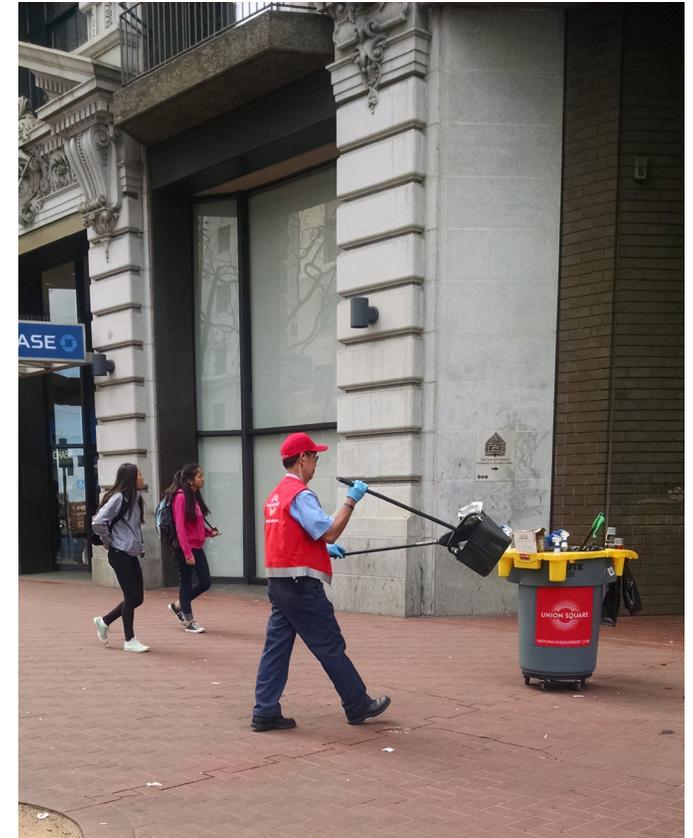
Management & Coordination

Responsible for hiring and managing the project site’s required services and personnel, as well orchestrating any additional programming and activation activities to take place on site.

MAINTENANCE SERVICE FREQUENCY TABLE TEMPLATES

The service frequency templates and checklists on the following pages provide baseline recommendations for care of softscape and hardscape areas within each use level category. These templates should serve as a starting point for service frequency planning for your project site. Note that you should expect to adjust your plan as you see how it performs. You may, for example, begin with “light use” softscape maintenance frequencies, and then decide you need to scale up into the “moderate” category. Information in the templates will also likely need to be adjusted to respond to variations in climate. Note that these modifications should err on the side of increasing the baseline service frequencies recommended in the templates, not decreasing them.

It is assumed the softscape and hardscape services will be provided in accordance to the manufacturer’s specifications, by a professional custodian or janitor, a licensed engineer, and/or trained gardener.



San Francisco’s Union Square BID provides cleaning and maintenance services within the district through the Clean and Green Program.

BUDGET TEMPLATES + HOW TO USE THEM

Like the service frequency templates and checklists on the previous pages, the budget templates were developed with options for each softscape and hardscape use level. To use the budget templates, select the use level category appropriate for your public space and move through the calculations. The budget you create from these templates will provide you with a starting point for understanding the cost of maintaining your public space. Note that you may need to adjust the budget aspects of your plan as you see how it performs.

SOFTSCAPE MAINTENANCE BUDGET TEMPLATE

Measure the total square footage for softscape areas within the project site. Use the total project softscape square footage, multiply by the price per square foot, add an additional contingency, and the result is the total annual rate to maintain the softscape elements of the project site.

SOFTSCAPE MAINTENANCE BUDGET TEMPLATE			
USE LEVEL:	HEAVY	MODERATE	LIGHT
Price per square foot per year	\$ 0.94	\$0.66	\$0.46
Contingency (15%)	\$0.14	\$.10	\$0.07
Annual Rate	\$1.08	\$0.76	\$0.53
Softscape square footage			
Water (\$.015 per sq. ft.)			
ANNUAL TOTAL			

HARDSCAPE MAINTENANCE BUDGET TEMPLATE

The totals below reflect the estimated number of hours for janitorial or custodial work to keep the site in neat appearance, and engineer hours to address any complex issues, should they arise.

HARDSCAPE MAINTENANCE BUDGET TEMPLATE			
USE LEVEL:	HEAVY	MODERATE	LIGHT
JANITORIAL/CUSTODIAL			
Wage*	\$35	\$35	\$35
Hours/week	10	4	2
Hours/year	520	208	104
Subtotal	\$18,200	\$7,280	\$3,640
ENGINEER			
Wage*	\$150	\$150	\$150
Hours/week	0.76	0.40	0.15
Hours/year	40	21	8
Subtotal	\$5,928	\$3,120	\$1,170
Contingency (15%)	\$3,619	\$1,560	\$722
TOTAL	\$27,747	\$11,960	\$5,532

*Includes overhead and benefits costs

TEMPLATE FOR PROGRAMMING AND EVENTS

The budget template below provides a baseline for calculating estimated costs associated with hosting events at the public space site. Estimates are based on projected number of attendees and event duration. Note that costs and impact on the public space may also be dependent on square footage of space. Line items include staff time to help coordinate and organize the event, janitorial hours to clean the project site during and after the event, artist or performer expenses, and food truck rental costs. Your event may require additional categories, but this template will provide a starting point.

The Template includes a recommended fee for future capital improvements. The fee, based on a percentage of total programming costs, should be a percentage determined by the public space manager.

PROGRAMMING AND ACTIVATION BUDGET TEMPLATE			
PROPERTY IMPACT LEVEL:	HEAVY	MODERATE	LIGHT
Est. # of attendees	100+	30-100	10-30
Duration of event (hours)	6 - 8	4 - 6	1 - 4
MANAGEMENT AND COORDINATION			
Hourly Rate	\$40	\$40	\$40
Estimated Hours	11	8	4
Subtotal	\$440.00	\$320.00	\$160.00
JANITORIAL AND CUSTODIAL			
Hourly Rate	\$35	\$35	\$35
Estimated Hours	11	7	4
Subtotal	\$385	\$245	\$140
PERFORMER/ARTIST	\$750	\$400	\$400
EQUIPMENT	\$400	\$250	\$100
STEAM CLEANING	\$400	\$300	-
FOOD CART/TRUCK	\$1,500.00	-	-
SUBTOTAL	\$3,875.00	\$1,515.00	\$800.00
Capital Imp. Fee (est. 5%)	TBD	TBD	TBD
Contingency (15%)	\$581.25	\$227.25	\$120.00
EVENT TOTAL	\$4,456.25	\$1,742.25	\$920.00

ADDITIONAL CONSIDERATIONS FOR PROGRAMMING AND EVENTS

The following page provides a sample event intake form. This form is a template for the baseline data public space managers should obtain to understand potential impact of an event on the property. Context (such as size of the property, whether the areas are hardscape or softscape, etc.) will also determine the impact, but this template will provide a starting point. For large events, it may be helpful to obtain an impact analysis by a trained property professional from a management company.

If the project site will be used frequently for events and activation, develop a list of restrictions or guidelines in order to protect the site. These guidelines should reflect the character of the neighborhood or community. Examples include:

- Restrictions on food set-up and distribution (Coordinate with Health Department regulations)
- Required event stop or “quiet” times (Ex: No events later than 8 PM)
- Restrictions around potential trip and/or fire hazards (Ex: Power cords or cables cannot be placed across the public ROW)
- Rules around staking of tents, or use of stages or other structures

When hosting an event in your public space, be sure to:

- Inspect and record the condition of the project site before and after the event
- Notify neighbors
- Ensure a Damage Waiver Responsibility is signed and documented
- Meet Insurance Requirements – at least \$1,000,000 additional liability

Event Day and Date: _____

Event Purpose: _____

Circle One: Private Open to the Public

Event Start Time: _____ Event End Time: _____

(Events will be permitted only until 10:00PM; Sound is permitted only until 9:00 PM)

Total Number of Attendees: _____ #Adults: _____ # Children: _____

Contact: _____

Telephone: _____ FAX: _____

Areas of Space Requested for Use:

(Description) _____

Client Status: (circle one) Non-Profit Community Corporate Media

Type of Event: (circle all that apply)

Breakfast/Brunch Lunch Dinner Reception

Still Photo Shoot Film Shoot Meeting Performance

Equipment and Services: (circle all that apply)

Tenting: Quantity: Size(s): Install Where? _____

Tables: Quantity: Size(s): Install Where? _____

Chairs: Quantity: Install Where? _____

Stage: Quantity: Size(s): Install Where? _____

Water Key: Quantity:

Power:

(Description) _____

AC _____

Generator _____

Lighting _____

Stage Décor: _____ Props (list types): _____

Parking Requested: Yes/No Which St? _____ How many spaces: _____

How will this event be promoted?

(Description) _____

Load In:

Hardscape or Softscape

Trucks/Vehicles entering property (describe #, size, weight)

(Description) _____

Food Yes/No (Circle one)

Food Type _____

Cooking Methods _____

Caterer or Food Vendor/s (Circle one)

Food Vendors/Booths _____

Security required: Yes/No (circle one)

Janitorial required: Yes/No (circle one)

Engineering required: Yes/No (circle one)

Addition Equipment On-Site:

Submittal Date: _____ Submitted By: _____ Title: _____

Maintenance Service Frequency Schedule

HARDSCAPE: HEAVY USE	Daily	X/Week	X/Month	X/Year	As Needed	Additional Comments
CLEANING						
Sweep and tidy appearance	X					
Remove pavement stains	X					
PAVEMENT						
Inspect		X				
Repair					X	
Preventative Maintenance			X			
SPECIAL PAVERS						
Inspect	X					
Repair					X	Address Immediately
Preventative Maintenance			X			
BIKE RACKS						
Inspect	X					
Repair					X	Address Immediately
WALLS AND SURFACES						
Inspect	X					
Touch-up/repaint					X	
Apply protective coatings and sealants				2X		
FURNITURE						
Inspect	X					
Repair					X	Address Immediately
Preventative Maintenance		X				
LIGHTING AND ELECTRICAL						
Inspect				4X		
Replace bulbs					X	
Clean			X			
Repair					X	
Routine Maintenance		X				
PLUMBING						
Inspect drains		X				
Test backflow device			X			
Inspect water meters	X					
Inspect water pumps	X					
Service water pumps	X					
SIGNAGE						
Inspect	X					
Repair					X	Address Immediately
HARDSCAPE PLAY AREAS						
Inspect	X					
Repair					X	Address Immediately
WOOD STRUCTURES/SURFACES						
Inspect	X					
Repair					X	
Apply protective coatings and sealants				X		

Maintenance Service Frequency Schedule

SOFTSCAPE: HEAVY USE	Daily	X/Week	X/Month	X/Year	As Needed	Additional Comments
LAWN CARE						
Leaf litter removal		2x				
Clipping removal	X					
Tidy appearance	X					
Hand weeding		X				
Irrigation system programming	X					
Irrigation system check		X				
Fertilize				4x		
Pest control		X				
Mow		X				
Edge		X				
Aerate				4x		
Re-seed					X	
ANNUALS, PERENNIALS, AND GROUND COVER CARE						
Leaf litter removal		2x				
Clipping removal	X					
Tidy appearance	X					
Hand weeding		X				
Irrigation system programming	X					
Irrigation system check		X				
Fertilize				4x		
Monitor for pest control		X				
Prune			X			
Edge			X			
Cultivate				4x		
TREE AND SHRUB CARE						
Leaf litter removal		2x				
Clipping removal	X					
Tidy appearance	X					
Hand weeding		X				
Irrigation system programming	X					
Irrigation system check		X				
Fertilize				4x		
Monitor for pest control		X				
Prune			X			
Edge			X			
Cultivate				X		
Inspect	X					
ADDITIONAL CONSIDERATIONS						
Site inspections		X				
Landscape report			X			
Irrigation report		X				
Soil moisture checks		3x				
Soil compaction test				4x		
Clean valve boxes				X		
Equipment cleaning		X				
Mulch replenishment			X			

Maintenance Service Frequency Schedule

HARDSCAPE: MODERATE USE	Daily	X/Week	X/Month	X/Year	As Needed	Additional Comments
CLEANING						
Sweep and tidy appearance		5x				
Remove pavement stains		2x				
PAVEMENT						
Inspect		X				
Repair					X	
Preventative Maintenance				4x		
SPECIAL PAVERS						
Inspect		2x				
Repair					X	Address Immediately
Preventative Maintenance				4x		
BIKE RACKS						
Inspect		2x				
Repair					X	Address Immediately
WALLS AND SURFACES						
Inspect		2x				
Touch-up/repaint					X	
Apply protective coatings and sealants				X		
FURNITURE						
Inspect		2x				
Repair					X	Address Immediately
Preventative Maintenance			2x			
LIGHTING AND ELECTRICAL						
Inspect				4x		
Replace bulbs					X	
Clean			X			
Repair					X	
Routine Maintenance			2x			
PLUMBING						
Inspect drains					X	
Test backflow device				4x		
Inspect water meters			X			
Inspect water pumps			X			
Service water pumps			X			
SIGNAGE						
Inspect		2x				
Repair					X	Address Immediately
HARDSCAPE PLAY AREAS						
Inspect		2x				
Repair					X	Address Immediately
WOOD STRUCTURES/SURFACES						
Inspect		2x				
Repair					X	
Apply protective coatings and sealants				X		

Maintenance Service Frequency Schedule

SOFTSCAPE: MODERATE USE	Daily	X/Week	X/Month	X/Year	As Needed	Additional Comments
LAWN CARE						
Leaf litter removal		2x				
Clipping removal		2x				
Tidy appearance		2x				
Hand weeding		X				
Irrigation system programming		X				
Irrigation system check			X			
Fertilize				4x		
Pest control			X			
Mow		X				
Edge		X				
Aerate				4x		
Re-seed					X	
ANNUALS, PERENNIALS, AND GROUND COVER CARE						
Leaf litter removal		2x				
Clipping removal		2x				
Tidy appearance		2x				
Hand weeding		X				
Irrigation system programming		X				
Irrigation system check			X			
Fertilize				4x		
Monitor for pest control		X				
Prune			X			
Edge			X			
Cultivate				4x		
TREE AND SHRUB CARE						
Leaf litter removal		2x				
Clipping removal		2x				
Tidy appearance		2x				
Hand weeding		X				
Irrigation system programming		X				
Irrigation system check			X			
Fertilize				4x		
Monitor for pest control		X				
Prune				X		
Edge			X			
Cultivate				X		
Inspect		2x				
ADDITIONAL CONSIDERATIONS						
Site inspections		X				
Landscape report			X			
Irrigation report			X			
Soil moisture checks		2x				
Soil compaction test				4x		
Clean valve boxes				1x		
Equipment cleaning					X	
Mulch replenishment				6x		

Maintenance Service Frequency Schedule

HARDSCAPE: LIGHT USE	Daily	X/Week	X/Month	X/Year	As Needed	Additional Comments
CLEANING						
Sweep and tidy appearance		2x				
Remove pavement stains					X	
PAVEMENT						
Inspect			2x			
Repair					X	
Preventative Maintenance				4x		
SPECIAL PAVERS						
Inspect			2x			
Repair					X	Address Immediately
Preventative Maintenance				4x		
BIKE RACKS						
Inspect		X				
Repair					X	
WALLS AND SURFACES						
Inspect		X				
Touch-up/repaint					X	
Apply protective coatings and sealants				X		
FURNITURE						
Inspect		X				
Repair					X	Address Immediately
Preventative Maintenance			X			
LIGHTING AND ELECTRICAL						
Inspect				4x		
Replace bulbs					X	
Clean			X			
Repair					X	
Routine Maintenance			X			
PLUMBING						
Inspect drains					X	
Test backflow device				2x		
Inspect water meters			X			
Inspect water pumps			X			
Service water pumps			X			
SIGNAGE						
Inspect		X				
Repair					X	
HARDSCAPE PLAY AREAS						
Inspect		X				
Repair					X	Address Immediately
WOOD STRUCTURES/SURFACES						
Inspect		X				
Repair					X	
Apply protective coatings and sealants				X		

Maintenance Service Frequency Schedule

SOFTSCAPE: MODERATE USE	Daily	X/Week	X/Month	X/Year	As Needed	Additional Comments
LAWN CARE						
Leaf litter removal		2x				
Clipping removal		X				
Tidy appearance		X				
Hand weeding			X			
Irrigation system programming			2x			
Irrigation system check				6x		
Fertilize				4x		
Pest control			X			
Mow		X				
Edge			X			
Aerate				4x		
Re-seed					X	
ANNUALS, PERENNIALS, AND GROUND COVER CARE						
Leaf litter removal		X				
Clipping removal		X				
Tidy appearance		X				
Hand weeding					X	
Irrigation system programming			X			
Irrigation system check			X			
Fertilize				4x		
Monitor for pest control			X			
Prune			X			
Edge			X			
Cultivate				4x		
TREE AND SHRUB CARE						
Leaf litter removal		X				
Clipping removal		X				
Tidy appearance		X				
Hand weeding		X				
Irrigation system programming			X			
Irrigation system check			X			
Fertilize				4x		
Monitor for pest control		X				
Prune				X		
Edge			X			
Cultivate				X		
Inspect		X				
ADDITIONAL CONSIDERATIONS						
Site inspections		X				
Landscape report				4x		
Irrigation report				4x		
Soil moisture checks		X				
Soil compaction test				4x		
Clean valve boxes				X		
Equipment cleaning					X	
Mulch replenishment				4x		Or as needed