

## Application for Planning Group Recognition

Submitted by: Anonymous user

Submitted time: Dec 21, 2023, 12:01:30 PM

What is the official name of your Planning Group?

**Uptown Planners**

What community/planning area(s) are you establishing a Planning Group for? Click here to open the Community Planning Area Map

- **Uptown**

Are you an existing Planning Group that was established prior to September 13, 2022?

**Yes**

What Council District(s) is your Planning Group located in? Click here to open the Council District Map

- **3**

Indicate here if you propose to have more than 20 CPG Members.

**No**

How will your Planning Group be accessible to all members of your community?

**A statement re: accessibility is appended to the downloaded Participation & Representation Plan.**

How will your Planning Group fairly represent all members of your community?

**A statement re: representation is appended to the downloaded Participation & Representation Plan.**

Applicant Representative

**Lu Rehling, Chair, Operations & Outreach Committee, Uptown Planners**

Email

**lurehling@gmail.com**

Phone Number

**650-208-8678**

Please include the following documents.

**DOCX** Uptown-COMMPARTREPPLAN.docx  
27.2KB

**DOCX** Uptown-DEMOGRAPHICS\_docx.docx  
12.4KB

**DOCX** Uptown-OPERATING\_PROCEDURES.docx  
69.4KB

# UPTOWN PLANNERS MEMBER COMPOSITION\*

## Race

- 12\_ White
- 1\_ Two or more races
- 1\_ Other

## Household Income

- 3\_ \$30,000 to \$44,999
- 2\_ \$60,000 to \$74,999
- 3\_ \$75,000 to \$99,999
- 3\_ \$100,000 to \$149,999
- 1\_ \$150,000 to \$199,999
- 2\_ \$200,000 or more

## Community Affiliation

- 9\_ Homeowner
- 3\_ Renter
- 2\_ Local Business Owner or Operator

## Age

- 2\_ 30 to 39
- 2\_ 40 to 49
- 1\_ 50 to 59
- 3\_ 60 to 69
- 5\_ 70 to 79
- 1\_ 80 +

\*Anonymous survey conducted when Uptown Planners had 14 board members.

**OPERATING PROCEDURES**  
**Effective Upon Recognition by City Council in 2024**  
**UPTOWN PLANNERS**  
**Community Planning Group of the City of San Diego**

**Introduction and Background**

Through these Operating Procedures, Uptown Planners, a community planning group, adopts Council Policy 600-24's Terms and Conditions attachment. In the Terms and Conditions, the City established minimum standard procedures that planning groups will adhere to and designated services that planning groups will provide in order to obtain and maintain official recognition by the City pursuant to [Council Policy 600-24](#). Planning groups are independent organizations voluntarily created and operated by community members who are not City employees, City agents, or City representatives. Planning groups are not City-controlled or managed organizations. The City does not direct or recommend the election, appointment, or removal of planning group voting members nor delegate authority to planning groups to act on the City's behalf.

Uptown Planners, in adopting these Operating Procedures, commits to meeting these minimum standards and to operating in a manner that abides by and conforms with the Brown Act, is transparent to the public, is accessible to and inclusive of all community members, and reflects the diversity of the communities where it operates. Uptown Planners acknowledges that meeting the standards of this document is necessary to be formally recognized, and continue to be recognized, by the City Council as a planning group in the City of San Diego. Uptown Planners acknowledges that the City Council can revoke recognition of any planning group if the City Council, in its sole discretion, determines these standards are not being met.

Uptown Planners also submits, as Exhibit C, a Community Participation and Representation Plan and will maintain this document in accordance with sections 2.5 and 7.2 of these Operating Procedures. Uptown Planners also incorporates ethical standards in these Operating Procedures.

In consideration of [Council Policy 600-24](#) and its attached Terms and Conditions, Uptown Planners hereby agrees to abide by the following as its Operating Procedures.

**1. Name and Geographical Boundaries**

The name of this City recognized Community Planning Group shall be Uptown Planners.

The community planning boundaries of Uptown Planners are the boundaries of the Uptown Community, as shown in Exhibit A.

**2. Responsibilities**

2.1 Collaboration with City Staff

As a recognized independent body, Uptown Planners may work with City staff throughout the City's planning process when requested by the City or at Uptown Planners' own initiative,

including during the formation of long-range community goals, objectives, and proposals or revisions for inclusion in a General or Community Plan.

### 2.2 Advisory Reviews by Uptown Planners

Uptown Planners may make advisory recommendations to the City and other governmental agencies on land use matters within the geographical boundaries of Uptown Planners or related matters associated with implementation of its community plan as shown in Exhibit B, including the preparation of, adoption of, implementation of, or amendment to, the General Plan or a land use plan when a plan relates to its boundaries because it could affect land use, infrastructure, public services, and so on in the Uptown Community.

Uptown Planners may, upon City request or at its own initiative, make recommendations, or participate in additional efforts, such as identifying Capital Improvements Program infrastructure needs, or in additional City matters, including those related to environmental health, public safety, historic resources, business development, social and cultural programs, and other activities affecting or affected by land use and development projects and policies.

Uptown Planners recognizes that City staff and development project applicants are not required by the City to present their project or application before Uptown Planners although the City encourages applicants to conduct robust engagement with all CPGs, the community, and project neighbors. Uptown Planners may, at its own initiative, contact project applicants to request engagement and offer advisory recommendations to the City whether or not project applicants cooperate with Uptown Planners.

### 2.3 Timely Submittal of CPG Recommendations to the City

In order to be considered as part of the City's development review process, CPG project review recommendations, if any, must be submitted to the City within seven calendar days of Uptown Planners taking action.

In addition, Uptown Planners shall submit its recommendation and any conditions to the project proposed by Uptown Planners, using Bulletin 620 Distribution Form, or reasonable facsimile.

Uptown Planners will follow a uniform mandatory process for recording CPG project review recommendations through the use of an annual report that includes all project recommendations and that report shall be part of Uptown Planners' official records.

### 2.4 Adherence to Ralph M. Brown Act

Uptown Planners must comply with California's Open Meeting Law, the Ralph M. Brown Act, set forth at California Government Code sections 54950 through 54963 (Brown Act), by conducting meetings that are open to the public, properly noticed, and in compliance with each of the Brown Act provisions. Failure of Uptown Planners to conduct meetings in compliance with the Brown Act provisions shall constitute sufficient reason for Uptown Planners to lose its Council recognition and may subject Uptown Planners and its voting members, as defined in its rules of procedure (reference Section 6.2, to a loss of indemnification by the City.

### 2.5 Maintenance of Open Records

Uptown Planners shall maintain and make publicly available its official records, as fully detailed in Section 7.2.

These records include Uptown Planners' rosters, annual reports, meeting agendas, applications to serve as voting members, evidence of completion of annual trainings, and meeting minutes for a minimum of five years (either on its website, in electronic files, or in hard copies) from the date each record is created. Uptown Planners will make all official records available to the City and to any member of the public upon request. Written applications submitted to Uptown Planners by individuals wishing to serve as voting members and records of election results also are considered official records and will be maintained by Uptown Planners in accordance with Policy 600-24.

Uptown Planners will submit to the City the required public roster (limited information) and private roster (available only to City staff) of Uptown Planners voting members by May 1<sup>st</sup> of each year and also will submit to the City any changes to rosters as a result of Uptown Planners elections or appointments. Uptown Planners will submit its annual reports to the City within 14 days of the approval of the March minutes. Annual reports should include a summary list of accomplishments, and major actions on large projects and policy matters covering a calendar year from April through the following March.

#### 2.6 Independent Entity

Uptown Planners is an independent entity from the City and must be able to operate as such. It will exercise sole discretion in deciding its agendas and recommendations and may pursue informational and advisory contacts with individuals and organizations that it deems appropriate, both those representing the City and others. The City may provide assistance to CPGs at the discretion of the City and subject to the availability of City resources. In addition, CPGs may be allocated funds by the City when such funding is approved by the City Council. Uptown Planners also may fundraise both within and outside the Uptown Community in order to support its general operations, including those required to conduct outreach, maintain records, and manage elections (reference Section 7.3.5). All financial contributions must be voluntary, with no mandatory membership dues or meeting attendance fees. Who does and not contribute to Uptown Planners will not influence its decisions or actions.

### **3. Community Participation and Representation**

#### 3.1 Membership

Uptown Planners will ensure that its voting members, to the greatest extent possible and as allowed by law, represent the entire community and community interests, including homeowners, renters, and diverse race, ethnicity, and age groups and members of businesses, non-profit organizations, and different neighborhoods within Uptown.

Uptown Planners and its voting members should routinely seek robust community participation in Uptown Planners planning and implementation process to serve the best long-term interest of the community at large. Uptown Planners shall submit a detailed written Community Participation and Representation Plan to the City Council along with its application for recognition (see Exhibit C).

### 3.2 Community Outreach

Uptown Planners and its voting members shall routinely seek community participation in Uptown Planners planning and implementation process to serve the best long-term interest of the community at large.

### 3.3 Collection of Membership Data

To measure community representation, Uptown Planners shall gather demographic and community affiliations data of all voting members at the time of elections or other regular periods to measure inclusion and diversity on Uptown Planners. This data should be submitted to the City along with the annual rosters required by Section 2.5. Participation in this type of survey will be voluntary and will be conducted in a manner to ensure the privacy of responses and respondents.

## **4. CPG Composition**

### 4.1 Number of Voting Members

Uptown Planners will have a maximum of 15 voting members, each elected to 4-year terms and representing the various community interests set forth in these Operating Procedures, including the different neighborhoods within Uptown that Uptown Planners represents. Annual elections will recruit candidates for all open seats up to the maximum allowed, observing limits specified in Section 4.4.

Vacancies may occur due to having no qualified candidates elected or unfilled seats after an election; resignation; other reasons specified in Section 8.3; or ineligibility (per Section 4.2). When one or more vacancies occur, Uptown Planners may, to ensure representation of unique community interests, create temporary appointed seats for voting members. Appointees would be required to meet eligibility requirements detailed in Section 4.2. Appointments to temporary seats would require a majority vote at a regular meeting of the board. Voting members who held temporary appointed seats would be authorized to serve only until the next election, when they could be eligible to run as a candidate for a regular voting seat with a new term. Former board members who had exceeded the maximum time of service but not completed the required one-year break in service would not be eligible for appointment, and time of service as an appointed voting member would be included in determining allowable maximum time of service (reference Section 4.4.1). Appointments to temporary seats will be required only if the number of voting members otherwise would fall below 10. Appointed voting members will be chosen to broaden, rather than narrow, the diversity of representation on Uptown Planners. Any appointees would need to meet all of the qualifications of a candidate for election.

### 4.2 Voting Member Eligibility

Voting members must meet the minimum qualifications identified in this section throughout their entire term of service or be subject to removal, as described in Section 8.3.1.

#### 4.2.1 Minimum Age & Maintenance of Community Affiliation

Members will be a minimum of 18 years of age, except for the appointed non-voting youth

representative described in Section 4.3.1. Voting members also will meet the affiliation requirements in Section 4.3 throughout their term of service.

#### 4.2.2 Minimum Attendance Requirements

Uptown Planners shall take attendance to record whether each voting member attends at least two-thirds of Uptown Planners' regularly scheduled board meetings (including special board meetings but not committee meetings) in any 12-month period throughout their term as a voting member. Board members shall be recorded as attending if they are present and available to vote for at least one-half of the meeting time stated on the agenda. Failure to meet minimum attendance requirements shall be grounds for disqualification of the voting member. Absences due to health reasons may be excused at the discretion of the Chair. There are no requirements for voting member attendance prior to the election or appointment of a voting member.

#### 4.3 Community Representation

Uptown Planners will ensure that voting members be affiliated with the community as either

- (1) A non-resident property owner, who is an individual identified as the sole or partial owner of record, or their employee, of a real property (either developed or undeveloped), within the Uptown Planners area. The documentation required to verify property owner status is detailed in Section 5.1.4. Only one representative of a property may run as a candidate or serve at any time. An employee must provide a letter from the documented owner certifying their status.
- (2) A resident, who is an individual whose primary address of residence is an address in the Uptown Planners area. The documentation required to verify resident status is detailed in Section 5.1.1.
- (3) A local business person, who is a local business or non-profit owner, operator, or designee at a non-residential real property address in the Uptown Planners area. The documentation required to verify status as owner of a qualifying business or non-profit establishment is detailed in Sections 5.1.2 and 5.1.3. Only one representative of an establishment may run as a candidate or serve at any time. An operator or designee must provide a letter from the documented owner certifying their status.

##### 4.3.1 Appointed Seats

To ensure representation of youth stakeholder interests in the community planning area, Uptown Planners will open a single non-voting seat that can be filled by a youth appointed by Uptown Planners. The appointed non-voting youth representative must be a minimum of 15 years of age and a maximum of 18 years of age at time of appointment and meet the requirement for a resident described in Section 4.3 (2). Prior to beginning their term, youth members that are under the age of 18 shall provide written permission from their legal guardian to serve on Uptown Planners.

A youth representative appointment may be made at any regular meeting of Uptown Planners and will last for a period of maximum one year, ending each year after the election for voting members. Whenever there is a vacancy for the youth representative position, qualified candidates may apply to the Chair to fill the position. Uptown Planners will decide whether to appoint or not appoint applicants at a regular board meeting. A non-voting youth representative who re-applies may be appointed to serve consecutive terms, as long as the youth representative remains qualified for the position at the beginning of each new term. A non-voting youth



representative will not be subject to attendance requirements.

Additional appointed seats for voting members will be temporary appointments intended to ensure sufficient representation of diverse community interests by filling vacancies, as specified in Section 4.1.

#### 4.4 Voting Member Term Limits

Uptown Planners' term limits for its voting members ensure that the membership is not dominated over time by individual voting members or groups within the community. These term limits conform with the following requirements:

##### 4.4.1 Maximum Time of Service

CPG voting members will not serve their service time for more than eight consecutive years, including time served as a voting member in a temporary appointed seat. CPG voting members who accumulate this maximum service time can be eligible to serve again after a one-year break in service.

##### 4.4.2 Waivers of Maximum Time of Service

If, after a good faith effort to do so, the ad hoc Election Committee

of Uptown Planners reports that it cannot recruit a sufficient number of candidates for its annual election to ensure that at least 10 seats would be filled, Uptown Planners may waive the maximum time of service by majority vote of its voting members present at a regular board meeting. Such a waiver would allow current or former board members who have exceeded the maximum time of service but not yet completed a one-year break in service nevertheless to run as candidates in the annual election. Should Uptown Planners choose to exercise this waiver, it will follow these requirements:

- (1) Waivers of Maximum Time of Service shall not be granted unless necessary to ensure there are at least 10 voting members, per Section 4.1.
- (2) Waiver of Maximum Time of Service to ensure there are at least 10 voting members shall be ratified by at least a two-thirds majority of the votes cast by eligible community members participating in the annual election; and
- (3) the term of a voting member elected by a two-thirds vote serving beyond the Maximum Time of Service should count as time served beyond the required break in service as required by this section.

## **5. Open and Public Elections**

### 5.1. Equal Participation

Uptown Planners election procedures encourage equal participation by all members of the public of a community, including term limits that voting members of a recognized CPG can serve, as detailed in Section 4.4.

All members of the public affiliated with the community within the geographical boundary of Uptown Planners will be allowed to vote in Uptown Planners elections, so long as they meet

minimum conditions for eligibility for members of the board per Section 4.2 of these Terms and Conditions, including complying with the following requirements, documented as specified in Section 4.2:

- Only one elected CPG voting member per business tax certificate or non-profit establishment
- Only one elected CPG voting member per property tax billing when voting as a non-resident property owner as specified in Section 4.3.

No additional qualifications, such as meeting attendance requirements, will disqualify someone from voting, and no voting requirement will be stricter than allowed by the California Elections Code or Section 5.1.1. No proxy voting is allowed.

#### 5.1.1 Voter Identification for Resident Community Members

Consistent with state and federal law, proof of residency or identity, should consist of presenting an original or copy of any of the documents described below in either paragraph (1) or (2) or both, if and as required to verify linkage of photo to a matching name and matching address. These requirements should be construed liberally in favor of allowing a community member to vote in the election, and any doubt resolved by a member of the ad hoc Election Committee.

(1) Current and valid photo identification provided by a third party in the ordinary course of business that includes the name and photograph of the individual presenting it. Examples of photo identification include, but are not limited to, the following documents: (A) driver's license or identification card of any state; (B) passport; (C) employee identification card; (D) identification card provided by a commercial establishment; (E) credit or debit card; (F) military identification card; (G) student identification card; (H) health club identification card; (I) insurance plan identification card; or (J) public housing identification card.

(2) Any of the following documents, provided that the document includes the name and address of the individual presenting it, and is dated since the date of the last election, unless the document is intended to be of a permanent nature such as a pardon or discharge, including: (A) utility bill; (B) bank statement; (C) government check; (D) government paycheck; (E) document issued by a governmental agency; (F) sample ballot or other official elections document issued by a governmental, agency dated for the election in which the individual is providing it as proof, of residency or identity; (G) voter notification card issued by a governmental agency; (H) public housing identification card issued by a governmental agency; (I) lease or rental statement or agreement issued by a governmental agency; (J) student identification card issued by a governmental agency; (K) tuition statement or bill issued by a governmental agency; (L) insurance plan card or drug discount card issued by a governmental agency; (M) discharge certificates, pardons, or other official documents issued to the individual by a governmental agency in connection with the resolution of a criminal case, indictment, sentence, or other matter; (N) public transportation authority senior citizen and disabled discount cards issued by a governmental agency; (O) identification documents issued by governmental disability agencies; (P) identification documents issued by government homeless shelters and other government temporary or transitional facilities; (Q) drug prescription issued by a government doctor or other governmental health care provider; (R) property tax statement issued by a governmental agency; (S) vehicle registration issued by a governmental agency; or (T) vehicle certificate of ownership

issued by a governmental agency.

#### 5.1.2 Voter Identification for Community Business Owners

Business Owners within the community should present an original or copy of a Business Tax Certificate or equivalent document showing a business address within Uptown Planners boundaries. Each business is limited to a single vote. These requirements should be construed liberally in favor of allowing a community member to vote in the election, and any doubt resolved by a member of the ad hoc Election Committee.

#### 5.1.3 Voter Identification for Community Non-Profits

Employees of non-profits within the community should present an original or copy of their founding documents or a related document showing an associated address within Uptown Planners boundaries. Each non-profit is limited to a single vote. These requirements should be construed liberally in favor of allowing a community member to vote in the election, and any doubt resolved by a member of the ad hoc Election Committee.

#### 5.1.4 Voter Identification for Community Non-Resident Property Owners

Non-residents who own property within the community should present documents similar to those described in 5.1.1 above, however, at least one of these documents should show the address of the property in the community owned by the non-resident and be sufficient to prove ownership, such as a title deed. These requirements should be construed liberally by CPGs and any doubt resolved in favor of allowing a community member to vote in the election, and any doubt resolved by a member of the ad hoc Election Committee.

### 5.2 Transparency and Inclusion in Operations

Uptown Planners provides for a fair and transparent process, intended to ensure broad outreach to the community, sufficient time for community members to participate in elections, and the principles of inclusion and diversity in CPG operations.

#### 5.2.1 Candidate recruitment

Uptown Planners will form an ad hoc Election Committee for each annual March election no later than November of the preceding year. This committee will be responsible for organizing the efforts of board members and community volunteers to recruit a diverse group of candidates for open positions on the board. Methods will include postings on the Uptown Planners website, its distribution list, and its social media sites; attempts to obtain coverage in local news media that serve the Uptown community; and posting of notices in Uptown neighborhoods. If and as its finances and volunteer staffing allow, Uptown Planners also may advertise in local media and distribute notices to residential and business addresses in Uptown.

#### 5.2.2 Candidate applications and communications

No later than the regular board meeting in December of the year preceding each annual election, the ad hoc Election Committee will create and make available through the Uptown Planners website an application form that prospective candidates must complete and sign. This application will require candidates to document eligibility to serve on the board (as detailed in Section 4, including maximum time of service requirements) and to provide a candidate statement (requirements for which will be determined by the ad hoc Election Committee) and

a headshot photo for use in informing the community about the election.

The deadline for candidate applications shall be at the stated beginning time for the regular February board meeting of Uptown Planners. Within seven days after that meeting, the Chair of the ad hoc Election Committee will verify eligibility of applicants; contact any applicants whose applications are deemed incomplete or ineligible, explaining why; and if there are candidate denials, allow two business days for appeals of eligibility (to be decided by the Chair of Uptown Planners, who may consult with City officials). Then, within one week of the regular February board meeting, the Chair of the ad hoc Election Committee will confirm the names that will appear on the election ballot.

### 5.2.3 Promotion of the election

As soon as practical after confirming the names that will appear on the election ballot and no less than 10 days before the election, Uptown Planners will post the confirmed list of candidates, along with their statements and photos, on its website. The posting also will announce the option of challenging election results by referencing Section 5.2.7. The ad hoc Election Committee will use the methods used for recruiting candidates detailed in Section 5.2.1 to publicize the election and encourage voting by qualified members of the Uptown community. In order avoid possible issues with conflicting candidate schedules or no-shows, Uptown Planners will neither conduct nor sponsor an official candidate forum. However, the ad hoc Election Committee may contact other community organizations to encourage them to invite candidates to present at meetings of their groups.

### 5.2.4 Election procedures

The ad hoc Election Committee will create a ballot listing all confirmed candidates in alphabetical order by last name with a single box or space for votes beside each name. The ballot should clearly indicate the number of votes allowed, which should be equal to the number of open seats (or the number of candidates, if there are fewer candidates than open seats). The ballot will not include candidate statements or photos, although those may be posted or otherwise made available at the polling place. The ballot will not allow for write-in votes. At the regular February board meeting preceding the annual election, the ad hoc Election Committee will recommend to the board election details, including poll locations within the community; dates and times for voting, possibly using mail or online voting options; and detailed procedures for the conduct of the election. The ad hoc Election Committee will base its recommendations upon availability of resources, the need both to verify eligibility and to protect the confidentiality of secret written ballots, and the goal of accessibility for diverse members of the Uptown community. The ad hoc Election Committee's recommendations will be subject to approval or change by a vote of the board.

### 5.2.5. Polling

Voting for the March election may begin as early as one week before the regular March meeting of Uptown Planners and end two hours after the start time of that meeting, or longer only as necessary to accommodate voters already in line to vote at that closing time. Members of the ad hoc Election Committee and other members of Uptown Planners will staff and monitor the polls, discouraging electioneering. The California Elections Code definition of electioneering prohibits the visible display or audible dissemination of information that advocates for or against any

candidate within 100 feet of either the entrance of a building that contains a polling place or any outside site at which a voter may cast or drop off a ballot. Prohibited electioneering information or activity includes, but is not limited to, any of the following: a display of a candidate's name, likeness, or logo; a display of a ballot measure's number, title, subject, or logo; buttons, hats, pencils, pens, shirts, signs, or stickers containing electioneering information; dissemination of audible electioneering information; and obstructing access to, loitering near, or disseminating visible or audible electioneering information at ballot drop boxes.

#### 5.2.6 Verification of election results

Members of the ad hoc Election Committee and, if needed, other members of Uptown Planners will count all votes cast in the election at the time of the regular March meeting of Uptown Planners, allowing any interested members of the public to observe. The meeting of Uptown Planners will recess if that is necessary to have a quorum to conduct business. Results will be based upon criteria determined by the ad hoc Election Committee and approved by the board, except in the case of any candidates waived in despite exceeding maximum time of service, as detailed in Section 4.4.2. Tie votes will be settled by a coin toss. When the vote count is completed, the Chair of the ad hoc Election Committee will announce the results at the concurrent Uptown Planners meeting, specifying the number of votes cast and counted for each candidate. After announcing the results, the Chair of the ad hoc Election Committee will securely preserve ballots cast for a minimum of one week, to allow time for the Chair of Uptown Planners to investigate any challenges.

#### 5.2.7 Election challenges

Any challenges to an election must be made to the Chair of Uptown Planners within 24 hours after announcement of the results at the regular March Uptown Planners meeting. The Chair, who may consult with City officials in making a determination, will recommend a response to the board at the regular April meeting of Uptown Planners and preserve any relevant evidence until that time.

#### 5.2.8 Seating of members

At the regular April board meeting of Uptown Planners, the first item of business after adopting the agenda will be to seat newly elected members, unless there has been an election challenge. In the case of an election challenge, a preceding item of business will be the Chair's recommended response, which the board will decide based upon a majority vote of continuing board members present. If an open seat remains unfilled because of an election challenge, an insufficient number of candidates, or for any other reason, additional members may be temporarily appointed, per Section 4.1. After seating new members and new appointees, Uptown Planners will provide the City with updated member and officer rosters as detailed in Section 2.5.

#### 5.3 Election Timing

Uptown Planners will host its elections during the month of March each year. If unavoidable external circumstances (such as a health or weather emergency) prevent an annual election being held in March, it will be held as soon as practical after that date. All election-related deadlines specified elsewhere in these Operating Procedures (such as for candidate applications and seating of newly elected members) will adjust accordingly and term lengths will adjust so

that the end-date of continuing terms will continue to be March.

## **6. Conduct of Meetings**

### 6.1 Professional Conduct

Uptown Planners and its voting members will conduct themselves reasonably and professionally and refrain from disrupting the public process as set forth on any Uptown Planners' agenda. Any violations of courtesy and decorum by voting members will be addressed per the adopted rules of procedure specified in Section 6.2. The Chair will rule upon any disruptions by members of the public, identified either by the Chair or in response either to a member's point of order or an objection from a member of the public. The Chair's ruling would be subject to appeal and overrule. Except in the case of extreme circumstances, such as imminent danger or damage, no one should be required to leave a meeting without first receiving a warning that identifies the conduct of concern and the possible consequence of removal. If necessary to effect a removal, to restore order, or to avoid potential danger or damage, a Chair may recess a meeting until order is restored or may adjourn the meeting early.

### 6.2 Rules of Procedure

Uptown Planners shall adopt [the most current revision of Rosenberg's Rules of Order](#) as rules of procedure, which provides a uniform means for Uptown Planners to facilitate its public meetings (including all of the types of meetings specified in Section 6.X), conduct public business, and resolve disputes. As a standing rule of the body required to apply its adopted rules of procedure, Uptown Planners will count the votes on any motion or appeal based upon the votes of voting members who are present and voting. This includes the vote of the Chair, who will vote the same as any other member. The adopted rules of procedure will not be followed if they conflict with other requirements of these Operating Procedures, City Policy 600-24, the Brown Act or any other superseding governmental regulation. When procedural issues arise during meetings that are not clearly and completely covered by the adopted rules of procedure or any other regulation, the Chair of the board or committee meeting will rule, subject to overrule based upon a motion to appeal the Chair's ruling.

### 6.3 Transparency in Operations

Uptown Planners will maintain transparency in its operating procedures, as outlined herein and in Policy 600-24, including requirements of the Brown Act. This will ensure open meetings with appropriate public notice that invite community participation in Uptown Planners meetings. Locations should provide for disability accommodations, and agendas should provide information about accommodation services such as language interpretation or signage. No member of the public will be required to identify themselves in order to participate in meetings, and anyone attending an Uptown Planners meeting, including members of the news media, may record it. Members will vote aloud on motions, with no secret ballots.

### 6.4 Officers

Uptown Planners will elect four officers from among its board members annually at its April meeting, after new members are seated: Chair, Vice-Chair, Secretary, and Treasurer.

#### 6.4.1. Responsibilities of Officers

Elected officers will be responsible for the duties of their offices, including those listed below, obtaining voluntary assistance of other board members if and as required.

- Chair: As the principal officer of Uptown Planners, lead board meetings and maintain order per adopted rule of procedure; oversee communications (including inquiries and information sharing); establish agendas; sign official forms and correspondence authorized by the board; appoint committee Chairs, members, and community representatives, subject to approval by the board; and be the central contact for board business; serve as Uptown Planners' representative at meetings of the Community Planners Committee, unless the Chair requests that the board elect a different representative from among members of the board.
- Vice-Chair: Assist the Chair upon request and, when the Chair is unavailable or unable, temporarily perform the duties of the Chair. Serve as Uptown Planners' alternate at meetings of the Community Planners Committee, unless the Vice-Chair requests that the board elect a different alternate from among members of the board.
- Secretary: Develop board meeting minutes, assist the Chair in developing correspondence and operational records (such as rosters and reports), and distribute and maintain records as required, including as specified in Sections 2.5 and 7.2.
- Treasurer: Manage required banking and related financial accounts, handle receipts and disbursements, maintain an inventory of physical assets, regularly report to the board, and prepare an annual summary of transactions, assets, and liabilities (per Section 7.2).

#### 6.5 Committees

Standing committees will consist of the Design Review Committee, the Historic Resources Committee, the Public Facilities Committee, and the Operations and Outreach Committee. Ad hoc committees include the ad hoc Election Committee (see Section 5) and any other temporary committees created by the board of Uptown Planners to serve a special purpose. While committees cannot take independent actions absent approval of the Uptown Planners board, they may vote to recommend actions for approval of the board on its consent agenda (per Section 6.8).

##### 6.5.1 Committee Procedures

The Chair of Uptown Planners nominates Chairs of all committees annually, subject to approval of the board. With regard to proceedings of their committees, Chairs will have responsibilities and follow rules of procedure that apply to the Chair of the board of Uptown Planners (per Sections 6.2 and 6.4.1) and follow requirements for public noticing (per Section 6.7). Committee Chairs will schedule meetings at their own discretion or whenever the Uptown Planners board votes that the committee should address an agenda item or matter of community concern in order to make a recommendation to the board. Every voting member of Uptown Planners is encouraged to volunteer to serve as a voting member on at least two committees, and all committees must have at least two voting members. In the absence of sufficient volunteers, the Chair of Uptown Planners will appoint board members to serve as voting members on committees. Committee Chairs will accept all volunteer board members as voting members of their committees, unless doing so would result in the membership of the committee exceeding the quorum of the full board, in which case the Committee Chair would limit membership.

Chairs of standing committees may appoint individuals who are not voting members of the board to serve as non-voting members of their committees, subject to approval of the board and completion of training required by the City. Committees may meet in joint session if the number of voting members in attendance does not meet a quorum of the full board and if voting on recommendations to the board is done separately by each committee.

#### 6.6 Types of Board Meetings

Uptown Planners will hold regular public meetings of its board monthly, except in July and January. Meetings will be on the first Tuesday of each month or as soon as possible thereafter, based upon availability of an appropriate meeting location (per Section 1). Uptown Planners meetings will be held in-person within its boundaries or they may be held in hybrid or other formats, in accordance with Council Policy 600-24 and the Ralph M. Brown Act.

Uptown Planners will hold special meetings of its board when either the Chair or a vote of the board identifies a special purpose or topic of community concern that requires quick action or does not fit time-wise onto a regular meeting agenda. Uptown Planners may not schedule emergency meetings.

#### 6.7 Public Notice of Meetings

Uptown Planners will provide a minimum of 72-hour notice of agendas for all regular board meetings and standing committee meetings. Uptown Planners will provide minimum 24-hour notice for agendas of all special board meetings and ad hoc committee meetings. In compliance with the Brown Act, agendas will be posted both on the Uptown Planners website and in written form visible 24/7 at the physical location of the meeting, except in the case of ad hoc meetings. If a meeting is cancelled in advance or is adjourned or ended before completing the agenda (reference Section 6.8), public notice will be posted as soon as possible and no more than 24 hours after the meeting date. The notice will identify the next meeting date and, if that is within five days, the same agenda may be used.

#### 6.8 Meeting Agendas

Agendas for regular Uptown Planners board meetings will include, at minimum the following elements:

- Meeting date, start & adjournment time, location, and contact information for questions about the meeting.
- Parliamentary items, including procedural announcements; roll call and confirmation of quorum; agenda approval or modifications; approval or modification of previous meeting minutes; treasurer's report; reports from related advisory committees; Community Planners Committee report; and chair's report.
- Non-agenda public comment on issues within the scope of Uptown Planners but not on the agenda. Both members of the public and board members may speak. Board members may ask speakers brief factual or clarifying questions but should not engage in dialog.
- Representative comments, by or on behalf of elected officials, agencies, and institutions.
- Information items: announcements, reports, or brief presentations on topics of interest to the community. The board may not take action on items categorized as information



items, except after request for and board approval of that change.

- Consent items: Projects or other approvals assumed to be non-controversial and also any recommendations of committees, which will automatically be identified as consent items. Consent items may be voted upon immediately, though a brief summary presentation of each item and limited discussion may be allowed.
- Action items: Documents, reports, or presentations for discussion and possible action.
- Administrative items, including reports from committee chairs and announcing or setting committee meeting dates and agenda items, but not including substantive actions.
- Request for future agenda items, which will automatically include any items continued from the current agenda.
- Confirmation of date of next regular board meeting.
- Adjournment.

In the case of special board meetings, the agenda will address only a single topic, which may be a recommendation of a committee. The agenda should not include any parliamentary or administrative items and need not include either non-agenda public comment or representative comments.

In the case of committee meetings, the agenda will include all agenda items required for board meetings that are relevant to the work of the committee, including time for non-agenda public comment on issues within the scope of the committee.

At any time during both board and committee meetings, modifications may be requested to the order or categorization of agenda items. Modification requests, including continuing an item to a future meeting, must be made by voting members and are subject to a vote of approval, except in the case of re-categorizing a consent item to an action item, which will be automatic upon request by either a member of the public or a member of the board. Additions only should be made in limited circumstances when there was not an ability to properly notice an item that requires attention before the next regular board meeting. Such additions require approval of two-thirds of the entire voting membership; if fewer than two-thirds of voting members are present, then the agreement of all voting members present is required for approval.

Written descriptions of agenda items, though typically 20 words or less, should summarize a specific topic, proposal, project, and/or potential outcome clearly and provide essential identifying details. While supporting materials may be included with the agenda on the Uptown Planners website, those also may be made available only at the meeting, either as digital files available on the Uptown Planners website, physical copies of documents, slide shows, or other forms of presentation.

Agendas may include estimated approximate times for addressing items on the agenda but not times certain. Agendas also may indicate anticipated procedural requirements, such as time limits per speaker or orderly division of discussion among presenters, members of the public, and members of the board. However, the Chair, subject to override by the board or committee, may modify procedural requirements during the meeting as appropriate and in an equitable manner, based upon the time available, the number of items on the agenda, and the number of potential speakers.

### 6.9 Meeting Deliberations and Decision-making

At both board and committee meetings of Uptown Planners, a quorum will consist of more than half of voting members. Absent a quorum, no business can be conducted. If a quorum is not present after 15 minutes of the stated meeting start time or later, the Chair may adjourn the meeting.

At both board and committee meetings of Uptown Planners, all voting members in attendance at Uptown Planners board and committee meetings are required to vote to approve or disapprove all motions, unless they either recuse or abstain (reference Section 7.31., 7.3.2, and 7.3.3). A majority of votes will consist of more than half of all voting members present and voting. All motions will pass by majority vote unless a larger proportion either of voting members in attendance or of all voting members is stipulated in these bylaws or in adopted rules of procedure. (Reference Section 6.2).

In the case of committee meetings, voting members will be only those members approved as appointed to the committee (reference Section 6.5.1). Although other board members may not vote on committee motions, they may participate, unless the number of voting board members attending a committee meeting meets or exceeds a quorum of the entire board.

### 6.10 Minutes and Approved Actions

Minutes for Uptown Planners board meetings will include, at minimum the following elements:

- Times of start and adjournment.
- Attendance of members, indicating time of absences from any part of the meeting.
- Substantive rulings by the Chair.
- Brief summaries of any new information reported.
- Decisions, including regarding agenda changes or requests; procedural decisions by the Chair; consent items; or action items, including the text of the motion, who moved and seconded, and the votes of all voting members.
- Stated reasons for recusals and abstentions.
- Attachments or links for all materials or presentations shared at the meeting and not already included with the agenda as supporting materials, except those provided at times of non-agenda public comment or representative comments.

Draft minutes of regular and special board meetings will be posted on the Uptown Planners website no later than 24 hours before the following regular board meeting, unless special circumstances warrant delay. If the board withholds approval of minutes because it decides that they request extensive revision, approval of final minutes may be delayed until the next regular board meeting. After draft minutes are revised as requested by the board, they will be marked final with the approval date shown. Final minutes will be posted on the Uptown Planners website within two weeks of approval.

Minutes of committee meetings are not required. Actions of committees will be documented by means of oral or written reports provided by the Chairs of committees at regular board meetings of Uptown Planners and documented in board meeting minutes.

## **7. Additional CPG Responsibilities & Ethical Standards**

### 7.1 Commitment to Non-Discriminatory Practices

Uptown Planners, in conducting its responsibilities, will not discriminate against any person or persons by reason of race, color, sex, gender, age, creed, national origin, ancestry, sexual orientation, marital status, military or veteran status, genetic information, medical condition, or physical or mental disability.

### 7.2 Records Retention

Uptown Planners will maintain its official records for a minimum of five years (either on its website, in electronic files, or in hard copies) from the date each record is created. Upon request, Uptown Planners will make all official records available to the City or any member of the public with 10 days of request. The official records of Uptown Planners include

- Rosters of voting members, updated and provided to the City (per Section 2.5)
- Community Planners Committee Membership Data Form (per Section 6.4.1)
- Evidence of voting members' completion of required annual training (per Section 7.4)
- Applications of candidates wishing to serve as voting members (per Section 5.2.2)
- Election results and records of appointments (per Section 4.1, 4.3.1, and 5.2.6)
- Agendas of board and committee meetings, including any supporting materials distributed before meetings (per Section 6.8)
- Approved minutes of board meetings, including any documents distributed at the meeting (per Section 6.10)
- Recordings of board meetings if made by a board member and provided to the Secretary.
- Official forms or correspondence authorized by the board
- Treasurer's annual summary of transactions, assets, and liabilities (per Section, 6.4.1)
- Annual CPG Report required by the City (to be submitted via email to [sdplanninggroups@sandiego.gov](mailto:sdplanninggroups@sandiego.gov) within 14 days of approval of March minutes)

### 7.3 Ethical Standards

All voting members of Uptown Planners must uphold the standards in this Section throughout their terms of service as members of the Uptown Planners board.

#### 7.3.1 Conflicts of Interest

An Uptown Planners voting member with a potential conflict of interest should recuse from participation (including discussion) in a recommendation if they have a direct economic interest. A direct economic interest includes, but is not limited to, investments in or positions with a business entity, interest in real property, source of income, source of gifts, and personal finances. Members who recuse from vote will not count towards the quorum required for that vote. If a conflict that would be grounds for removal is suspected but not acknowledged by the member, the board should determine the need for recusal. If fewer than two-thirds of voting members are present, then all voting members present must approve.

#### 7.3.2 Exceptions to Conflicts of Interest

Exceptions to conflicts of interest may be granted by Uptown Planners voting members who can show that the decision will not have an effect on their economic interest.

### 7.3.3 Abstentions for Potential Conflicts of Interest

An Uptown Planners voting member may voluntarily choose to abstain from voting when that member has legitimate, non-economic, personal interests in the outcome that would, at minimum, give the appearance of impropriety, cast doubt on that member's ability to make a fair decision, or a where that voting member lacks sufficient information upon which to cast a vote. If a community planning group member realizes they need to abstain in the middle of a discussion item, they should immediately announce that fact and not participate in the item any further. Uptown Planners' record of the vote on the item will reflect an abstaining voting member in the vote and they are still counted in the quorum for that item, regardless of the point in time they declare their abstention.

### 7.3.4 Political Actions

Neither Uptown Planners nor voting members in their capacity as such may use their title from or position on Uptown Planners for political endorsements of individuals. Uptown Planners may, however, upon majority vote, take a position on pending legislation that is within Uptown Planners' purview (reference Section 2.2).

### 7.3.5 Donations

Neither Uptown Planners nor its voting members should accept donations on behalf of any individual running for office. All financial contributions to Uptown Planners must be voluntary, with no mandatory membership dues or meeting attendance fees. There will be no solicitation in support of specific causes or actions. Who does and not contribute to Uptown Planners will not influence its decisions or actions.

### 7.3.6 Equal Time for Candidates or Ballot Measures

Uptown Planners will endeavor to grant equal time for candidates or ballot measures if docketed on Uptown Planners agenda. Equal time does not apply to individuals speaking during non-agenda public comment.

## 7.4 Voting Member Training

Uptown Planners will require all Uptown Planners voting members to complete the formal education program in-person or on-line offered by the City.

Uptown Planners will require voting members to complete the training each year within 60 days of being initially elected or appointed to Uptown Planners, and by no later than June 1<sup>st</sup> of each succeeding year for as long as the voting member is serving or re-elected.

Evidence of completion of annual training shall be part of Uptown Planners' official records. Failure of voting members to complete the specified training each year will make the member ineligible to serve.

In addition, Uptown Planners expects that all voting members will familiarize themselves with,

abide by, and enforce the contents of these Operating Procedures and of the adopted rules of procedure (reference Section 6.2).

#### 7.5 Collaboration with City Staff

Voting members of Uptown Planners will collaborate with the City on an ongoing basis and as requested by the City to increase its voting members' understanding of the role and responsibilities of Uptown Planners.

### **8. Rights and Liabilities of Uptown Planners**

#### 8.1 Indemnification

Pursuant to the policy of the City Council, the City will indemnify, and the City Attorney will defend, Uptown Planners or its individual voting members, acting in their capacity to the City, under the specified terms set forth in San Diego Ordinance No. O-19883 NS, adopted July 28, 2009, titled "An Ordinance Providing for Defense and Indemnification of Community Planning Groups," (Ordinance), which may be amended from time to time. Defense and indemnification cover any claim or action of civil wrongdoing against Uptown Planners or its duly elected or appointed voting members resulting from their obligations to advise and assist the City and its agencies with land use matters as specified herein, so long as their conduct was in conformance with these Operating Procedures, all of the findings specified in the Ordinance can be made, and the rights to defense and indemnification are consistent with state law. The right to defense and indemnification do not apply to allegations of criminal wrongdoing, including alleged criminal violation of the Brown Act.

When Uptown Planners or one of its individual voting members is found to be out of compliance with the provisions of Policy 600-24, or with these Operating Procedures, they acknowledge they risk loss of defense and indemnification pursuant to the Ordinance, and any future amendments.

#### 8.2 Violations and Remedies Related to Provisions Citing the Brown Act

Pursuant to provisions required by the Brown Act, including civil remedies (California Government Code sections 54960 through 54960.5) and criminal penalties (Government Code section 54959) for violation of the provisions, Uptown Planners will ensure good faith, voluntary compliance with the Brown Act and proactively cure violations themselves, to prevent legal actions that would void actions of Uptown Planners. Individual voting members of the Uptown Planners, as well as the group as a whole, could be subject to civil remedies. Civil remedies may include relief to prevent or stop future or ongoing violations of the Brown Act, or to void past actions of Uptown Planners, and may in some cases include payment of court costs and attorney's fees.

Individual voting members of Uptown Planners may also potentially face criminal misdemeanor charges for attending a meeting where action is taken in violation of the Brown Act, if the voting member intended to deprive the public of information to which the member knew or had reason to know the public was entitled. Action taken includes collective decisions or promises, and also includes tentative decisions. Uptown Planners, or any of its individual voting members, may seek assistance, as well as training, from the City to better understand, implement, and

comply with the Brown Act.

Any member of the public may refer alleged violations of the Brown Act by Uptown Planners to appropriate law enforcement agencies, including the California Attorney General, San Diego County District Attorney, or San Diego City Attorney's Criminal Division. Uptown Planners, or any of its individual voting members, accused of criminal violations of the Brown Act does not have the right to legal protection or representation under these Operating Procedures or San Diego Ordinance O-19883.

### 8.3 Violations of Membership Eligibility

Any CPG voting member who violates membership eligibility as defined in Section 4.2, may be removed by the remaining CPG voting members as outlined in Section 5.2

#### 8.3.1 Removal of Ineligible Voting Members

Voting members may be removed because of ineligibility as detailed in Section 4.2, death, incarceration, certified mental incompetence, breach of ethics as detailed in Section 8.5, conflicts of interest as detailed in Sections 7.3 and 8.6, repeated and extreme exceptions from professional conduct as identified in Section 6.1, or other grave and documented conditions in violation of these Operating Procedures or affecting a member's ability to fulfill their duties properly on the board. Claims of ineligibility from any source should be addressed to the Chair of Uptown Planners, who will assemble supporting documentation and then include possible removal as an action item on the publicly noticed agenda for the next regular board meeting of Uptown Planners. This will provide notice to the member whose eligibility will be considered.

The final decision regarding removal will be by majority vote of voting board members present at the board meeting, including the member being considered for removal, if present. The decision must be based on factual findings and the requirements of these Operating Procedures. Members also could remove themselves, by submitting a written resignation, which would be effective immediately unless the resignation specified a later effective date.

### 8.4 Violations and Remedies

If Uptown Planners violates these Terms and Conditions, it may forfeit its status as a recognized CPG and lose its right to indemnification and defense by the City. An Uptown Planners voting member and Uptown Planners itself risks loss of defense and indemnification pursuant to current San Diego ordinances and any future amendments.

In the case of an alleged violation of these Terms and Conditions by an Uptown Planners voting member, Uptown Planners will conduct an investigation consistent with Policy 600-24.

In the case of an alleged violation of Policy 600-24, the violation will be forwarded in writing to the City for review by the Mayor or their Designee. Uptown Planners will respond to the City in a dialogue to determine the validity of the complaint and to seek resolution of the issue or dispute.

Uptown Planners acknowledges that if the Mayor or their Designee is unable to resolve a dispute or determines that there has been a violation, the Mayor or their Designee may seek to resolve the dispute or violation informally, with the cooperation of Uptown Planners, or may recommend to the City Council that Uptown Planners' recognition be revoked.

Uptown Planners acknowledges that if the City Council determines through a recommendation from the Mayor or their Designee that Uptown Planners has violated their Operating Procedures or Policy 600-24 and Uptown Planners has failed to take corrective action deemed adequate in the sole discretion of the City Council, the City Council may revoke Uptown Planners' recognition under this Policy. The City Council may also prescribe conditions under which official recognition may be reinstated.

#### 8.5 Disciplinary Actions of Individual Voting Members in Violation of Operating Procedures

Uptown Planners acknowledges that any of its voting members found to be in violation of these Operating Procedures shall only be disciplined or removed by Uptown Planners at a scheduled meeting of Uptown Planners. This discipline or removal will be advertised on the agenda as an action item and the investigation or complaint will be reported to the City within 60 days of the allegation so as to ensure a fair and public process. (Reference Section 8.3.1)

#### 8.6 Potential Conflicts of Interest

Voting members of Uptown Planners found to have a conflict of interest who did not recuse from a vote may be subject to disciplinary action by the officers of Uptown Planners, which may include expulsion from the board. Uptown Planners will report in writing instances of disciplinary action to the City within 60 days of any allegation. (Reference Sections 6.9 and 7.3.1)

#### 8.7 Violations and Remedies for Quorum and Attendance Requirements

If Uptown Planners is unable to meet quorum and attendance requirements (reference Sections 4.2.2 and 6.9) for three consecutive months, then City may place Uptown Planners in a temporary inactive status, to allow Uptown Planners to work through its membership issues to return to active status. If Uptown Planners remains unable to meet quorum and attendance requirements for six consecutive months, then the Mayor or their Designee may recommend to the City Council that Uptown Planners' recognition be revoked.

#### 8.8 Violations of City Requests for Input

Uptown Planners acknowledges that a consistent failure to respond to the City's request for input on the preparation of, adoption of, implementation of, or amendment to the General Plan or a community, precise, or specific plans may result in revocation of recognition as referenced in Policy 600-24. Consistent failure to provide input on private development applications or public infrastructure projects may result in revocation of recognition. Further, that such a determination resulting in the forfeiture of rights to represent its community for these purposes will be made by the Council upon the recommendation of the Mayor or their Designee. (Reference Section 2)

### **9. Collective Action of Uptown Planners**

The official positions and opinions of Uptown Planners will not be established or determined by any organization other than Uptown Planners, nor by any individual voting member or committee of Uptown Planners.

## **10. Term of the Operating Procedures**

These Operating Procedures will be effective in perpetuity of the life of Uptown Planners unless recognition of Uptown Planners is revoked by the City as described in Section 8.4 or these Operating Procedures are updated to be consistent with Policy 600-24 as it may be amended. Proposed amendments shall be submitted to the offices of the Mayor and City Attorney for review and approval. Any proposed amendments that are inconsistent with Council Policy 600-24 shall not be approved by the Mayor and City Attorney and shall be forwarded to the City Council President who shall docket the matter for Council consideration. Amendments to the Operating Procedures are not valid until approved by the City.

Attachments:

Exhibit A: [Boundaries of the Uptown Community](#)

Exhibit B: [Uptown Community Plan](#)

Exhibit C: [Community Participation and Representation Plan](#)



# **UPTOWN PLANNERS**

## **Participation & Representation Plan**

**Statement re: Accessibility**

**Statement re: Representation**



## **PARTICIPATION & REPRESENTATION PLAN**

The Uptown Planners Community Planning Group is committed to engaging a broad and diverse cross-section of our community members in monthly meetings and to electing Uptown Planners members who are representative of the community and community interests, including, but not limited to renters, youth, people with disabilities, and intergenerational households. Soliciting and obtaining broad input on projects and initiatives is critical to the success of Uptown Planners to serve as a recognized advisory body to the City.

The goal of this Participation and Representation plan is to communicate Uptown Planners' goals, guiding principles for outreach and communication, and a strategy for meaningful, ongoing engagement.

Our plan is crafted to reflect the unique demographics and characteristics of our community, referencing Plan Area (CPA) demographics provided by SANDAG's [Data Surfer](#) website.

**NOTE:** In place of exhibits, details and examples are provided in the attached statements and on the Uptown Planners website: <https://uptownplannersd.org/>

### **Overarching Goal**

- Educate community members about the role of Uptown Planners and opportunities for involvement.
- Establish partnerships with non-profits, community organizations, businesses, schools/universities, and government organizations to build relationships and trust with the community.
- Increase and diversify participation in monthly Uptown Planners meetings and decision-making.
- Communicate about Uptown Planners' work and goals in simple, easy-to-understand language that is accessible for anyone regardless of their background in or knowledge of community planning.
- Obtain meaningful input from a broad range of community members on land use matters (e.g., General Plan and Community Plan Amendments, Community Plan Updates, project reviews, and other land use matters referred to them by the City).
- Be proactive in listening to community needs and effectively communicating them to the City.

## **Guiding Principles for Public Participation**

- Provide all meeting information necessary to encourage community members to participate in a simple and accessible manner.
- Communicate in ways that are inclusive, transparent and respectful.
- Consistently share information with community members using a variety of methods.
- Make meeting materials available in the languages spoken within the community, referencing Census data for Community Plan Area (CPA) provided by SANDAG's [Data Surfer](#) website.
- Be respectful of people's opinions and time. Established ground rules for codes of conduct are included in the Uptown Planners Operating Procedures.

## **Strategies for Community Involvement**

- Create a simple Uptown Planners flyer to advertise in community hubs with meeting information included to help educate the community on the role of Uptown Planners, how to get involved, and the benefits of serving on a Planning Group.
- Share meeting information in digital formats including social media sites and the dedicated Uptown Planners website.
- Consistently post printed monthly meeting information at local places including, but not limited to:  
Local libraries, park and recreation buildings, public transit hubs, grocery stores, coffee shops, and schools.
- Build relationships with other city advisory boards to cross-pollinate messaging.
- Set up informal meetings or calls with local non-profit organizations to introduce and discuss Uptown Planners' role and to build relationships.
- Advertise monthly meetings and elections in local community media.
- Host informal events outside of Uptown Planners meetings to invite the public to learn about the Planning Group and how to participate in monthly meetings.
- Organize informal town hall events to solicit feedback on community needs. Select a time/ day, location and format of the events and town halls that maximizes the opportunity for people not already engaged with the Planning Group to attend.
- Work with the council office and the Mayor's office to amplify outreach.
- Make online interactive activities, such as surveys, to seek input on community needs/ other initiatives.

- Monitor month-over-month and year-over-year meeting attendance, number of voters in elections, social media metrics as applicable, type and frequency of outreach efforts, events attendance lists, change in composition of voting members as evidenced in annual surveys, etc.
- Qualitatively measure overall success by the intentional efforts made to bring in community members who have historically faced barriers to participation in Planning Groups. Document information in annual report and submit to the City via email: [SDPlanningGroups@sandiego.gov](mailto:SDPlanningGroups@sandiego.gov) within 14 days of the approval of the March minutes.

**STATEMENT RE: ACCESSIBILITY** (maximum 500 words)

**Application requirement:** Please provide five (5) examples of efforts that your organization will employ to broadly share and publicize the opportunity to participate in the Planning Group and engage the overall community about land use-related issues.

1. Continued maintenance of our website: <https://uptownplannerssd.org>  
Repository for information about what we do, scheduled meetings and agendas, board membership, committees, reference documents (Operating Procedures, Community Plan, meeting minutes, etc.), election recruitment and voting, developer application process, meeting locations, etc., along with encouragements for community participation. Includes contact info and a way to sign up for our mailing list.
2. Continued active use of our mailing list for sending out notices of meetings, elections, etc., including recruiting candidates to become members of the board. Currently maintained on Mailchimp with 310 members on the contact list.
3. Continued postings to social media accounts on Facebook, Twitter/X, and Instagram, which receive all informational notices sent out on our mailing list.
4. Continued physical postings of agendas, candidate recruitment appeals, and election info at a variety of locations in Uptown, including stores, restaurants, libraries, and other public locations. All board members are requested to post at venues that they and others in their community frequent, in order to disseminate information throughout the various neighborhoods in Uptown.
5. Continued mutually informational contacts with other organizations in Uptown, including but not limited to neighborhood resident and business associations (such as Bankers Hill Community Group, University Heights Association, Mission Hills Town Council, Mission Hills Heritage, Hillcrest Town Council, Hillcrest Business Association); public and quasi-governmental agencies (such as parking districts, nearby CPGs, Balboa Park Committee, Airport Noise Advisory Committee); and relevant media outlets and publications (such as Presidio Sentinel, UHCA News).

## **STATEMENT RE: REPRESENTATION** (maximum 500 words)

**Application requirement:** Please explain how your Planning Group's member composition is representative of the diverse interests in your community.

Our current members represent all six of our Uptown neighborhoods: University Heights, Mission Hills, Medical Center, Bankers Hill, Hillcrest, and Middletown.

Our current members qualify based upon residency—both as renters and as owners—and others qualify as representatives of local businesses. Some work in Uptown, as well.

Our current members include both some who have been part of our Uptown community for decades, bringing knowledge and experience concerning local issues to the board, and others who have joined in our community just in the last several years, bringing new perspectives based on their recent experiences living in other locations that may have faced similar challenges and opportunities.

Our current members include some who also are or recently have been active members and/or leaders in other community organizations for residents and/or businesses and/or in local or regional public or quasi-governmental committees or advisory groups. That exposure allows board members to educate one another about a range of concerns among those whom we represent on our board.

Our current members include some who are employed (working either from home or in office settings) and others who are retired, along with a number who are or recently have been engaged in volunteer efforts for service and/or advocacy.

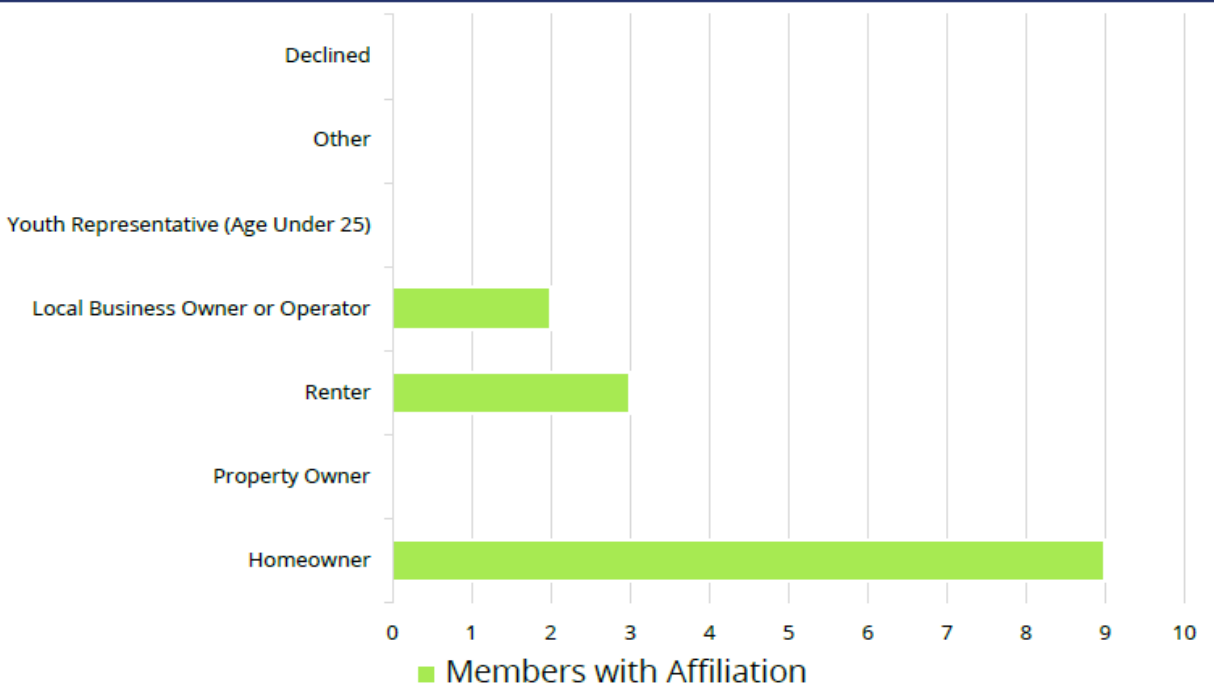
Our current members have or have had careers in a range of occupations, and they hold a variety of professional qualifications, educational degrees, and/or licensure or training credentials.

Our current members include a mix of racial, ethnic, and gender identifications; sexual orientations; family responsibilities and living situations (alone or with others, married and unmarried, with and without dependents, etc.); physical abilities; language proficiencies; personality types; ages; incomes; and political affiliations.

Most importantly, our current members were elected by hundreds of individuals in Uptown who chose them to represent not just (or even primarily) their demographics but, instead, their views and preferences regarding land use and development in Uptown. In our board's lively debates concerning community issues, our members may express unanimity on some topics, but we often significantly disagree on others of substance. There is no single ideological identity or label that collectively fits all the current members of our board.

However, there is one thing that every single one of our current members has in common: an open mind and an intention to serve the best interests of our diverse population in Uptown.

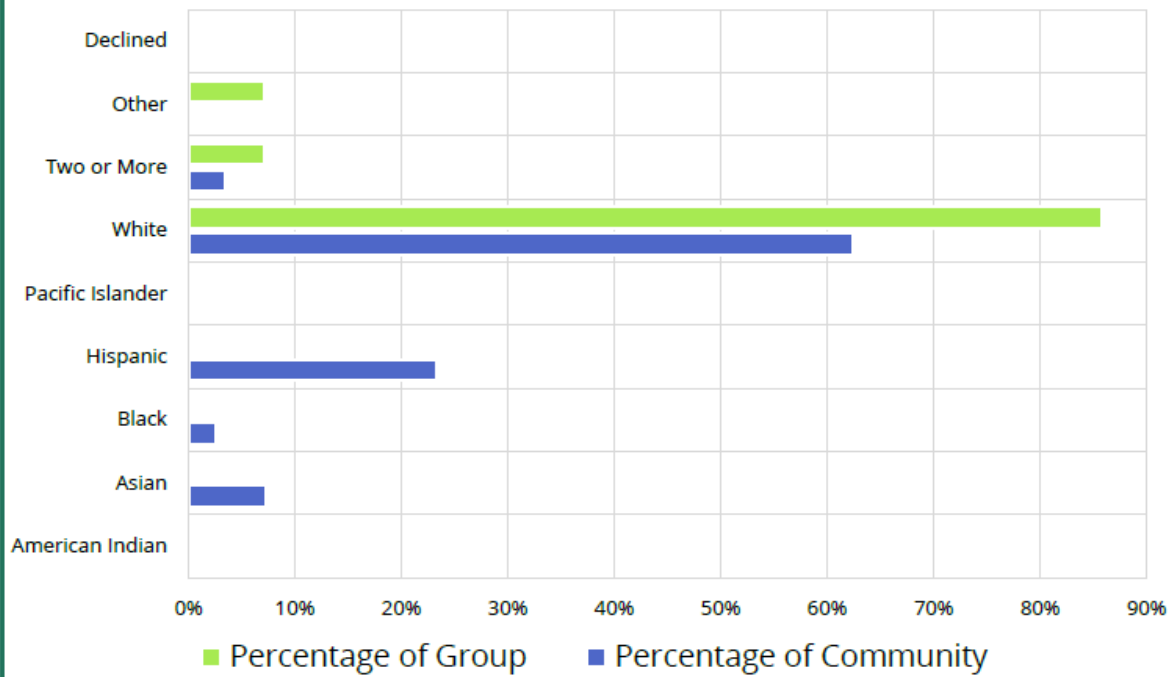
**UPTOWN PLANNERS - COMMUNITY AFFILIATION**



Community Affiliation	Members with Affiliation
Homeowner	9
Property Owner	---
Renter	3
Local Business Owner or Operator	2
Representative (Age Under 25)	---
Other	---
Declined	---
<b>Total</b>	<b>14</b>

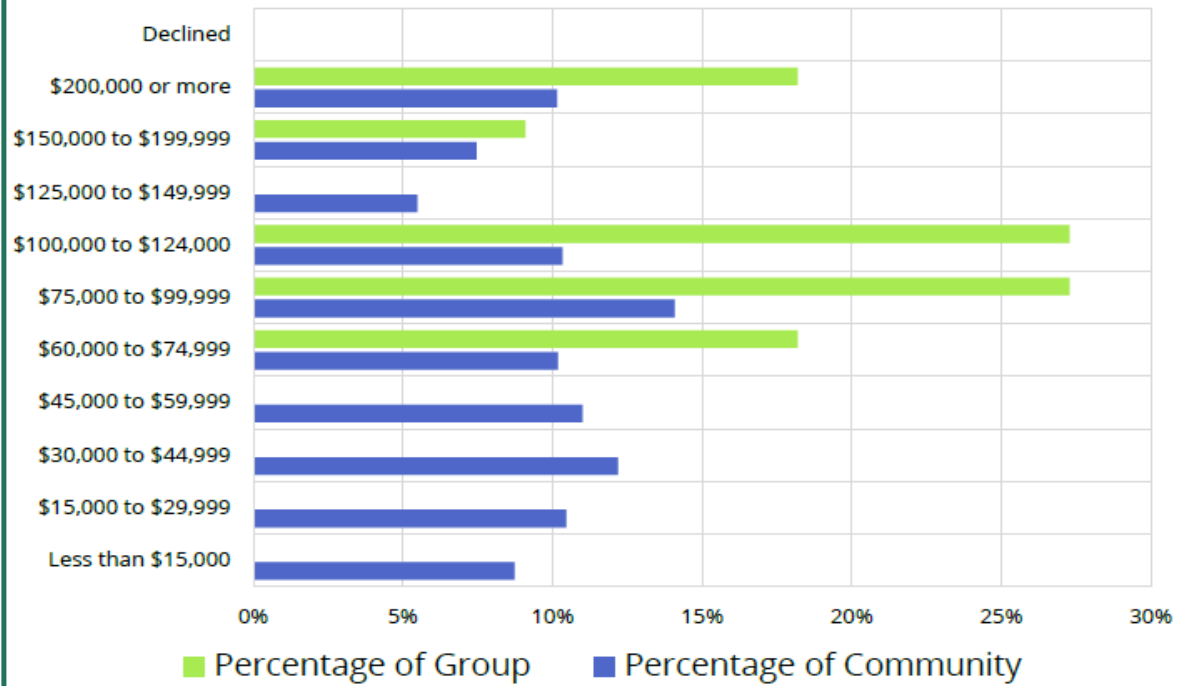


## UPTOWN PLANNERS - RACE/ETHNICITY



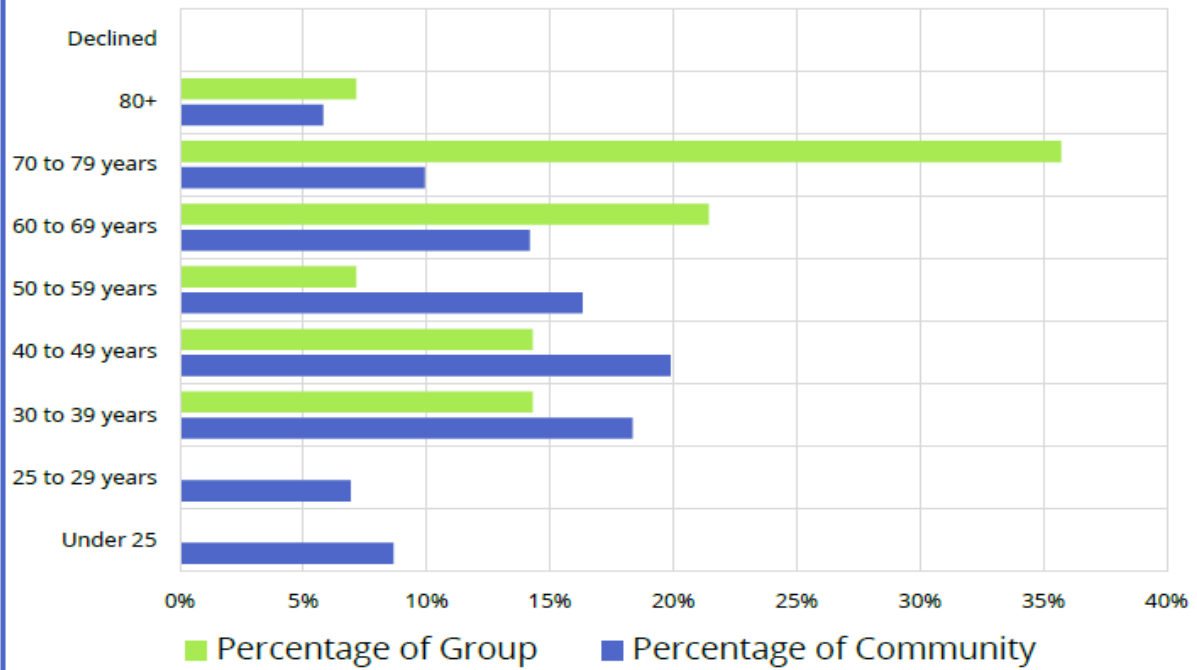
Race/Ethnicity	Member Count	Percentage of Group	Percentage of Community
American Indian	---	---	0.4%
Asian	---	---	7.3%
Black	---	---	2.6%
Hispanic	---	---	23.3%
Pacific Islander	---	---	0.4%
White	12	85.7%	62.4%
Two or More	1	7.1%	3.4%
Other	1	7.1%	0.2%
Declined	---	---	---
<b>Total</b>	<b>14</b>	<b>100.0%</b>	<b>100.0%</b>

## UPTOWN PLANNERS - HOUSEHOLD INCOME



Household Income	Member Count	Percentage of Group	Percentage of Community
Less than \$15,000	---	---	9%
\$15,000 to \$29,999	---	---	10%
\$30,000 to \$44,999	---	---	12%
\$45,000 to \$59,999	---	---	11%
\$60,000 to \$74,999	2	18%	10%
\$75,000 to \$99,999	3	27%	14%
\$100,000 to \$124,000	3	27%	10%
\$125,000 to \$149,999	---	---	5%
\$150,000 to \$199,999	1	9%	7%
\$200,000 or more	2	18%	10%
Declined	---	---	---
<b>Total</b>	<b>11</b>	<b>100%</b>	<b>100%</b>

## UPTOWN PLANNERS - AGE



Age	Member Count	Percentage of Group	Percentage of Community
Under 25	---	---	9%
25 to 29 years	---	---	7%
30 to 39 years	2	14%	18%
40 to 49 years	2	14%	20%
50 to 59 years	1	7%	16%
60 to 69 years	3	21%	14%
70 to 79 years	5	36%	10%
80+	1	7%	6%
Declined	---	---	---
<b>Total</b>	<b>14</b>	<b>100%</b>	<b>100%</b>