# How to Establish and Permit Master Plan Residential Phased Development for Single Dwelling/Duplex Unit

**INFORMATION BULLETIN**

**114**

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This information bulletin describes the process of establishing master plans for the phased development of single dwelling/duplex units on single lots. For information on establishing master plans for miscellaneous structures, such as swimming pools and stairs, see Information Bulletin (IB) 114a, "How to Establish Master Plans for Miscellaneous Structures."

## What is a Residential Phased Development?

Master Plan Residential Phased Development allows for the review and approval of construction documents for different plan types, with or without options, for single dwelling/duplex units under the following two process types:

A. **One-Step Process | master plan Residential Phased Development**
The One Step Process allows Master Plan Establishment, Models, Temporary Sales Office, and Master Plan Production Unit (s) to be reviewed and approved in one set of construction documents with an approved phasing plan. The phasing plan will show lot lines, the footprint of each unit on each lot, streets and the boundaries of each construction phase. The phasing plan will allow the applicant to obtain construction permits at different times utilizing the approved phasing plan. The One Step Process is the most efficient process for projects that meet the prerequisites identified in Table A - Prerequisites for Project Submittal and Table B - Prerequisites for Permit Issuance.

B. **Multiple-Step Process |Master Plan Establishment, Model, Temporary Sales Office and Master Plan Production Unit (s)**
This is an alternate process that involves multiple steps. The first step would be a Master Plan Establishment Project submittal. This allows for the review and approval of construction documents for different plan types, with or without options, for single dwelling/duplex units. After the Master Plan Establishment Project is approved and issued, the applicant may submit the architectural site plan to obtain construction permits for the models and/or Production Phase Units. The model homes may be submitted with the establishment of the master plan in the first step or submitted once the master plan establishment is approved.

## Selecting your Preferred Process

Which is the best process for your project? Each project is unique; depending on the project's goal and timeline, an applicant may select the One-Step Process or Multiple-Step Process. TABLE A—Prerequisites for Project Submittal and TABLE B—Prerequisites for Permit Issuance are intended to guide you in selecting the process that best suits your project needs.

### Table A-Prerequisites for Project Submittal

| One-Step Process | | Multi-Step Process | | |
|---|---|---|---|---|
| **Prerequisites** | **Phased Development (Master Plan Establishment & Production in One)** | **Master Plan Establishment** | **Models[1]** | **Master Plan Production(s)** |
| **Phasing Plan** | R | NR | NR | NR |
| **Table for Valuation/Chargeable Square Footage for School Fee& Building Permit** (See sample below.) | R | R | NR | NR |
| **Table for Lot-Specific Conditions** (See sample below.) | R | R | NR | NR |
| **Table for Floor Area Ratio** (See sample below.) | R | NR | R | R |
| **Individual Lot-Specific Site Plan Drawing** | R | NR | R | R |
| **Application Expiration** | All permits must be obtained within two years of the deemed complete date or apply for a 180-day extension using the Building Permit Application Extension Form (DS-4102). | The Master Plan will expire with the City's adoption of a new California Building Code. | | All Master Plan Production Units must be obtained prior to the expiration of the Master Plan. |

***Legend:** R=Required, N/R= Not Required*
**Models may be submitted at the same time when establishing Master Plan.*

### Table B-Prerequisites for Permit Issuance

| One-Step Process | | Multi-Step Process | | |
|---|---|---|---|---|
| **Prerequisites** | **Phased Development (Master Plan Establishment & Production in One)** | **Master Plan Establishment** | **Models[1]** | **Master Plan Productions (s)** |
| **Final Map Recorded[2]** | R | NR | R | R |
| **Grading Permit Issued** | R | NR | R | R |
| **Foundation Design Identified** | R | R | R | R |
| **Lots with Brush Management Alternative Compliance Identified** | R | R | R | R |
| **Has an Approved Master Plan** | NR | NR | R | R |

**Legend:** *R=Required, N/R=Not Required*

[1] *May be submitted at the same time when establishing a Master Plan.*
[2] *If the Final Map is not recorded, model homes may be constructed with a recorded Consent of Judgement Agreement.*

## Submittal Requirements

All forms, documents and applications must be submitted electronically once a project number is given. Visit sandiego.gov/DSD to begin the submittal process. Additional information, including a detailed User Guide, is also available. Provide the following forms/documents:

A. **Plan and Documents**
The Submittal Requirement Matrix below identifies the forms, documents, and plans that are required.

B. **Temporary Sales Office**
The conversion of a portion of the single dwelling unit, typically the garage, into a temporary sales office, may be permitted during the establishment of the master plan and requires:

1. A floor plan showing the temporary sales office and floor plan for conversion back to permanent use (e.g., garage use).
2. Identification as to which unit will include the temporary sales office.
3. Fire sprinkler plans for the temporary sales office.
4. A site plan showing accessible parking spaces(s) and accessible path of travel from such parking space(s) to the sales office, in compliance with the accessibility provisions of California Building Code (CBC), Chapter 11B, as applicable. The required accessible unisex toilet facility can be provided by one of the following:
   A. Providing an accessible premanufactured portable unisex toilet facility.
   B. Constructing a temporary accessible unisex toilet facility in the garage.
   C. One of the bathrooms in the permanent house is an accessible unisex toilet located on a route from the sales office.
5. Landscape plans for temporary Vehicular Use Area per San Diego Municipal Code (SDMC) §142.0408. As a condition of the final inspection of the dwelling, the temporary sales office will be required to be removed and the space converted to its permanent use as identified on the approved plans.

**Table C-Submittal Requirement Matrix**

| | One Step Process | Two Step Process | | |
|---|---|---|---|---|
| | **Phased Development (Master Plan Establishment & Production in One)** | **Master Plan Establishment** | **Models[3]** | **Master Plan Production(s)** |
| **General Application Supplemental DS-3032A[1]** | R | R | R | R |
| **Water Meter Data Card (DS-16 and DS- 16A)[1]** | R | R | R | R |
| **Storm Water Checklist (DS-560)[1]** | R | NR | R | R |
| **Affordable Housing Checklist (DS-530)[1]** | R | NR | R | R |
| **Site Plan Package[1]** | R | R | R | R |
| **Architectural Package[1]** | R | R | NR | NR |
| **Structural Package[1]** | R | R | NR | NR |
| **Landscape Construction Package[1]** | R | R | R | R |
| **Brush Management Plan[1]** | R | R | R | R |
| **Title 24 Energy Documentation[1]** | R | R | NR | NR |
| **Structural Calculations** | R | R | NR | NR |
| **Truss Plans and Calculations[1]** | R | R | NR | NR |
| **Residential Fire Sprinkler System[2]** | R | R | NR | NR |
| **Geotechnical Investigation Report[1]** | R | R | R | R |
| **Other Technical Studies[1]** | R | R | NR | NR |

| | | | | |
|---|---|---|---|---|
| **Reference Materials**<br>Provide a copy of the recorded Final Map or Tentative Map, the approved grading plans, public improvement plans and prior discretionary approval documentation if applicable in .pdf format | R | R | R | R |
| **Phasing Plan**<br>The phasing plan is a geographic representation of the work limits for each construction phase (including private streets) and may be included with the architectural site plan. | R | NR | NR | NR |

***Legend:*** *R = Required, N/R = Not Required.*

*[1] See Section 2A of the Land Development Manual, Project Submittal Requirements PDF for a detailed description of the required content.*

*[2] For a detailed description of the content of each of the required forms, documents and plans, see IB-124, "How to Obtain a Permit for Residential Fire Sprinklers."*

*[3] May be submitted at the same time when establishing Master Plan.*

**Sample - Valuation/Chargeable Square Footage for School Fee**

| **Master Plan # 123456** | **Building Valuation Square Footage** | | | | | **Chargeable Square Footage** | |
|---|---|---|---|---|---|---|---|
| | **1st Floor** | **2nd Floor** | **Garage** | **Patio Cover** | **Deck** | **School Fee[1]** | **Building Permit[2]** |
| **Plan Type 1 (base only, no options)** | 1,200 | 900 | 600 | 150 | 100 | 2,100 | 2,950 |
| **A: Opt. Office in lieu of 3 Car Garage** | 200 | | -200 | | | +200 | +0 |
| **B: Opt. Detached Guest Quarter** | 500 | | | | | +500 | +500 |
| **C: Opt. Deck Extension** | | | | | 200 | +0 | +200 |
| **Plan Type 2 (base only, no options)** | 1,300 | 1,100 | 700 | 200 | 150 | 2,400 | 3,450 |
| **A: Opt. Pantry in lieu of 3 Car Garage** | 150 | | -150 | | | +150 | +0 |
| **B: Opt. Patio Cover Extension** | | | | 100 | | 0 | +100 |
| **Plan Type 3 (base only, no options)** | 1,400 | 800 | 700 | 200 | 100 | 2,200 | 3,200 |
| **A: Opt. Bedrm 4 in lieu of 3 Car Garage** | 200 | | | | | +200 | +0 |

*[1] Assessable space" is subject to school fees. The California Government Code defines "assessable space" as all of the square footage within the perimeter of a residential structure, not including any carport, walkway, garage, overhang, patio, enclosed patio, detached accessory structure or similar area. See IB-146 PDF for details.*

*[2] Total square footage of building footprint, which is included in the permit and subject to inspection*

C. Valuation/Chargeable Square Footage for School Fee Table
This table is required for the One Step Process or the Master Plan Establishment (Multiple Step Process). Do not include this table on Model or Master Plan Production Phase (s) in the Multiple Step Process.

D. Lot Specific Conditions Table
Each lot included in the master plan has conditions that are unique to that lot, such as foundation type due to different soil conditions. In addition, the lot may have encroachments into brush zones that may have been approved during the discretionary permit using alternative

compliance measures. The Lot Specific Conditions Table must be provided on the cover sheet of the phasing plan (One Step Process) and on the Master Plan Establishment submittal (Multiple Step Process). This table should not be provided on the model and/or production phase plans in the Multiple-Step Process. The primary purpose of the Lot Specific Conditions Table is to assist contractors and inspectors in identifying those lots that have unique construction requirements.

**Sample – Lot-Specific Conditions Table**

| Phase | Lot No. | Project Address | Foundation Type[1] | Geo Req.[2] | Brush Mgmt. Plans-Alt. Compliance[3] | | Very High Fire Hazard Severity Zone |
|---|---|---|---|---|---|---|---|
| | | | | | Windows | Walls | |
| 1 | 55 | 1234 K St. | I | Required | | | Per Sheet A-25, A-40 |
| 1 | 56 | 1235 K St. | II | | Per Sheet A-25 | Per Sheet A-40 | Per Sheet A-25, A-40 |
| 1 | 57 | 1236 K St. | I | | Per Sheet A-25 | | Per Sheet A-25, A-40 |
| 2 | 58 | 1237 K St. | III | Required | | | |
| 2 | 59 | 1239 K St. | II | | Per Sheet A-25 | | Per Sheet A-25, A-40 |

[1] *A number or letter matching recommended foundation requirements per soil conditions determined during the structural review.*

[2] *Indicates lots requiring an as-graded geotechnical report prepared in accordance with the City's "Guidelines for Geotechnical Reports" that specifically addresses the implementation of measures to avoid or mitigate geologic hazards on or adjacent to the subject lot(s). This report shall be submitted for review of production phase units.*

[3] *Indicates the location of special construction details required for those lots with alternative brush management or for lots located within the Very High Fire Hazard Severity Zone.*

**Sample - Floor Area Ratio for Zoning/Planning Purposes**

| Lot | Plan Size | Lot Size (square feet) | Proposed Floor Area Ratio[1] |
|---|---|---|---|
| 55 | 1 | 5,800 | 63.93% |
| 56 | 2 | 5,500 | 65.45% |
| 57 | 1 | 5,800 | 62.93% |
| 60 | 1 | 5,500 | 65.45% |

[1] *Where the proposed FAR is based upon a cumulative average for all lots within a subdivision and not on an individual lot basis per an approved development permit, provide a footnote to this effect.*

E. **Floor Area Ratio Table**
The Floor Area Ratio Table is required on the cover sheet of the Phasing Plan (One-Step Process) and on the Model and Production Phase plans (Multiple-Step Process). The table should not be provided on the Master Plan Establishment Plans (Multiple Step Process). This table is used to identify the plan type being proposed on each lot at the time of building permit and includes the lot size and floor area ratio as defined in Land Development Code Section 113.0103. It is unnecessary to note the selection of approved options at this time. The selection of approved options will be documented at the end of the project using the Confirmation of As-Built Units form (DS -4101). See Section IX for more information.

## Review Process

As each reviewing discipline completes a review, they will email an Issues Report (if not approved) to the point of contact. The Issues Report will contain the reviewer's comments and instructions for resubmittal. Notify the project manager of any project's scope changes.

## Permit Issuance Process for Master Plan Residential Phased Development (One-Step Process)

To streamline the issuance process, a pre-permit issuance request is required three business days prior to permit issuance. Pre-permit issuance will allow time for the Project Manager to identify and resolve issues, perform all the necessary data entries and prepare packages for permit issuance. The applicant will be given an invoice of the fees and will also be notified if there are missing items or remaining issues to be resolved prior to permit issuance. Each phase shown on the approved set will require a building permit(s); however, the applicant may obtain building permits for each phase at different times utilizing the approved phasing plan. To obtain the first phase building permit(s), please submit:

A. Complete final versions of building construction plans that have been reviewed and approved by required review discipline(s).

B. Project Contacts Information (DS-345) and Supplemental General Application (DS3032A). PDF

C. Approved Water Meter Data Card (DS-16), and Supplemental Water Meter Data Card (DS-16A) PDF, one per plan type.

D. Waste Management Form, one per lot

E. Certificates of Compliance from the school district. One Certificate per lot.

To obtain building permits for subsequent phases, the applicant will need to submit

A. Supplemental General Application (DS3032A) PDF

B. .Waste Management Form for Construction & Demolition Debris (ES008), one per lot.

C. Certificates of Compliance from the school district. One Certificate per lot.

## Permit Issuance Process for Master Plan Establishment (Multiple Step Process)

To streamline the issuance process, a pre-permit issuance request to the assigned Project Manager is required three business days prior to permit issuance. Pre-permit issuance will allow time for the Project Manager to identify and resolve issues, perform all the necessary data entries and prepare documents for permit issuance. The applicant will be given an invoice of the plan check fees and will also be notified if there are missing items or remaining issues to be resolved prior to permit issuance.

Please submit:

A. Complete final versions of building construction plans that have been reviewed and approved by the required review discipline(s).

B. Complete final versions of building construction plans that have been reviewed and approved by the required review discipline(s).

C. Supplemental Water Meter Data Card (DS16A). PDF

## Permit Issuance Process For Model/ Master Plan Production Phase (Multiple Step Process)

To streamline the issuance process, a pre-permit issuance request to the assigned Project Manager is required three business days prior to permit issuance. Pre-permit issuance will allow time for the Project Manager to identify and resolve issues, perform all the necessary data entries and prepare documents for permit issuance. The applicant will be given an invoice of the plan check fees and will also be notified if there are missing items or remaining issues to be resolved prior to permit issuance.

Please submit:

A. Complete final versions of building construction plans that have been reviewed and approved by required review disciplines).

B. Project Contacts Information (DS-345) PDF and Supplemental General Application (DS-3032A). PDF

C. Approved Water Meter Data Card (DS-16) PDF and Supplemental Water Meter Data Card (DS-16A), PDF one per plan type.

D. Certificates of Compliance from the school district. One Certificate per lot.

## Construction Changes to an Established Master Plan

Construction changes must be approved prior to scheduling a final inspection on any permits under the one-step process or prior to submitting for additional production phase building permits (multiple-step process). The review of the construction change will be charged at the reviewers' hourly rate.

Prior to implementing the changes, all construction changes must be submitted to the City Structural Field Engineer at the Field Inspection office for review and approval process, except for the following changes, which must be submitted through the assigned project manager:

A. Change of Plan Type.

B. Change in building footprint.

C. Permanent BMPs.

D. Brush Management Alternative Compliance details.

E. Changes that impact energy requirements include fenestration type and size, water heater and HVAC.

F. Changes to fire sprinkler spacing and types.

See IB-118, "How to Process Construction Changes to Approved Plans PDF", for submittal requirements. Additionally, a tabulated detailed description of construction changes, the affected sheet and the regulations must be included with all construction changes for obtaining approval for changes to construction plans that have already been approved.

**Sample - Delta 3 Construction Changes**

| Brief Description of Changes | Affected Sheet(s) | Affected Requirements |
|---|---|---|
| **A window size in the master bedroom south wall changed from 2'-0"x 4'0" to 3'0"x 4'0"** | A 2.1.0 | Title 24 |
| **Post & beam connection detail at the northeast corner of the living room** | S 3.1.1 | CRC |
| **Wood pattern of garage door** | A 4.2.2 | N/A |
| **Archway added to rear porch** | A 4.2.3 | N/A |
| **Change plan type on lot 42** | A 1.1.0 | Land Development Code |
| **Provide Alternative brush management on lot 6** | A 1.3.1 | Land Development Code |

## Confirmation of As-Built Units

Most master plan projects include approved optional floor plan layouts for the buyers to select. These options may be selected after permit issuance. Master Plan projects that include options will require a completed Confirmation of As-Built Units form (DS-4101) to be submitted to the City Project Manager assigned to your project prior to final inspection. This form is necessary to document which options, if any, were constructed per the permitted Master Plan.

Most selected options will not trigger a review. However, when selected options are not identified at the time of permit issuance and involve changes to the building footprint, additional structures (e.g., detached guest house) or additional square footage (e.g., extended deck), a construction change process will be required.

## Fees

The following plan check fees must be paid prior to review unless otherwise indicated below. Inspection fees are due at permit issuance. See IB-501, "Fee Schedule for Construction Permits," for other submittal and issuance fees applicable to construction permits.

For your convenience, DSD offers online payments. Payment drop-off in a touchless drop safe can also be made in the first-floor lobby of the Development Services Center, located at 1222 First Ave. in Downtown San Diego. This safe is checked daily, and payments are processed the following business day. All payments must be in the exact amount, drawn on US banks, and be made out to the "City Treasurer." Please include in the memo of the check the invoice number or project number or attach the invoice to the check. Cash payments are only accepted by appointment; email DSDCashiers@sandiego.gov to schedule an appointment.

**Master Plan Single Dwelling/Duplex Unit Fees**

| | | Plan Check | | Inspection | | |
|---|---|---|---|---|---|---|
| **Approval Type** | **Base Sq. Ft.[1]** | **Base Rate** | **Increment Rate** | **Base Rate** | **Increment Rate** | **Increment Sq. Ft.** |
| **Master Plan Establishment** | 1-3,000 | $5,368.40 | $1.80 each additional<br>s.f. > 3000 | N/A | N/A | |
| **Master Plan Production** | 1-3,000 | $1,760.20 for the first unit | $659.20 each additional unit | | | |

*[1] For square footage between base square footage, multiply increment rate by square footage over increment square footage and add to the base rate. For example, for a 3,800 square-foot dwelling unit, the Master Plan Establishment plan check fee would be calculated as 800 x $1.80 + $5,368.40= $6,808.40.*

## Previous Versions of this Information Bulletin

This section contains previous versions of this Information Bulletin by the last day they were effective.

- 2024-12-31 | IB-114
- 2024-06-30 | IB-114