



THE CITY OF SAN DIEGO



# ANNUAL REPORT for Fiscal Year 2020

## CIVITA MAINTENANCE ASSESSMENT DISTRICT

under the provisions of the

**San Diego Maintenance Assessment District Procedural Ordinance  
of the San Diego Municipal Code**

**Prepared For  
City of San Diego, California**



**Prepared By  
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**June 2019**

# **CITY OF SAN DIEGO**

## **Mayor**

Kevin Faulconer

## **City Council Members**

Barbara Bry  
District 1 (Council President Pro Tem)

Jennifer Campbell  
District 2

Chris Ward  
District 3

Monica Montgomery  
District 4

Mark Kersey  
District 5

Chris Cate  
District 6

Scott Sherman  
District 7

Vivian Moreno  
District 8

Georgette Gómez  
District 9 (Council President)

## **City Attorney**

Mara W. Elliott

## **Chief Operating Officer**

Kris Michell

## **City Clerk**

Elizabeth Maland

## **Independent Budget Analyst**

Andrea Tevlin

## **City Engineer**

James Nagelvoort

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## **EXHIBITS**

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for Fiscal Year 2020

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# Annual Report for Fiscal Year 2020

## Civita

### Maintenance Assessment District

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#### Preamble

Pursuant to §65.0220 of the “San Diego Maintenance Assessment District Procedural Ordinance” (being Division 2, Article 5, Chapter 6 of the *San Diego Municipal Code*) and City of San Diego Council Resolution No. R-310618 passed on July 22, 2016, authorizing the continued levy of assessments for the life of the CIVITA MAINTENANCE ASSESSMENT DISTRICT (hereinafter referred to as “District”), and in accordance with applicable provisions of “Proposition 218” (being Article XIID of the California Constitution), and provisions of the “Proposition 218 Omnibus Implementation Act” (being California Senate Bill 919) (the aforementioned provisions are hereinafter referred to collectively as “applicable law”), and in accordance with Resolution No. \_\_\_\_\_, adopted by the CITY COUNCIL OF THE CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, STATE OF CALIFORNIA, and in connection with the annual proceedings for the District, EFS Engineering, Inc., as Assessment Engineer to the City of San Diego, submits herewith this annual report for the District as required by §65.0220 of the “San Diego Maintenance Assessment District Procedural Ordinance.”

DATE OF FINAL PASSAGE BY THE CITY OF SAN DIEGO,  
COUNTY OF SAN DIEGO, STATE OF CALIFORNIA, ON THE  
\_\_\_\_\_ DAY OF \_\_\_\_\_, 2019.

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Elizabeth Maland, CITY CLERK  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

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## Executive Summary

**Project:** Civita  
Maintenance Assessment District

**Apportionment Method:** Equivalent Benefit Unit (EBU)

	<b>FY 2019</b>	<b>FY 2020 <sup>(1)</sup></b>	<b>Maximum <sup>(2)</sup> Authorized</b>
<b>Total Parcels Assessed:</b>	606	809	--
<b>Total Estimated Assessment:</b>	\$420,980	\$866,913	--
<b>Total Number of EBUs:</b>	1,118.63	2,003.23	--
<b>Assessment per EBU:</b>	\$376.34	\$432.76	\$432.76 <sup>(3)</sup>

<sup>(1)</sup> FY 2020 is the City's Fiscal Year 2020, which begins July 1, 2019 and ends June 30, 2020. Total Parcels Assessed, Total Estimated Assessment, and assessment apportionment factors may vary from prior fiscal year values due to parcel changes and/or land use re-classifications.

<sup>(2)</sup> Maximum authorized assessment rate subject to cost-indexing as approved by property owners at the time of District formation.

<sup>(3)</sup> Prior fiscal year's maximum authorized annual assessment rate increased by cost-indexing factor of 7.71%.

**Annual Cost-Indexing:** The maximum authorized assessment rates are cost-indexed and will increase (or decrease) annually based on the annual change in the *San Diego Consumer Price Index for Urban Consumers* (SDCPI-U) plus 4%.

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## Background

The Civita Maintenance Assessment District (District) was established by the City of San Diego (City) on October 23, 2013 by City Council Resolution R-308497. The Civita development area is generally shown in **Figure 1**. The purpose of the District was, and still is, to fund specifically identified improvements and activities within the boundary of the District.

In conformity with §65.0221 of the “San Diego Maintenance Assessment District Procedural Ordinance,” the City adopted Resolution No. R-310618 on July 22, 2016, approving the annual budget and assessments for Fiscal Year 2017, and authorizing the levy of the assessments for the life of the District, consistent with the benefit findings and assessment apportionment method contained in the approved formational and all subsequently updated Engineer’s Reports (Engineer’s Reports). The Engineer’s Reports are on file with the City Clerk, and incorporated herein by reference.

The District is authorized and administered under the provisions of the “San Diego Maintenance Assessment District Procedural Ordinance.” This annual report has been prepared pursuant to the requirements of §65.0220 of the “San Diego Maintenance Assessment District Procedural Ordinance.”

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## District Boundary

The District boundary is generally depicted in **Exhibit A**. The District Boundary Map and Assessment Diagram are on file in the Maintenance Assessment Districts section of the Parks and Recreation Department of the City, and, by reference, are made a part of this annual report.

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## Project Description

The authorized assessments will be used to fund specifically identified improvements and activities within the District. The District improvements and activities generally consist of maintenance and servicing of landscaped and hardscaped medians, landscaped and hardscaped parkways (rights-of way), streetscape areas, decorative crosswalks, enhanced streetlights and landscape lighting, sidewalks and gutters, and community banners, signage and monumentation in the District. The approximate location of the improvements is generally shown in **Figure 2**.

For additional detail as to the location, type of improvements, and

activities performed by the District, please refer to the maps, improvement plans, engineering drawings, maintenance specifications, the Engineer's Reports and other associated documents on file with the Maintenance Assessment Districts section of the Parks and Recreation Department of the City. These documents, collectively, are incorporated herein by reference and made part of this annual report.

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## Separation of General and Special Benefits

The identified improvements and activities provide benefits to the parcels located within the District. These benefits are "special benefits" to the extent that they are above and beyond the City's standard level of service, and exclusive of those "general benefits" provided to the public at large or properties located outside the District. By law, only "special benefits" are assessable.

The assessments presented in this annual report are based on the cost of improvements and activities determined to provide "special benefits" in accordance with the Engineer's Reports. For additional detail relative to the separation and quantification of general and special benefits for the District, please refer to the Engineer's Reports, on file with the Maintenance Assessment Districts section of the Parks and Recreation Department of the City.

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## Cost Estimate

The estimated annual budget (Revenue & Expense Statement) for Fiscal Year 2020 (July 1, 2019 to June 30, 2020 period) is included as **Exhibit B**. The "Other Contributions (Non Assessment Source)" revenue contained in the budget includes the value of improvements and activities determined to provide "general benefits." The District budget with full detail is available for public reference in the Maintenance Assessment Districts section of the Parks and Recreation Department of the City.

## Annual Cost-Indexing

The maximum authorized assessment set forth in the Engineer's Reports is permitted to increase annually based on the published change in the "San Diego Consumer Price Index for Urban Consumers" (SDCPI-U) plus 4%. The annual change in second half SDCPI-U values, as compiled by the *U.S. Bureau of Labor Statistics* (see [www.bls.gov](http://www.bls.gov)), for the prior year period was 284.464 to 295.018 (a 3.71% increase). In accordance with the approved cost-indexing provisions, the maximum authorized assessment rates have been increased by 7.71%.

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## Method of Apportionment

### Estimated Benefit of Improvements

The *Quarry Falls Specific Plan* (Specific Plan), the Mission Valley Community Plan (Community Plan), the City of San Diego Land Development Code and the general policy recommendations found in the City's *Progress Guide & General Plan* (General Plan) establish several goals, objectives, and guidelines for the planned development of the community. Collectively, these Plans make specific reference to the following noteworthy objectives and recommendations:

- Develop a community that responds to the natural and created attributes of the project site by placing primary focus on the creation of an interactive system of public parks and open space.
- Encourage pedestrian activity through a logical connection of trails, sidewalks, and bicycle facilities.
- Design individual development projects that positively contribute to the character of the City of San Diego and reinforce community identities through control of project design elements such as architecture, landscaping, walls, fencing, lighting and signage.
- Develop an environment that is visually attractive and efficiently and effectively organized, including visually pleasant landscaping.
- Encourage sustainability in design to foster “green” development that reduces energy needs and water consumption.
- Improve the water quality of site run-off through sustainable design features, such as a natural bioswale.

The proposed improvements and activities are consistent with these objectives. The City's General Plan and Community Plan support the establishment of community-based improvement and maintenance districts, such as this District, to fund installation and maintenance of enhanced improvements and activities.

The proposed improvements and activities are generally located in the public rights-of-way along the various transportation corridors within the District. These transportation corridors serve as the primary access routes for inter-community and intra-community trips. Parcels within the District benefit from the improvements and activities in terms of enhanced aesthetics, community image and vitality, and public safety.

### Apportionment Methodology

The total cost associated with District improvement and activities will be assessed proportionally to the parcels in the District based on



Equivalent Benefit Units (EBUs). The total assessment for a given parcel is equal to the parcel's total EBUs multiplied by the Unit Assessment Rate as shown in the following equation:

$$\text{Total Assessment} = \text{Total EBUs} \times \text{Unit Assessment Rate}$$

### Equivalent Benefit Units (EBUs)

EBUs for each parcel have been determined as a function of parcel area (or number of residential units) and two factors – a Land Use Factor and a Benefit Factor – related as shown in the following equation:

$$\text{EBUs} = (\text{Acres, Building Area, or Units}) \times \text{Land Use Factor} \times \text{Benefit Factor}$$

Parcels determined to receive no benefit from the maintenance of District improvements and activities have been assigned zero (0) EBUs.

### Land Use Factor

Since the proposed District improvements and activities are primarily associated with the Transportation Element of the City's General Plan, Community Plan, and Specific Plan, trip generation rates for various land use categories (as previously established by the City's Transportation Planning section) have been used as the primary basis for the development of Land Use Factors. While these trip generation rates address vehicular trips, they are also considered to approximately reflect relative trip generation patterns for other modes of transportation (e.g., pedestrian trips, bicycle trips, etc.). Trip generation rates are a suitable measure for the relative intensity of use of the various land uses, and provide the required nexus and basis for assigning relative proportionality of potential benefit to the various land use/zoning classifications (as defined by the City's Municipal Code) within the District. Land use/zoning classifications have been grouped with averaged trip generation rates assigned to establish the Land Use Factors as shown in **Table 1**.

**TABLE 1: Land Use Factors**

<b>Land Use/Zoning</b>	<b>Code</b>	<b>Land Use Factor <sup>(1)</sup></b>
Residential – Single Family (detached)	SFD	1.0 per dwelling unit
Residential – Condominium	CND	0.8 per dwelling unit
Residential – Multi-Family & Apartment	MFR	0.6 per dwelling unit
Civic Buildings	CVC	3.0 per KSF <sup>(2)</sup>
Commercial – Office & Retail	COM	4.0 per KSF <sup>(2)</sup>
Educational – Primary & Secondary	EPS	5.0 per acre
Fire/Police Station	FPS	15.0 per acre
Fitness/Recreation Center	FIT	3.0 per KSF <sup>(2)</sup>
Industrial	IND	15.0 per acre
Open Space (designated)	OSP	0 per acre
Park – Undeveloped (recreation area)	PKU	0.5 per acre
Street/Roadway	STR	0 per acre
Undevelopable	UND	0 per acre
Vacant (developable)	VAC	0 per acre

<sup>(1)</sup> Proportional to trip generation rates contained in the City of San Diego *Trip Generation Manual* (May 2003).

<sup>(2)</sup> KSF equals 1,000 square feet of building area.

The purpose of designated open space and undevelopable areas is primarily to preserve natural landforms and habitat. While access for study and passive recreation is often permitted, these activities are allowed only to the extent they are consistent with the primary purpose of natural preservation. Since these lands are essentially “unused” in the customary terms of land use (which relate to human use and development), the trip generation rate is zero. Therefore, the designated open space and undevelopable lands receives no benefit from District improvements and activities and has been assigned a Land Use Factor of zero.

While those traveling the streets and roadways visually enjoy the enhanced improvements and activities being maintained by the District, the actual benefit accrues to the lands within the District not to the lands of the streets and roadways, themselves. Accordingly, the Streets/Roadways category receives no benefit and has been assigned a Land Use Factor of zero.

### **Benefit Factor**

The Land Use Factor described above establishes a proportionality of relative intensity of use (or potential use) for the various parcels of land within the District. It does not address the relationship of this use to the specific improvements and activities to be maintained by the District. This relationship is reflected in the Benefit Factor utilized in the assessment methodology.

In determining the Benefit Factor for each land use category, the subcomponents of the benefits of the improvements and activities in a district may include some or all of the following: public safety, view corridors and aesthetics, enhancement of community identity and recreational potential. The subcomponents used for this District are: aesthetics/community image and recreation/environmental quality.

As Benefit Factors and their subcomponents are intended to reflect the particular relationships between specific land uses within a district and the specific improvements and activities maintained by the district, Benefit Factors will generally vary from one district to another, based on the specific character and nature of the applicable land uses and improvements and activities being maintained. For a given land use, the overall Benefit Factor is equal to the sum of the subcomponent values. If a land use category receives no benefit from a subcomponent, then a value of zero is assigned to that subcomponent. A composite Benefit Factor of 1.0 indicates that full benefit is received. A value less than 1.0 indicates that less than full benefit is received.

The applicable benefit subcomponents and resultant composite Benefit Factors determined for the various Land Use/Zoning categories within this District are as shown in **Table 2**.

**TABLE 2: Benefit Factors by Land Use**

<b>Land Use/Zoning</b>	<b>Aesthetics/ Community Image (Max. 0.6)</b>	<b>Recreational/ Environmental (Max. 0.4)</b>	<b>Composite Benefit Factor (Max. 1.0)</b>
Residential – All	0.6	0.4	1.0
Civic Buildings	0.4	0.2	0.6
Commercial – Office & Retail	0.4	0.2	0.6
Educational – Primary & Secondary	0.2	0.2	0.4
Fire/Police Station	0.2	0.2	0.4
Fitness/Recreation Center	0.4	0.2	0.6
Industrial	0.2	0.2	0.4
Open Space (designated)	0.0	0.0	0.0
Park – Undeveloped	0.0	0.2	0.2
Street/Roadway	0.0	0.0	0.0
Undevelopable	0.0	0.0	0.0
Vacant (developable)	0.0	0.0	0.0

***Aesthetics/Community Image.*** The District improvements and activities provide enhanced aesthetics/community image. The degree of benefit received from this aspect of the improvements and activities varies among the land use categories. Generally, by nature of their use, residential lands receive the greatest benefit from aesthetic enhancement of the transportation corridors and community amenities. The remaining (non-residential) land uses are considered to receive a lesser degree of benefit from the aesthetic elements of the District improvements and activities, as such enhancements are not as critical to their function, use, or value.

***Recreational/Environmental.*** The District improvements and activities provide recreational opportunities and enhanced environmental quality. Residential land uses receive the greatest benefit from the recreational and environmental enhancement. Non-residential uses also benefit, though to a lesser degree, to the extent that such enhancements are an additional attractor to the area. Open Space, Street/Roadway, Undevelopable and Vacant (developable) land uses receive no benefit from recreational and environmental elements of the District improvements and activities, as such enhancements are not critical to their function, use, or value.

## Sample Calculations

As described above, the number of Equivalent Benefit Units (EBUs) assigned to each parcel in the District has been calculated based on each parcel's land use and the identified apportionment factors, as shown in the following equation:

$$\text{EBUs} = (\text{Acres or Units}) \times \text{Land Use Factor} \times \text{Benefit Factor}$$

Shown below are sample EBU calculations for several common land uses found in the District.

- **1 Single-Family Residence**  
EBUs = 1 unit x 1.0 x 1.0 = 1.00 EBUs
- **10-unit Apartment Complex**  
EBUs = 10 units x 0.6 x 1.0 = 6.00 EBUs
- **1,000 square-foot Commercial Property**  
EBUs = 1 KSF x 4.0 x 0.60 = 2.40 EBUs

The total assessment for each parcel in the District is based on the calculated EBUs for the parcel and the applicable unit assessment rate, as shown in the following equation:

$$\text{Total Assessment} = \text{Total EBUs} \times \text{Unit Assessment Rate}$$

Based on the above formula, the EBUs, unit assessment rate, and total assessment calculated for each property, can be found in the Assessment Roll (**Exhibit C**).

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## Summary Results

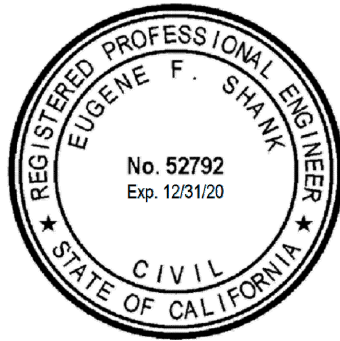
The District Boundary is presented in **Exhibit A**.

An estimate of the annual costs of the improvements and activities provided by the District is included as **Exhibit B**.

The assessment methodology utilized is as described in the text of this annual report. Based on this methodology, Fiscal Year 2020 District assessment for each parcel were calculated and are shown in the Preliminary Assessment Roll (**Exhibit C**).

Each lot or parcel of land within the District has been identified by unique County Assessor's Parcel Number in the Preliminary Assessment Roll and on the Boundary Map and Assessment Diagram referenced herein.

This annual report has been prepared and respectfully submitted by:



EFS ENGINEERING, INC.

Eugene F. Shank, PE

C 52792

Sharon F. Risse

# EXHIBIT A

**District Boundary**

# EXHIBIT B

**Estimated Budget – Revenue & Expense Statement  
for Fiscal Year 2020**



# EXHIBIT C

**Preliminary Assessment Roll  
for Fiscal Year 2020**