

How to Establish and Permit Master Plan Residential Phased Development for Multi-Dwelling Units (Buildings)

INFORMATION BULLETIN
115
 February 2024

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This information bulletin describes the process of establishing master plans for phased development of Multi-Dwelling Units (MDU) buildings. For information on "How to Establish Master Plans for Miscellaneous Structures", such as swimming pools and stairs, see [Information Bulletin \(IB\) 114](#). For information on How to Establish and Permit Master Plan Residential Phased Development for Single Dwelling/Duplex Units, see [Information Bulletin 114](#).

I. What is Master Plan Residential Phased Development (MDU)?

A Master Plan Residential Phased Development for MDUs allows for the review and approval of construction documents for different plan types, with or without options, for MDU Buildings under the following two process types:

- A. One Step Process-Master Plan Residential Phased Development**
- The One Step Process allows Master Plan Establishment for Models, Phases, Optional 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 building on the lot on the site plan, 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. 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.

II. 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.

III. Completeness Review

Multi-Dwelling Units Phase Permitting requires a submitted completeness review. The submitted completeness review allows city staff time to review the plans/documents for the required details and set up the project for review. The submitted completeness review typically takes five (5) working days. Submit all plans/documents as identified in the Submittal Requirements Matrix for submitted completeness review. After the completeness review, the assigned development project manager will notify the applicant via email whether the application is ready for full submittal or whether additional information/clarification is required.

IV. Submitting for a Permit

MDU projects requiring a building permit must be submitted electronically through the Accela online portal, avoiding Building Permit. In the application, select Building Construction- Master Plan MDU and select the request for Active Project Management to avoid delays. A kick-off meeting may be requested by the assigned development project manager during the submittal process prior to the completeness check.

Table A - Prerequisites for Project Submittal				
	One Step Process	Multiple 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 Table 1 below)	R	R	NR	NR
Table for Lot Specific Conditions (see sample Table 2 below)	R	R	NR	NR
Table for Floor Area Ratio (see sample Table 3 below)	R		R	R
Individual Lot Specific Site Plan Drawing	R	NR	R	R
Application Expiration	All permits must be obtained within two years of the application date. Additionally, two 180-day extensions of time (if approved).	Master Plan will expire with the City's adoption of a new California Building Code (CBC).		All Master Plan Production Units must be obtained prior to the expiration of the Master Plan.

Legend: R = Required, NR = Not Required.
¹Models may be submitted at the same time when establishing Master Plan.

Table B - Prerequisites for Permit Issuance				
	One Step Process	Multiple Step Process		
Prerequisites	Phased Development (Master Plan Establishment & Production in One)	Master Plan Establishment	Models ¹	Master Plan Production(s)
Final Map Recorded ²	R	NR	NR	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, NR = Not Required.
¹May be submitted at the same time when establishing a master plan.

If the Final Map is not recorded, model homes may be constructed with a recorded Consent of Judgment Agreement.

V. Submittal Requirements

All forms, documents, and applications must be submitted electronically. Visit the Development Services Department website to begin the submittal process. Additional information, including a detailed User Guide, is also available. Provide the following forms/documents:

- A. Plans and Documents. The Submittal Requirement Matrix below in Table C identifies the forms, documents, and plans that are required.
- B. Phasing Plan. For information on phased projects, please see [Information Bulletin 719](#).
- C. The project should identify the occupancy group Multifamily Group R-2 occupancy. Multifamily plans should identify which building or units will be Market Rate or Affordable.
- D. Temporary Sales Office. The conversion of a portion of the multi-dwelling unit, typically the garage, into a temporary sales office may be permitted during the establishment of the master plan and requires:
1. Floor plan showing the temporary sales office and floor plan for conversion back to permanent use (e.g., garage).
 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 space(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. Show clear width, length, slope (running and cross), surface type, passing spaces, handrail, and landings for the accessible route of travel.
 5. A plan indicating at least one accessible unisex toilet facility serving the sales office in compliance with CBC. 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 facility and on an accessible route from the sales office.
 6. 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 defined in the approved plans.

Table C – Submittal Requirement Matrix				
	One Step Process	Multiple Step Process		
	Phased Development (Master Plan Establishment & Production in One)	Master Plan Establishment	Models ³	Master Plan Production (s)
Project Contacts (DS-345) ¹	R	R	R	R
Water Meter Data Card (DS-16) ¹	R	R	R	R
Storm Water Checklist (DS-560) ¹	R	R	R	R
Affordable Housing Checklist (DS-530) ¹	R	R	R	R
Hazardous Materials Reporting Form (DS-165)	R	R	R	R
Site plan sheet ¹	R	R	R	R
Building Plans: Architectural, Structural, Mechanical, Electrical and Plumbing Sheets ¹	R	R	NR	NR
Landscape Construction Sheets ¹	R	R	R	R
Brush Management Plan ¹	R	R	R	R
Title 24 Energy Documentation ¹	R	R	NR	NR
Fire Sprinkler System & Calculations ²	R	R	NR	NR
Structural calculations	R	R	NR	NR
Truss Plans and Calculations ¹	R	R	NR	NR
Geotechnical Investigation Report ¹	R	R	R	R
Other Technical Studies ¹	R	R	NR	NR
Reference Materials – 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
Reference Materials- Phasing Plan. 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	R	NR	NR

¹ See [Section 2A of the Land Development Manual](#), [Project Submittal Requirements 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-139](#), [How to Obtain a Permit for Fire Sprinklers Systems.](#)

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

Legend: R = Required, NR = Not Required.

E. Valuation/Chargeable Square Footage for School Fee Table (see sample Table 1 below). 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.

F. Lot Specific Conditions Table (see sample Table 2 below). 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.

G. 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.

VI. 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 Assigned Development Project Manager of any project's scope changes.

VII. 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 Assigned Development 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 a building permit 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 [\(DS-345\)](#).
- C. Approved Water Meter Data Card [\(DS-16\)](#), one per plan type.
- D. [Waste Management Form for Construction & Demolition Debris \(E5008\)](#), One per Building.
- E. Certificates of Compliance from the school district. One Certificate per Building.
- F. Proof of Water & Sewer Payment.

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

- A. Project Contacts Information [\(DS-345\)](#).
- B. [Waste Management Form for Construction & Demolition Debris \(E5008\)](#), One per Building.
- C. Certificates of Compliance from the school district. One Certificate per Building.
- D. Proof of Water & Sewer Payment.

VIII. Permit Issuance Process for Master Plan Establishment (Multiple Step Process)

To streamline the issuance process, a pre-permit issuance request to the Assigned Development Project Manager is required three business days prior to permit issuance. Pre-permit issuance will allow time for the Assigned Development 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 which have been reviewed and approved by required review discipline(s).
- B. Water Meter Data Card.
- C. Certificates of Compliance from the school district. One Certificate per Building.
- D. Proof of Water & Sewer payment.

IX. 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 the following:

- A. Complete final versions of building construction plans which have been reviewed and approved by required review discipline(s).
- B. Project Contacts Information [\(DS-345\)](#).
- C. Approved Water Meter Data Card [\(DS-16\)](#).
- D. Certificates of Compliance from the school district. One per Building.

X. 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 Development Project Manager:

1. Change of Plan Type.
2. Change in building footprint.
3. Permanent BMPs.
4. Brush Management Alternative Compliance details.
5. Changes that impact energy requirements include fenestration type and size, water heater and HVAC.
6. Changes to fire sprinkler spacing and types.

See [IB-118](#), "How to Process Construction Changes to Approved Plans," 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.

XI. 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 optional will require a completed Confirmation of As-Built Units form [\(DS-4101\)](#) to be submitted to the Assigned Development 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. When selected options are not identified at the time of permit issuance, and those options 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.

XII. Fees

The following plan check fees are required to 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 through [OpenDSD](#). 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 Avenue in Downtown San Diego. This safe is checked daily, and payments are processed by 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 the invoice number or project number in the memo of the check or attach the invoice to the check. Cash payments are only accepted by appointment; email DSDCashiers@sandiego.gov to schedule an appointment.

Table 1: Sample - Valuation/Chargeable Square Footage for School Fee					
Master Plan # 123456	Building Valuation Square Footage		Chargeable Square Footage		
Building Type	# of Buildings	Garage SQ.FT.	Deck SQ. FT.	Habitable/School SQ.FT. ¹	Building Permit ²
4-Plex	10	1,666	268	6,718	8,652
5-Plex	6	2,084	339	8,219	10,642
6-plex	6	2,920	410	9,720	13,050
7-plex	7	2,920	475	11,312	14,707
8-plex	4	3,330	540	12,094	16,827

The above table is an example of how this can be made specific to your development

¹ Assessable space¹ is subject to school fees. The California Government Code defines the "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](#) for details.

² Total square footage of building footprint which is included in the permit and subject for inspection.

Table 2: Sample - Lot-Specific Conditions Table						
Phase	Building	Number	Foundation Type ¹	Geo. Req. ²	Brush Mgmt. Plans – Alt. Compliance ³	Very High Fire Hazard Severity Zone
					Windows	Walls
PH-1	3		Type III	Required	Per Sheet A-25	Per Sheet A-40
PH-2	2		Type III	Required	Per Sheet A-25	Per Sheet A-40
PH-3	1		Type III	Required	Per Sheet A-25	Per Sheet A-40

The above table is an example of how this can be made specific to your development

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 reviewed 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.

Table 3: Sample - Floor Area Ratio for Zoning/Planning Purposes					
Building Number	Lot Number	Units	Building Type	Building Floor Area (SF)	Maximum Structure Height (FT.)
1	Lot CC	957	A (4-Plex)	7389.4	30'4"
		958			
		959			
		960			
2	Lot GG	949	A (5-Plex)	1463.2	30'4"
		950			
		951			
		952			
3	Lot FF	925	A (6-Plex)	7389.4	30'4"
		926			
		927			
		928			
		929			
		930			

The above table is an example of how this can be made specific to your development

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.