



Engaging Landscape Maintenance: Protecting Common Area Improvements

January 11, 2010

Early this month, I wrote a three-part series to help people understand how to hire a landscape maintenance company. There were two versions of each part: a long version, reproduced here and on the blog, and a shorter version trimmed to meet the requirements of the published newspaper column.

The series has been very popular, and so I have put all of the pieces together into a single PDF. Please feel free to copy and share this document. I only ask that you share it entirely, including the headers and footers that identify MSADesign, Inc. And while I want to see it get wide distribution, MSA does hold the rights to this document. Don't reproduce it or quote it without attribution, please.

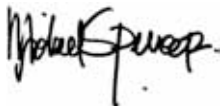
This is NOT a set of specifications. It is a guide to help people understand a little more about the process of hiring landscape maintenance companies.

Of course, MSA Design is in the business of design, and one of the services that we offer is the preparation of maintenance specifications unique to your project. We also offer assistance in the process of selecting bidders and managing the bid process, and we can help you determine a realistic budget. We look forward to an initial, no-cost consultation and the opportunity to provide a proposal. Reach us from the web, or by email, or by phone (239.598.2828).

And, did you know that I am available to make presentations to your HOA or committee? There are several interesting topics. Of course there is no cost. These presentations are very well received, and usually focus on the importance of common area improvements in protecting property values.

Now, let's get to work...

Very Truly Yours,



Michael Spencer MLA ASLA
MSA Design, Inc.

Part 1: Property Values, Due Diligence, and Why it Matters



Well. Here we are in the new year: as soon as Santa clears the chimney, HOA presidents are busy calling those joyful general meetings!

I know, though, that some HOA residents look forward to these sessions. It's an opportunity to learn what is going on in the community and how the Board of Directors is spending money. Their money.

I've made a number of presentations at these annual soirees, and never tire of them. Why? Because what I have to say about the role of common area

improvements in protecting property values gets the audience attention, that's why. This is simply something that a lot of people haven't completely thought out. When I explain to them that every failing shrub drains value from homes and, more directly, money from each pocket, they start to take landscape maintenance a lot more seriously.

■ What Is Due Diligence?

Most people at least vaguely know the term 'due diligence'. This is an interesting phrase that, perhaps, came into common parlance after the passage of the Securities Act of 1933. The Act simply stated that securities brokers were not liable for advice if they perviously exercised 'due diligence' in examining the security and the underlying company, and if they disclosed the result of this investigation to the buyer of the securities. Translation: find out everything you can and then tell your client.

The term has broader meaning.

Frequently, we are called upon by real estate investors or developers to assist them as they work through their due diligence on a piece of real estate representing a potential investment. Our part of the process is simply to assure them that the number of units they used on their Excel spreadsheets would actually fit on the property, and that the resultant design made sense in the current market: that the arrangement of units and streets results in a competitive site plan. Sometimes, our part of the work extended to constructing budgets based on the site plan.

So, the term simply means that one learns everything one can about an issue in advance of actually exposing oneself to risk.

In the case of hiring landscape maintenance contractors, here is what I have observed over the course of 28 years: due diligence is almost never fully completed. Read that again. In fact, I see irresponsible activity over and over at communities all over Florida, mostly the fault of ignorance, but expensive nonetheless.

■ Why We Plant

One more thing to keep in mind, especially for the flood of new winter residents, is this:

The purpose of common area improvements is to support property values, plain and simple.

Yes, it's fun, and it's cool to be green. It is even cooler when your property values are high and stable. Plantings represent a huge capital expense. Maintaining this investment is fiscal responsibility.

And when you realize that many communities have huge amounts of planting and other improvements, it's all the more shocking. A responsible Board simply would not fail to escrow funds for paving or paint or a myriad of other necessary maintenance items. But consider this: while a community can easily have \$250,000 in landscape improvements—and sometimes, more, a lot more—the process for protecting and nurturing these assets is frequently managed very poorly, to the point that the health of the assets is seriously and continuously compromised.

Why does this happen? Several reasons, I think, largely stemming from ignorance. But that's another post.

Let's take a look at several big parts of the landscape maintenance contractor selection puzzle that will help you complete your due diligence. These parts are simple: first, we will talk about how to pre-qualify your potential contractors. Then, we will discuss the issue of landscape specifications, and finally, a short discussion of what to expect from a maintenance contractor, including warranties.

Keep in mind that these principals apply to your single family home as well as to the very large community.

■ Contractor Pre-Qualification

Before even thinking about taking prices, you need a list of qualified companies. The notion is that you would be willing to contract any company on the list if successful in pricing.

Why do this first? A couple of reasons. First, don't bother wasting your time and the time of any company you wouldn't engage. Secondly, there is much to be learned from investigating these companies, information about the specific company, yes, but also about your project and your process.

Sometimes, communities simply open the yellow pages and ask companies to 'bid'. Seriously. This happens.

It's not hard to understand, really, because the Landscape Committee isn't populated usually by professionals. Most of the time, these committees are people with a long interest in plant material, although frequently it's material from 'up north'. Sometimes, a committee member will have taken some local educational courses, which can be quite helpful.

But most of the time these are willing and hard-working people who have no way to know who they should even consider to maintain the grounds, and the yellow pages is about the only place they can go.

This is a mistake because we don't know if each company can actually do the work. Remember that anyone with a pickup truck can be a landscape contractor. This isn't necessarily a bad thing, as there are many gems out there.

How do you figure this out? You need recommendations and sample projects, and you must meet the players and talk to clients. It's not that hard. Contact the sub-communities that might be adjacent to yours. Call other HOAs. Call the Club Manager at other communities for referrals. Do your due diligence.

Part 2: Meet the Players, and Pre-Qualification



We started the process of building a qualified list of landscape maintenance contractors in Part One.

We learned that landscape maintenance is one of the biggest line items that any HOA must face. For homeowners, it's also a very large number, often several hundred dollars per month. The pressure to reduce the cost is huge. The problem, though, is that without knowledgeable

care, plant material will decline, often gradually; a community can lose huge amounts of plants simply by favoring 'low-cost' bidders over the course of a few years. making the selection of landscape maintenance contractors absolutely critical.

Last week, we started talking about how to make your list of candidate maintenance contractors, and discussed why this is done: essentially, you want to limit the firms you get prices from to those with who you would be willing to contract. Don't waste your time on anyone else. Secondly, the process will help you focus on exactly what is needed.

I'll finish the discussion on pre-qualification in this post. I'll cover the issue of Landscape Maintenance Specifications in Part Three in a day or so.

And now, let's expand a bit.

■ Meet the Players

At least one local and very capable company insists on using a sales staff. The sales staff approach is fine, initially. But don't even think that your due diligence is complete until you meet the key players. Who will be the foreman? Who is the foreman's person's boss? Will the foreman be on your site at all times when there is work underway? What is his cell number?

Are the people representing the company out-going and friendly? Did they keep the appointment on time? Did you get very full explanations for questions? Did you notice any defensiveness? Did anyone say anything derogatory about other companies? How long have they been with the company? Where did they get an interest in horticulture? Where did they get training?

And more: ask each candidate to address a specific issue you have on your site. It's not a test, people. It's just a way to learn what they know. And, what you know. Expect them to be smart.

There are several very large maintenance companies around the two counties, all driving new trucks and pulling shiny and newly-painted trailers. This is new. We haven't seen large and well-capitalized companies operating in this market before. Don't think, though, that shiny equipment is sufficient to earn a place on your list. It is not.

Be sure that each candidate company comes to you by way of recommendation—and limit yourself to four or five candidates. Why? Because it's enough already! And because evaluating these companies is a lot of work.

■ Don't Be Obtuse

There is nothing to be gained by anything less than full engagement with every candidate. These guys are experts and they deserve your respect. Don't be coy with what you want. This is not a test. The best projects benefit when the Owner respects the provider and nurtures a sense that there is a team at work trying to do the best job they can do.

Similarly, I've had HOAs refuse to tell me the budget that they have available for design work out of fear that the process would 'spend all of the money'. This isn't productive. Business is based on *trust*; if you don't trust your contractors, then don't hire them. You needn't reveal your maintenance budget in advance, of course, but do be open with everyone and answer all questions fully.

■ Project Evaluation

As you move towards finalizing your list of possible companies, move to the next step. Ask to see two or three current projects from each. Go to all of them, and with the entire committee. And don't look at these projects from behind the wheel. Get out and look.

Yes, they will send you to their best projects. No, they won't tell you about any problem projects—we all have one of those, and no wish to advertise them. But it doesn't matter. There are things you can't hide.

While you are poking around, you will see people on each project. Talk to them. Ask about how each company operates, how responsive they are, how it is working with them.

If you see any issues, ask the candidate about it: "Why is the grass so brown over on Project B?" A possible answer: "Because we didn't notice a problem with the irrigation system". This would be a bad answer.

Or, they could say: "We killed that grass because we are replacing it due to a major insect infestation". See what I mean? Lots of times there are good reasons for things. Ask and learn.

■ Here Come Da Judge

What's that? You say you don't know if the maintenance is good because you can't tell if the plants are healthy or not? Because you are not a horticulturist? Because you are a volunteer with limited experience?

I know that.

Here are a few simple things to look for:

Turf usually occupies the most area on a project, so start there. Is it uniform? Is it green? Do you see weeds or brown spots or disease? Is the color uniform? Does it get sufficient water? Look closely at the blades: any curling indicative of water stress? Is the mowed length uniform? Look at the cut edges of grass. Anything other than a clean and even cut indicates mower blades not

properly sharpened and the grass blades are being torn, allowing a place for bad things to enter the tissue.

Then, shrub pruning: is everything 'buzz cut', or is it natural looking? Perhaps your community wants boxed hedges—or not. Have a look. Most of the time, though, boxed hedges means poorly trained staff.

Do you see weeds in the planting beds? Or in the sod? Find out why. Depending on how long since last treatment, any weeds more than 3" tall are a bad sign.

Do you see clean edging, including on the inside of shrub beds?

Look for disease. Just about anyone can recognize disease: dropping leaves or mold or insects or whatever is quite obvious. Look for any discoloration on the leaves. Look to the overall form of the plant. Example: If you see *Ixora* (*Ixora* spp.) covered with black stuff, find out why. If in doubt, get an expert. Any disease at all is very bad and must have a very good explanation.

Look at the plants again: are the leaf sizes consistent? We want to know if the plants are stressed. Do you see healthy plants with leaves over the entire shrub, or do you see a plant that has 'self-pruned', leaving bare twigs near the ground? Look at the back of the leaves, too.

Take pictures. Use your pictures to ask follow-up questions of the candidates.

Remember that the maintenance contractor can't control bad design, so you may see plants in spots that don't support healthy growth. Most of the time, this is either light or water related. Solution: ask them. Get a clear explanation.

Don't assume anything. Expect to learn and to be surprised.

An important thing to keep in mind: a sorry-looking site does not always mean poor maintenance techniques. Perhaps the provider started work on this site recently. Perhaps there is so little money available that the owners have given limited direction. There are a lot of questions to ask.

By now you have between 3-5 possible contractors that you can use. Your work isn't over yet, though.

You thought this would be easy, right? Well, it is not easy, but it is straightforward. Your job is to maintain plant material systems that are worth a very large pile of money. It's serious business.

Next, I'll have a look at putting together Landscape Maintenance Specifications.

I'll continue and finish this article in Part 3.

Part 3: “Say What You Want”: Specifications



You’ll remember that the three most important parts of selecting a landscape maintenance contractor are:

First, recognize the value of landscape improvements, both to the extent that they support property values, and the cost of replacement;

Pre-qualify a list of perhaps 4 or 5 contractors. These are companies that you

have researched, and you would be willing to contract any of them should the price be right; Prepare Landscape Maintenance Specifications to use as you get prices and to make certain you get comparable prices.

In Parts One and Two of this series, we talked about valuing existing improvements, and we talked about how to generate a ‘Bid List’ through pre-qualification.

■ Heavy Lifting

It is simply the case that many communities allow each contractor to ‘self-specify’: this is a process where the provider tells you what he thinks you need, rather than you telling him what you want. And most of the time, you are at a disadvantage, because committees often lack deep expertise.

It’s like standing there in your community, opening you arms wide, and asking “How much?” It’s stunning, really. What are you people thinking out there?

The actual dollar amount of installed landscape improvements is very often very much more than anyone imagines. Many projects have more than \$250,000 (or more, sometimes much, much more) on plantings and irrigation.

And then you hire just anyone? Is this clear thinking?

No, it is not.

I am pulling my hair just thinking about it.

First of all, you cannot get comparative prices unless you tell each company exactly what you want, and they all price exactly the same thing.

Second, the process so far has allowed you, the Owner, to think very hard about exactly what is wanted. This is good.

Remember: this is a very technical endeavor, people! You cannot expect good results without specifications.

Yes, there are those naysayers out there who think that cutting the grass and buzzing the shrubs is work best left to a simpleton.

They are wrong.

And in the end, they will pay for this wrong thinking with dead plants. Dead, expensive plants. Now: the maintenance world is full of very qualified professionals. And like just about every endeavor, it is also full of dunces. We want to sort them out, don't we?

The landscape professionals will appreciate a full and complete set of maintenance specifications: I have never had a company show anything but appreciation when they are asked to incorporate our specifications. However, do remember this: qualified providers bring a lot to the table. They bring experience and practical knowledge. This means that when I prepare a set of specifications, I realize that it will be necessary to make revisions and additions before the final contract because the successful contractor will help you to improve. This happens after the pricing phase, because the pricing must be based on exactly equal specs.

■ What's In, What's Out

What should your specs include? Your specs can be professionally drawn (this is a one-time expense), or, with sufficient experience and expertise they can be internally generated.

I have been toying with the idea of posing a set of sample specifications here. There are pluses, and minuses, to doing this: the main negative is that I would have to make them uselessly general. So, I've decided to simply summarize, the idea being that the enlightened user will know that many sections need amplification, some a lot of amplification. Of course, there is a standard way to organize these specifications; specs in any area of construction, including framing, and concrete, for example, all have the same form. However, the main thing here is to get the necessary items into the contract.

So, here we go:

■ Part 1: General Conditions *describe the work.*

General Conditions include the project name, contact people, Landscape Architect, Landscape Contractor, and any other relevant players. Also include a description of the site, the limit of work, and just about anything else that is peculiar to your site.

Include a list of the specific work, like mowing, pruning, weed control, fertilizer application, irrigation maintenance, sweeping, etc.

Describe how to handle discrepancies, what the role of the LA will be, expectations on protecting your property.

Describe the warranty: it is assumed that the project and all of the plants are healthy. Anything dies, the contractor pays for it. Period.

Talk about insurance requirements, indemnification, etc.

■ Part Two: Execution explains *how you want the work done.*

Here is where you can get specific about what you want, including at least:

Hours of work: do you want blowers at 7 AM or anytime on Sunday?

Expectation that the contractor will provide qualified people. Describe this: you want them to be experienced in upscale horticultural maintenance.

Work schedule: how frequently do you want the crew on site? How often so you want the grass cut? Should shrubs be trimmed every week, every month, what?

Notification of chemical application and fertilizers is absolutely essential. You must have several days' notice. In some cases you will want sufficient notice to place a comment in the community online presence. Lots of people walk dogs. I tried walking my cat but this didn't work out.

■ Taking Care of the Grass

Specify the kind of turf you have. Most of the time, this will be all St. Augustine 'Floritam' or a similar variety, but you might have Bermuda, Zoysia, Bahia, Centipede, or Paspalum in some areas.

Specify the actual amount of sod on the site so that everyone prices the same amount. This can be done by using aerial photos. You can contact me for the source of these scaled documents.

You only have to do this once, thankfully.

How high do you want to maintain the grass? This is very important because it can radically affect the prices you will receive, and it will vary by the type of grass you have. Scalping is very bad because it allows pathogen entry. A good rule of thumb: when you mow, remove about one third of the height. If you want 4" grass, mow when it is 6" high. Remember: photosynthesis, and plant health, is proportional to the aggregated leaf area.

Some of the available Florida grasses will produce flowers, and mowing is conducted chiefly to remove seed heads. This is especially true of the slow growing Centipede and Bahia.

What about grass clippings? You almost always want the clippings left on the mowed grass. Research has shown that these clippings readily decay and contribute to available nutrients. Thatch build-up isn't an issue with properly mowed and healthy grass.

■ Pruning

List every single species and describe how you want it pruned: yes, every single species. Don't be shocked. How else can you say what you want? Example: Say you have Firebush (*Hamelia patens*) in very large drifts. You could say this: 'Firebush is to be maintained at a height of X± feet, and is never to be sheared. Allow a loose feeling. Do not prune this shrub immediately prior to flowering.'

Similarly, list all of the trees. Usually the maintenance people handle pruning they can reach from the ground. If you have particular trees with special needs, call them out. Patio trees in particular are important. If you have, say, *Ligustrum*, talk about how much clear trunk is to be maintained. And do you want them sheared into a ball, or do you want an open and natural look? You can look for Doug Caldwell's shade tree pruning publications.

Palms, too: talk about when to prune palm fronds, and how much you want them pruned. Again, link to Doug Caldwell's excellent work is a good idea because palms are frequently over pruned.

Talk about each type of palm: Royals, Sabal, Foxtail, whatever you have. The slow-growing natives are particularly vulnerable: Thatch Palm (*Thrinax radiata*) and others are good examples.

■ **Fertilization and Weed/ Pest Control**

Get very specific here. Name the products and the application rates. Talk about fertilizer frequency, note compliance with any applicable fertilizer ordinances. Do you want to buy the material and have your provider apply it? Or do you want them to buy and apply? Do you want to see the empty bags, or an invoice, or some other indication that the material was actually used? Point out your lake and swale areas and how these will require special handling. What about plants that residents may have planted in common areas?

Mulch is a huge expense. I've written many times that mulch is not only over-used, but has become required in many planting beds because of poor design or poor plant spacings. Nonetheless, a certain amount is needed. What color? If you insist on Odious Red, say it, although I remind you that mulch is nothing more than a necessary evil. It is NOT a design element. Also: how deep? How do you handle replenishment through the year? When do you do an annual replenishment? Do you want to provide the material, or do you want your provide to do it? And again here, do you think you need some assurance that the amount of mulch you paid for is the amount that is on the ground? This isn't an issue of dishonesty: the idea here is simply to be sharp about it.

■ **Irrigation Maintenance**

Tell them how much they can spend without approval. Give them an emergency phone number. Remind them that if anything dies, they pay. Define 'routine maintenance'. Note that anything broken during mowing is to be repaired by the contractor and that he is to use identical equipment. This is important—don't mix Toro with RainBird, for example.

■ **Warranty**

The assumption is that you are handing over your property with everything in good health. If plants die, the maintenance contractor is responsible for replacement with a similar size. This needs careful definition obviously, storm damage isn't his fault. But loss due to poor irrigation or due to disease is defiantly his fault. How much damage must occur before you want a plant or tree replaced? Remember, your HOA is not in the nursery business, nor is it in the plant hospital business. ALL plants are to be vigorous and healthy at ALL times.

Certainly common sense prevails here: there is naturally a period of transition as your new provider gets settled in. How long is this period? Who makes final decisions about plant replacements?

And, don't be a tough guy. Sometimes, plant material dies of natural causes. Be fair.

■ **What Now? Back to the Future...**

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Of course, MSA Design is in the business of design, and one of the services that we offer is the preparation of maintenance specifications unique to your project. We also offer assistance in the process of selecting bidders and managing the bid process, and we can help you determine a realistic budget. We look forward to an initial, no-cost consultation and the opportunity to provide a proposal. Reach us from the [web](#), or by [email](#), or by phone (239.598.2828).

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