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PURPOSE

The purpose of this documentation is to explain the process to track the Joint Use Program with San Diego Unified School District (District).

SCOPE AND END RESULT

This process is applicable to the Parks and Recreation Department (P&R).

The Tracking Sheet Update is updated annually and reported to the Public Safety and Livable Neighborhoods (PS&LN) Council Committee. The Tracking Sheet Update is posted to the P&R's Joint Use Webpage.

RESPONSIBILITIES


P&R Asset Management Project Officer II (P&R Project Officer): Is responsible for performing a secondary review of the Tracking Sheet Update for accuracy.

P&R Budget Supervising Management Analyst (P&R Analyst): Receives a copy of the Tracking Sheet Update for other department needs.

P&R Director: Is responsible for approving final Tracking Sheet Update before it gets posted on the P&R Webpage.

P&R Play All Day Joint Use Coordinator (Preparer): Is responsible for coordination with the District, execution of Joint Use Agreements and renewals and updating the Tracking Sheet Update.

SDUSD Real Estate Supervisor (District Contributor): Is responsible for execution of Joint Use Agreements for SDUSD and renewals and updating the Shared Tracking Sheet.

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DEFINITION(S)

Council Policy 700-35: Council policy on the development of the City's Joint Use Program with school districts. This policy establishes the guidelines for the administration and operations of the City's joint use programs in conjunction with the Memorandum of Understanding between City of San Diego and San Diego Unified School District and serves as guidance with the City's Joint Use endeavors with other school districts.

Joint Use Agreements: A written agreement between a public agency such as the City of San Diego and a school district such as San Diego Unified School District setting forth the terms and conditions for sharing the use of recreational facilities.

Joint Use Facility: The shared or joint use of recreational amenities to maximize the use of public facilities and resources.


Joint Use Program: The City and San Diego Unified School District have been cooperating since 1948 in the shared use of numerous Joint Use Facilities to meet the recreational and educational needs of the communities that both agencies serve. Comprehensively this is called a Joint Use Program.

Memorandum of Understanding between City of San Diego and San Diego Unified School District: Agreement between City of San Diego and San Diego Unified School District outlining the development and maintenance of joint use facilities.

P&R's Joint Use Webpage: City webpage dedicated to information regarding the City's Joint Use Facilities with School Districts. <https://www.sandiego.gov/park-and-recreation/parks/jointusefacilities>

Play All Day (PAD) Joint Use Program: The Play All Day Initiative expands the Joint Use Program by adding another 40-45 Joint Use Facilities in the next 5-10 years.

Shared Tracking Sheet: Shared working document Google doc spreadsheet that includes the following data points about each City Joint Use Facility with San Diego Unified School District:


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School Name, Joint Use Facility Name, Location, Community Planning Area, Property Ownership, Number of Acres, Agreement Start Date, Term of Agreement, and Agreement Expiration Date.

Tracking Sheet Update: An annual update of the Shared Tracking Sheet that is uploaded onto the P&R's Joint Use Webpage and presented to Council Committee.


PROCESS

- 1.1. As Joint Use Agreements are executed or renewed, the District Contributor enters updated project information into the Shared Tracking Sheet, which is a District document that is shared with select City staff via Google Docs. The Shared Tracking Sheet is not a public document; only invited City and District staff have read/write access to the shared Google Doc. The District Contributor as the originator has final approval over all edits to the Shared Tracking Sheet. The District has the primary responsibility to enter data into the Shared Tracking Sheet throughout the year and the City verifies the data every year when the Tracking Sheet Update is prepared.**C6**
- 1.2. The Preparer posts all newly executed Joint Use Agreements to the City website when the wet signed copies are received.
- 1.3. At biweekly PAD meetings, the Preparer reviews agreements that are nearing expiration or would be cancelled. The parties will honor the terms of expired Joint Use Agreements until the parties agree to either discontinue joint use at the facility or renew the Joint Use Agreement for another term.**C1**
- 1.4. Annually in September, the Preparer initiates a Tracking Sheet Update.
 - 1.4.1. The Preparer performs a check of the Shared Tracking Sheet. The Preparer reconciles the information against the new and renewed Joint Use Agreements that were executed and any new Joint Use Facilities that opened to the public since the last Tracking Sheet Update was issued. The Preparer coordinates with

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the District Contributor if any discrepancies are identified. The Preparer then formats a draft Tracking Sheet Update for internal review.**C2,C7**

- 1.4.2. The Preparer sends an email to the P&R Analyst and P&R Project Officer requesting their review and approval of the draft Tracking Sheet Update.
 - a. The P&R Analyst reviews the draft Tracking Sheet and reply all to the email approving the draft Tracking Sheet Update.**C3**
 - b. Then the P&R Project Officer reviews and approves the draft Tracking Sheet via a reply all email.**C4**
- 1.4.3. Once the draft Tracking Sheet Update has been reviewed and approved by the Reviewers, the Tracking Sheet update is sent via email to the Director for approval.
- 1.4.4. The P&R Director approves the Tracking Sheet Update via email.**C5**
- 1.4.5. The Preparer formats and prepares a PDF of the Tracking Sheet Update suitable for uploading to the P&R's Joint Use webpage.
- 1.4.6. The Preparer submits a Website Update Requests via the P&R Information Systems Resources page, at <https://cityhub.sandiego.gov/dept/prkrec/SitePages/Information%20Systems%20Resources.aspx> requesting that the Tracking Sheet Update be uploaded to the P&R's Joint Use Webpage replacing the previous Tracking Sheet on the webpage.
- 1.5. Annually in October, the Preparer prepares an OnBase Informational Item to a Council Committee. The Preparer will target the October PS&LN Council Committee meeting for this update. The Staff Report will detail the Play All Day Joint Use Program implementation progress. The Tracking Sheet Update will be included as an attachment.
 - 1.5.1. The Preparer references Council Policy 700-35 for department responsibilities managing and reporting on the Joint Use Agreements with school districts.

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POST PROCESS REVIEW

The P&R Project Officer is responsible for ensuring that the Preparer initiates the Tracking Sheet Updates and provides an Informational Item update to PS&LN Council Committee every year that includes the Tracking Sheet. Copies of the reports and Tracking Sheet Updates will be saved on the P&R Shared Drive for at least 10 years.


REFERENCE(S)

[Audit Report 19-016](#), "Performance Audit of the City's Administration of Joint-Use Agreements with San Diego Unified School District"

[Council Policy 700-35](#) Joint Use Facilities with School Districts


Glossary of listed terms in this process can be accessed on CityNet ([PN Glossary](#))

Memorandum of Understanding between City of San Diego and San Diego Unified School District for Development and Maintenance of Joint Use Facilities ([PDE](#))

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CONTROL POINT(S) AND MEASUREMENT(S)

Control Objective	Risk	Control Activity	Ref	Key Control	CT	CM	CC	F	FS
To provide reasonable assurance that the information reported in the Tracking Sheet upload matches the information in the Shared Tracking Sheet.	Agreements that are nearing expiration or would be cancelled are continued without review.	P&R Play All Day Joint Use Coordinator reviews agreements that are nearing expiration or would be cancelled.	C1	Key	V	M	P	BW	A,C,U
	Incorrect or incomplete information is used in the Tracking Sheet upload.	P&R Play All Day Joint Use Coordinator reconciles the Shared Tracking Sheet with the PAD Implementation Schedule and the new Joint Use Agreements.	C2	Key	R	M	P	A	A,C,U
		P&R Budget Supervising Management Analyst reviews and approves the draft Tracking Sheet.	C3	Key	V	M	P	A	A,C
		P&R Asset Management Project Officer II reviews and approves the draft Tracking Sheet.	C4	Key	M	M	P	A	A,C
		P&R Director reviews and approves the draft Tracking Sheet.	C5	Key	M	M	P	A	A,C
Access is restricted to authorized personnel.	Unauthorized access to view or alter information within the system.	Read/write access to the Shared Tracking Sheet on Google Docs is by invitation only for City and District staff.	C6	Key	S	A	P	SY	
		Shared drive – Access to the Department of Parks and Recreation's network and shared drives are restricted to authorized	C7	Key	S	A	P	SY	

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		users through network folder rights provisioning.							
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L E G E N D	Control Type (CT)	Control Method (CM)	Control Category (CC)	Frequency (F)	Financial Statement Assertion (FS)
	A – Authorization C – Compliance M – Management Review R – Reconciliation S – System Control SA – Safeguarding of Assets SD – Segregation of Duties V – Review and Verification	A – Automated M – Manual	D – Detective P – Preventative	D – Daily W – Weekly BW – Bi-weekly M – Monthly Q – Quarterly S – Semi-Annual A – Annual BE – Biennial T – Transactional SY – System	A – Accuracy and Classification C – Completeness E – Existence and Occurrence R – Rights and Obligation U – Cutoff V – Valuation and Allocation