

# Planning



**Page Intentionally Left Blank**



## Department Description

The new Planning Department is responsible for the long-range planning of San Diego's communities and neighborhoods. The Department's work is divided into three divisions, two of which are administrative divisions and one of which is a separately funded program: Long-Range Planning (which includes community plan updates); Environmental & Resource Analysis (which includes citywide policies on environmental review, as well as historic review and other functions); and the Facilities Financing Program, which updates and monitors public facilities financing plans both in conjunction with community plan updates and separately.

For Fiscal Year 2015, the Long-Range Planning Division and Environmental & Resource Analysis Division are combined under one budgeted division: City Planning. Meanwhile, the Facilities Financing Program is reflected as a separate budgeted division. The Department's budget narrative is organized according to budgeted divisions and not according to organizational divisions/programs.

## Division Description

### Long-Range Planning

The Long-Range Planning Division is responsible for maintaining a comprehensive citywide General Plan, updating the City's community plans, and facilitating and monitoring implementation of those plans. The Division is also responsible for climate change and mobility planning, community plan amendments, community plan review of major development projects, community planning group support, administration of approximately \$17.7 million in grants, and collaboration with the Environmental Services Department on the Climate Action Plan update.

- The Community Planning Section works with City Council-recognized community planning groups and diverse stakeholders to update and amend community plans and maintain the General Plan and to review larger and complex development projects for conformance with community plans and the General Plan. The City has 52 community planning areas with 41 community planning groups. Nine comprehensive community plan updates are currently underway.

# Planning

- The Focused Planning and Implementation Section prepares focused community plan amendments to implement the General Plan City of Villages strategy, which is also referred to as Transit-Oriented Development (TOD) planning. The Section will expand the use of smaller area land use plans, such as specific plans, as an implementation tool and continue to proactively seek grant funding to facilitate the preparation and implementation of TOD plans. This section also reviews major development projects and supports planning groups in communities not currently undergoing comprehensive plan updates. There are currently three TOD-focused plan amendments underway, two of which are grant-funded. A fourth grant-funded TOD-focused plan for the Balboa Avenue Transit Station area will begin in Fiscal Year 2015.
- The Mobility Planning Section prepares and develops travel forecasts, mobility, corridor and parking studies, and plans and programs that identify multimodal transportation improvements. Mobility planning is integrated with land use and climate change planning to embrace sustainability goals through the preparation of active transportation plans, community plan mobility elements, and the planning and development of an efficient and effective multimodal transportation system for the City.

The Long-Range Planning Division's mission is:

*To engage San Diegans to envision, plan, implement, and maintain a sustainable and equitable city through the wise use of land, resources, and aesthetics ensuring a high quality of life for all generations*

## Goal and Objectives

The following goal and objectives represent the action plan for the Long-Range Planning Division:

***Goal: Create visionary plans that are achievable and support the success of neighborhoods***

The preparation and implementation of effective land use plans requires coordination and collaboration in order to guide development within a community and provide a foundation for fair and predictable land use decisions. Community plans are a means to maintain and improve the quality of life and respect the essential character of San Diego's communities. The Division will move toward accomplishing this goal by focusing on the following objectives:

- Update community plans and prepare focused amendments, specific plans, and rezones to reflect a community's vision of the future, implement the General Plan, reflect changes that have taken place since the community plan was last updated, and proactively anticipate the community's future needs
- Employ the collaborative use of multi-disciplinary teams to prepare community, specific, and other land use plans with an engaging process and according to a predictable process and schedule
- Present plans in a cohesive and comprehensive way
- Monitor and revise adopted plans to ensure continued relevance and effectiveness
- Proactively seek grant funds to update and implement plans

## Key Performance Indicators

Performance Measure	Actual FY2013	Actual FY2014	Target FY2015
1. Number of long-range plans brought to a City Council hearing	2 <sup>1</sup>	3 <sup>2</sup>	6 <sup>3</sup>
2. Maintain a beneficial leveraging ratio between new grant funds awarded to matching General Fund financial requirements	5:1	10:1 <sup>4</sup>	10:1 <sup>4</sup>

1. San Diego River Park Master Plan; Housing Element Update.
2. Barrio Logan Community Plan Update (CPU); Bicycle Master Plan Update; Otay Mesa CPU.
3. Ocean Beach CPU; Grantville TOD; Southeastern CPU; Encanto Neighborhoods Community Plan; Chollas Triangle TOD; General Plan focused amendments.
4. The Department received, or anticipates receiving, larger awards of grant funds without a City match requirement.

## Service Efforts and Accomplishments

### Long-Range Planning

San Diego's General Plan, adopted in 2008, is the blueprint for how the City of San Diego will grow and develop over the next 20 to 30 years. General Plan implementation occurs through a wide variety of programs and actions that involve many City departments. Planning staff also works with other agencies, including the San Diego Association of Governments (SANDAG), to help ensure that City and regional plans together represent a unified vision and implementation strategy. Staff proactively pursues and secures grant funding to further General Plan implementation and leverage General Fund dollars. City Council adoption of the Bicycle Master Plan in December 2013 was an important milestone in implementing the General Plan's multimodal mobility and sustainability goals. In Fiscal Year 2014, Long-Range Planning, under the leadership of the Mayor's Office, also assumed responsibility for the update to the City's Climate Action Plan.

The Long-Range Planning Division continues to make progress on community plan updates. The Barrio Logan Community Plan was adopted by the City Council in July 2013, but was overturned by voter referendum in June 2014. The Otay Mesa Community Plan Update (CPU) was adopted by the City Council on March 11, 2014, and the Ocean Beach CPU is anticipated to be adopted in the summer of 2014. The Grantville and Chollas Triangle focused community plan amendments (Transit-Oriented Development station area plans), the Southeastern CPU, and the proposed new Encanto Neighborhoods Community Plan are scheduled for Council adoption in Fiscal Year 2015. Discussion drafts of the Uptown, North Park, Golden Hill, Midway/Pacific Highway, and San Ysidro community plans are under review by the community planning groups, and significant progress has been made on the Old Town San Diego community plan update. In addition, work on the Pedestrian Master Plan, which includes citywide recommendations, as well as specific recommendations for pedestrian infrastructure projects in communities with high pedestrian propensity, is nearing completion.

The Division is currently administering 27 grants totaling over \$17.7 million dollars. In Fiscal Year 2014, the Division has recently completed the Morena Boulevard Station Area Phase I Planning Study, the National Avenue Master Plan, and the Euclid Gateway Plan, and expects to complete the City Heights Urban Greening Plan in Fiscal Year 2015. Approximately \$1.6 million in planning grants was awarded to the Division in Fiscal Year 2014 for the Palm Avenue Revitalization Plan, the Complete Boulevard Planning Study, and the Morena Boulevard Station Area Study Phase II and the Balboa Avenue Station Area Plan. Additionally, the Division received a Housing-Related Parks Grant for approximately \$4.4 million to design and construct skate parks in Linda Vista and City Heights. This

# Planning

funding program, identified in the General Plan Housing Element, provides grant funds for park infrastructure projects based on the production of affordable housing units in the City the previous year.

The Division provides staff support to San Diego's 41 City Council-recognized community planning groups and the Community Planners Committee by attending meetings, advising groups on operational issues, and conducting training sessions. Three training sessions were held in Fiscal Year 2014, and four are scheduled in Fiscal Year 2015. In addition to these efforts, the Long-Range Planning Division is processing a number of community plan amendments and large-scale discretionary development reviews in order to ensure conformance with adopted community plans and related policy documents.

## Division Description

### Environmental & Resource Analysis

The Environmental & Resource Analysis (E&RA) Division serves as the wheelhouse for all environmental policy in the City, including the California Environmental Quality Act (CEQA) authority, citywide CEQA policy, and environmental review of all community plan updates and other planning projects and plans, all CIP projects, and all other City-initiated projects, such as real estate transactions. The Division is responsible for implementation of General Plan policies related to Historic Preservation, the Multiple Species Conservation Program (MSCP), and Park Planning. The Division is also responsible for historic, MSCP, and park planning review of all projects.

- The CEQA & Environmental Policy Section will review all City projects and other actions under CEQA for potential environmental impacts, prepares environmental documents, directs the work of outside environmental consultants, provides CEQA training to community planning groups, other City departments and outside interested parties, updates the City's Significance Thresholds based on best practices and current case law, and oversees CEQA review by other City departments. Implementation of this new program is currently in progress.
- The Historic Resources Section reviews ministerial and discretionary projects for impacts to designated and potentially historic resources, conducts surveys of historic neighborhoods, takes forward individual and district historic designations, serves as staff to the Historical Resources Board and as liaison to the State Office of Historic Preservation, prepares the Historic Preservation element of community plan updates, inspects historic Mills Act properties for compliance with recorded agreements, and prepares new Mills Act agreements on designated properties.
- The Multiple Species Conservation Program (MSCP) Section reviews discretionary projects for impacts to wetlands and within the Multi-Habitat Planning Area (MHPA) preserve, prepares portions of the Conservation element of community plan updates, works with the Real Estate Assets Department to acquire new open space lands within the MHPA, is currently preparing a Vernal Pool Habitat Conservation Plan addressing seven sensitive wetland species, and coordinates with the federal and State wildlife agencies on the MSCP, sensitive species, and habitats.
- The Park Planning Section reviews discretionary projects for impacts to population-based parks, determines the need for additional park land consistent with General Plan standards, prepares General Development and Natural Resource Management plans for open space, regional parks and resource-based parkland; prepares the Recreation element of community plan updates, prepares updates and amendments to public facility financing plans as needed, and prepares project sheets creating new CIP park projects.

The Environmental & Resource Analysis Division's mission is:

*To implement adopted plans, policies, and regulations in a manner that protects the quality of the environment, expands open space and parklands, and manages historical resources for future generations*

## Goals and Objectives

The following goals and objectives represent the action plan for the Environmental & Resource Analysis Division:

### ***Goal 1: Improve the City's CEQA process for public and private projects***

The City Council's recently approved organization and function of the Planning Department included moving the environmental authority, policy, and review functions into the Department. All discretionary actions are subject to review under CEQA, including community plan updates and other planning projects and plans, CIP and other City-initiated projects, and private development projects. Over the last several years, City projects, including community plan updates, have not been given the staffing support necessary to move them through the review process in a timely manner, and regular updates to City policies, standards, thresholds, and guidelines have not kept up with new legislation and court cases. Improvement of the City's environmental review process to ensure best and most legally defensible practices are being used is a critical issue being undertaken by this division. This work effort will result in an improved environmental review process for public and private development. The Division will move toward accomplishing this goal by focusing on the following objectives:

- Coordinate delegated CEQA review by other departments
- Update the City's CEQA Significance Thresholds to address current best legal practices and reflect State-approved streamlined review process for transit priority areas
- Conduct regular CEQA training for City staff, community planning groups, and environmental consultants

### ***Goal 2: Plan for and manage the City's historical resources, Multiple Species Conservation Program, and Parks consistent with the General Plan***

Implementation of the Historic Preservation Element, Park and Recreation Element, and aspects of the Conservation Element of the General Plan is accomplished through a number of tasks that are the responsibility of this division. The Division will move toward accomplishing this goal by focusing on the following objectives:

- Inspect existing historic Mills Act properties for compliance with conditions of contracts
- Process historic designation nominations for both individual sites and districts
- Acquire additional MSCP preserve open space through grant funding and project exactions
- Complete the Vernal Pool Habitat Conservation Plan
- Complete the Mission Trails Regional Park Master Plan update
- Prepare new CIP projects for Fiscal Year 2016 and transfer to Public Works for development

## Key Performance Indicators

Performance Measure	Actual FY2013	Actual FY2014	Target FY2015
1. Number of historic Mills Act inspections completed	188	200	250
2. Number of new CIP park projects created and transferred to PWD/E&CP for construction	N/A <sup>1</sup>	12	12

1. This measure was not tracked in Fiscal Year 2013 because it was new for Fiscal Year 2014.

# Planning

## Service Efforts and Accomplishments

### Environmental & Resource Analysis

The Environmental & Resource Analysis Division has new programs in the Planning Department whose implementation is currently in progress.

The Historic Resources Section completed a number of significant tasks in Fiscal Year 2014, including 91 new Mills Act contracts, 43 new individual historic nominations, one historic district expansion with 99 buildings and 149 inspections of historic properties receiving property tax reductions under the City's Mills Act program. In addition, during Fiscal Year 2014, staff reviewed 2,616 projects for compliance with the historical resources regulations, began processing two new historic districts, continued work on several historic surveys in support of community plan updates, and completed the Annual Certified Local Government Report. The Otay Mesa and Ocean Beach historic contexts and surveys were taken to the HRB for recommendation to City Council related to those community plan updates. It is anticipated that, during Fiscal Year 2015, another 2,600 projects will be reviewed along with completion of new Mills Act agreements, additional Mills Act inspections, additional historic surveys and districts, and new historic nominations. Staff continues to add historic resources data to the online database (California Historic Resources Inventory Database or CHRID) in order to improve the public's access to this information.

The Multiple Species Conservation Program (MSCP) section continued work on a Habitat Conservation Plan (HCP) for endangered and threatened vernal pool species. During Fiscal Year 2014, staff conducted 137 development project reviews for compliance with the MSCP regulations and anticipates reviewing a similar number of projects in Fiscal Year 2015. Staff also began work on a new strategy for addressing impacts to burrowing owls and their habitat and completed the MSCP Annual Report. In Fiscal Year 2015, it is anticipated that the Draft HCP and Burrowing Owl strategy will be completed, as well as the Conservation Elements of several Community Plan updates. In accordance with the City's MSCP Implementing Agreement, 52,727 acres are required to be conserved within the City's Multi-Habitat Planning Area (MHPA). To date, approximately 94 percent of this acreage has been conserved or is obligated for future conservation.

Park Planning staff continues to initiate and monitor the acquisition of parkland in accordance with requests from community groups and discretionary permit conditions, and to review discretionary and ministerial development proposals for impacts to existing parks and open space. During Fiscal Year 2014, staff conducted 295 development project reviews resulting in several new parks and joint-use projects in accordance with General Plan standards. Park Planning staff prepared and submitted 14 new park projects for the Fiscal Year 2015 Capital Improvements Program budget. During Fiscal Year 2014, the San Diego River Park Master Plan was approved by City Council. Park Planning staff is preparing recreation elements for all community plan updates and the associated park and recreation sections of public facilities financing plans. Staff continues to manage aspects of the Torrey Pines City Park General Development Plan implementation and the Mission Trails Regional Park Master Plan Update.

## Program Description

### Facilities Financing

The Facilities Financing Program, in the Planning Department, administers the Facilities Benefit Assessment (FBA) and Development Impact Fee (DIF) programs for the City. For additional detail, refer to the Facilities Financing Program section.



## Department Summary

	FY2013 Actual	FY2014 Budget	FY2015 Adopted	FY2014–2015 Change
FTE Positions (Budgeted)	0.00	0.00	62.08	62.08
Personnel Expenditures	\$ -	\$ -	\$ 7,504,184	\$ 7,504,184
Non-Personnel Expenditures	-	-	1,821,433	1,821,433
<b>Total Department Expenditures</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 9,325,617</b>	<b>\$ 9,325,617</b>
<b>Total Department Revenue</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 3,831,968</b>	<b>\$ 3,831,968</b>

## General Fund

### Department Expenditures

	FY2013 Actual	FY2014 Budget	FY2015 Adopted	FY2014–2015 Change
Planning	\$ -	\$ -	\$ 9,325,617	\$ 9,325,617
<b>Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 9,325,617</b>	<b>\$ 9,325,617</b>

### Department Personnel

	FY2013 Budget	FY2014 Budget	FY2015 Adopted	FY2014–2015 Change
Planning	0.00	0.00	62.08	62.08
<b>Total</b>	<b>0.00</b>	<b>0.00</b>	<b>62.08</b>	<b>62.08</b>

### Significant Budget Adjustments

	FTE	Expenditures	Revenue
<b>City Planning Transfer</b> Transfer of the City Planning Division of the Development Services Department to the Planning Department.	44.75	\$ 7,103,774	\$ 2,971,769
<b>Civic &amp; Urban Initiatives Transfer</b> Transfer of the Civic & Urban Initiatives Department to the Planning Department.	6.00	925,146	-
<b>CEQA and Urban Design Transfer</b> Transfer of 7.00 Associate Planners from the Development Services Department to the Planning Department for California Environmental Quality Act (CEQA) and Urban Design.	7.00	709,163	-
<b>Management Reorganization</b> Addition of 1.00 Planning Director, 1.00 Assistant Planning Director, and 1.00 Deputy Planning Director, and the reduction of 1.00 Program Manager and 1.00 Program Coordinator for Civic & Urban Initiatives to implement the Improvement to Government Operations Plan as approved by the City Council.	1.00	504,155	-
<b>Addition of Community Plan Update Staff</b> Addition of 1.00 Associate Planner, 1.00 Assistant Traffic Engineer and non-personnel expenditures for community plan updates.	2.00	206,219	-
<b>Addition of Urban Forestry Program Manager</b> Addition of 1.00 Program Manager for implementation of a Citywide Urban Forestry Program.	1.00	185,850	-

# Planning

## Significant Budget Adjustments (Cont'd)

	FTE	Expenditures	Revenue
<b>Equipment/Support for Information Technology</b> Adjustment to expenditure allocations according to a zero-based annual review of information technology funding requirements and priority analyses.	0.00	171,298	-
<b>Non-Discretionary Adjustment</b> Adjustment to expenditure allocations that are determined outside of the department's direct control. These allocations are generally based on prior year expenditure trends and examples of these include utilities, insurance, and rent.	0.00	142,549	-
<b>Addition of Historic Resources Associate Planner</b> Addition of 1.00 Associate Planner and offsetting revenue for Historic Resources Planning.	1.00	102,234	102,449
<b>Non-Standard Hour Personnel Funding</b> Adjustment to expenditures according to a zero-based annual review of non-standard hour personnel funding requirements.	2.33	91,615	-
<b>Community Planning Group Support</b> Addition of 1.00 Clerical Assistant 2 and non-personnel expenditures for administrative support and enhanced support to community planning groups.	1.00	87,099	-
<b>Addition of Word Processing Operator</b> Addition of 1.00 Word Processing Operator and a partially offsetting reduction of non-personnel expenditures to support CEQA and Urban Design staff.	1.00	2,264	-
<b>Reduction of Deputy Director</b> Reduction of 1.00 Deputy Director to offset the addition of 1.00 Department Director in the Economic Development Department.	(1.00)	(205,205)	-
<b>Reduction of Civic &amp; Urban Initiatives</b> Reduction of 1.00 Program Manager, 3.00 Program Coordinators, and non personnel expenditures that support Civic & Urban Initiatives.	(4.00)	(700,544)	-
<b>Revised Revenue</b> Adjustment to reflect Fiscal Year 2015 revenue projections.	0.00	-	757,750
<b>Total</b>	<b>62.08</b>	<b>\$ 9,325,617</b>	<b>\$ 3,831,968</b>

## Expenditures by Category

	FY2013 Actual	FY2014 Budget	FY2015 Adopted	FY2014-2015 Change
<b>PERSONNEL</b>				
Personnel Cost	\$ -	\$ -	\$ 4,395,497	\$ 4,395,497
Fringe Benefits	-	-	3,108,687	3,108,687
<b>PERSONNEL SUBTOTAL</b>	-	-	<b>7,504,184</b>	<b>7,504,184</b>
<b>NON-PERSONNEL</b>				
Supplies	\$ -	\$ -	\$ 85,374	\$ 85,374
Contracts	-	-	1,402,379	1,402,379
Information Technology	-	-	148,557	148,557
Energy and Utilities	-	-	73,049	73,049
Other	-	-	24,770	24,770

# Planning

## Expenditures by Category (Cont'd)

	FY2013 Actual	FY2014 Budget	FY2015 Adopted	FY2014–2015 Change
Transfers Out	-	-	87,304	87,304
<b>NON-PERSONNEL SUBTOTAL</b>	-	-	1,821,433	1,821,433
<b>Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 9,325,617</b>	<b>\$ 9,325,617</b>

## Revenues by Category

	FY2013 Actual	FY2014 Budget	FY2015 Adopted	FY2014–2015 Change
Charges for Services	\$ -	\$ -	\$ 1,178,814	\$ 1,178,814
Licenses and Permits	-	-	2,652,154	2,652,154
Other Revenue	-	-	1,000	1,000
<b>Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 3,831,968</b>	<b>\$ 3,831,968</b>

## Personnel Expenditures

Job Number	Job Title / Wages	FY2013 Budget	FY2014 Budget	FY2015 Adopted	Salary Range	Total
<b>FTE, Salaries, and Wages</b>						
20000011	Account Clerk	0.00	0.00	1.00	\$31,491 - \$37,918	\$ 31,491
20000024	Administrative Aide 2	0.00	0.00	1.00	42,578 - 51,334	49,794
20000116	Assistant Engineer-Traffic	0.00	0.00	1.00	57,866 - 69,722	57,866
20001083	Assistant Planning Director	0.00	0.00	1.00	31,741 - 173,971	140,000
90001155	Assistant to the Planning Director - Hourly	0.00	0.00	0.35	46,966 - 172,744	38,449
20000167	Associate Engineer-Traffic	0.00	0.00	4.00	66,622 - 80,454	318,195
20000119	Associate Management Analyst	0.00	0.00	2.00	54,059 - 65,333	121,609
20000162	Associate Planner	0.00	0.00	14.00	56,722 - 68,536	826,663
20000539	Clerical Assistant 2	0.00	0.00	1.00	29,931 - 36,067	32,968
20000303	Community Development Specialist 4	0.00	0.00	2.00	66,768 - 80,891	161,782
20001168	Deputy Director	0.00	0.00	1.00	46,966 - 172,744	109,855
20001179	Deputy Planning Director	0.00	0.00	1.00	46,966 - 172,744	125,000
20000105	Development Project Manager 3	0.00	0.00	1.00	76,794 - 92,851	76,794
20000924	Executive Secretary	0.00	0.00	1.00	43,555 - 52,666	52,666
20000290	Information Systems Analyst 2	0.00	0.00	1.00	54,059 - 65,333	65,333
20000998	Information Systems Analyst 4	0.00	0.00	1.00	66,768 - 80,891	80,891
20000346	Legislative Recorder 1	0.00	0.00	1.00	41,558 - 50,232	44,951
90001073	Management Intern - Hourly	0.00	0.00	0.66	24,274 - 29,203	16,021
20000669	Park Designer	0.00	0.00	2.00	66,664 - 80,496	159,785
20000680	Payroll Specialist 2	0.00	0.00	1.00	34,611 - 41,787	41,787
20001132	Planning Director	0.00	0.00	1.00	59,155 - 224,099	175,000
90001145	Planning Intern - Hourly	0.00	0.00	1.32	24,274 - 29,203	32,042
20000743	Principal Engineering Aide	0.00	0.00	2.00	50,003 - 60,549	60,549
20001222	Program Manager	0.00	0.00	3.00	46,966 - 172,744	219,710
20000918	Senior Planner	0.00	0.00	13.75	65,354 - 79,019	1,062,871
20000926	Senior Traffic Engineer	0.00	0.00	1.00	76,794 - 92,851	92,851
20000970	Supervising Management Analyst	0.00	0.00	1.00	66,768 - 80,891	80,891
20000756	Word Processing Operator	0.00	0.00	1.00	31,491 - 37,918	31,491

# Planning

## Personnel Expenditures (Cont'd)

Job Number	Job Title / Wages	FY2013 Budget	FY2014 Budget	FY2015 Adopted	Salary Range	Total
	Bilingual - Regular					2,912
	Landscape Architect Lic					24,148
	Overtime Budgeted					11,000
	Reg Pay For Engineers					50,132
<b>FTE, Salaries, and Wages Subtotal</b>		<b>0.00</b>	<b>0.00</b>	<b>62.08</b>		<b>\$ 4,395,497</b>
		<b>FY2013 Actual</b>	<b>FY2014 Budget</b>	<b>FY2015 Adopted</b>		<b>FY2014-2015 Change</b>
<b>Fringe Benefits</b>						
	Employee Offset Savings	\$ -	\$ -	\$ 62,072		\$ 62,072
	Flexible Benefits	-	-	454,706		454,706
	Long-Term Disability	-	-	14,818		14,818
	Medicare	-	-	63,575		63,575
	Other Post-Employment Benefits	-	-	351,828		351,828
	Retiree Medical Trust	-	-	339		339
	Retirement 401 Plan	-	-	1,357		1,357
	Retirement ADC	-	-	1,878,319		1,878,319
	Retirement DROP	-	-	6,508		6,508
	Risk Management Administration	-	-	54,926		54,926
	Supplemental Pension Savings Plan	-	-	194,013		194,013
	Unemployment Insurance	-	-	8,489		8,489
	Workers' Compensation	-	-	17,737		17,737
<b>Fringe Benefits Subtotal</b>		<b>\$ -</b>	<b>\$ -</b>	<b>\$ 3,108,687</b>		<b>\$ 3,108,687</b>
<b>Total Personnel Expenditures</b>					<b>\$ 7,504,184</b>	

# Facilities Financing Program



## Program Description

The Facilities Financing Program, in the Planning Department, administers the Facilities Benefit Assessment (FBA) and Development Impact Fee (DIF) programs for the City of San Diego. A core function of this program is the preparation and updating of communities' Public Facilities Financing Plans (PFFPs) and implementing the Capital Improvement Program (CIP) budget for PFFP-programmed projects. Facilities Financing staff administers the City of San Diego Statewide Community Infrastructure Program (SCIP), the Regional Transportation Congestion Improvement Plan (RTCIP), and the Impact Fee Deferral Program (IFDP). They also monitor Development Agreements, Reimbursement Agreements, Special Park Funds, and a variety of other special purpose funds. The group also coordinates with Park Planning on a variety of park projects and administers the Mission Bay and Regional Park Improvement Funds.

## Goal and Objectives

The following goal and objectives represent the action plan for the Program:

### **Goal: Finance public facilities**

Providing adequate financing is critical to developing and maintaining public facilities (e.g., parks, libraries, fire stations, and streets) that will serve the City's current and future populations. The Program will move toward accomplishing this goal by focusing on the following objectives:

- Maintain an effective facilities financing program to ensure that the impact of new development is mitigated through appropriate fees
- Coordinate with other departments and programs in order to pursue a broad range of funding sources to finance public facilities and infrastructure
- Invest in public infrastructure that supports and leverages private investment in communities

## Key Performance Indicator

Performance Measure	Actual FY2013	Actual FY2014	Target FY2015
1. Number of Public Facilities Financing Plans updated/amended	6	11 <sup>1</sup>	10

1. Increase in target number of plans to update based on direction from the former mayoral administration to update all Public Facilities Financing Plans.

# Facilities Financing Program

## Service Efforts and Accomplishments

Facilities Financing administers the Facilities Benefit Assessment (FBA) and Development Impact Fee (DIF) programs for the City of San Diego. A core function of this program is the preparation and updating of communities' Public Facilities Financing Plans (PFFPs) and implementing the Capital Improvement Program (CIP) budget for PFFP-programmed projects. For Fiscal Year 2014, the following PFFPs have been approved: Barrio Logan-CP, Carmel Valley, Downtown, College Area, East Elliot, Mid-City, Mira Mesa, Otay Mesa-CP, Otay Nestor, Rancho Bernardo, and Rancho Peñasquitos. Financing Plan updates are, or will be, under way shortly for the following PFFPs with Council adoption anticipated during Fiscal Year 2015: Ocean Beach-CP, Black Mountain Ranch, Mira Mesa, Navajo/Grantville-CP, North University City, Pacific Highlands Ranch, South University City, Southeastern-CP, Torrey Highlands, and Uptown-CP. A "CP" designation has been included on all PFFPs, which are being updated in conjunction with a Community Plan Update. As other community plan updates are being completed, Facilities Financing staff will continue to coordinate with Long-Range Planning staff to concurrently prepare PFFP updates. Future community plan updates that will include PFFP updates include North Park, Golden Hill, San Ysidro, Old Town, and Midway/Pacific Highway.

Based on current economic conditions, approximately \$65.0-\$70.0 million in fees are anticipated to be collected in Fiscal Year 2015 to fund community facilities identified in the PFFPs. In Fiscal Year 2014, \$75.0 million in DIF, FBA, and other impact fees were collected for the year.

Facilities Financing staff also administers the City of San Diego Statewide Community Infrastructure Program (SCIP), the Regional Transportation Congestion Improvement Program (RTCIP), and the Impact Fee Deferral Program (IFDP). They also monitor Development Agreements, Reimbursement Agreements, Special Park Funds, and a variety of other special purpose funds. It also coordinates with Park Planning on a variety of park projects and administers the Mission Bay and Regional Park Improvement Funds.

# Facilities Financing Program

## Department Summary

	FY2013 Actual	FY2014 Budget	FY2015 Adopted	FY2014–2015 Change
FTE Positions (Budgeted)	0.00	0.00	16.35	16.35
Personnel Expenditures	\$ -	\$ -	\$ 1,888,206	\$ 1,888,206
Non-Personnel Expenditures	-	-	386,904	386,904
<b>Total Department Expenditures</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 2,275,110</b>	<b>\$ 2,275,110</b>
<b>Total Department Revenue</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 2,275,110</b>	<b>\$ 2,275,110</b>

## Facilities Financing Fund

### Department Expenditures

	FY2013 Actual	FY2014 Budget	FY2015 Adopted	FY2014–2015 Change
Facilities Financing Program	\$ -	\$ -	\$ 2,275,110	\$ 2,275,110
<b>Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 2,275,110</b>	<b>\$ 2,275,110</b>

### Department Personnel

	FY2013 Budget	FY2014 Budget	FY2015 Adopted	FY2014–2015 Change
Facilities Financing Program	0.00	0.00	16.35	16.35
<b>Total</b>	<b>0.00</b>	<b>0.00</b>	<b>16.35</b>	<b>16.35</b>

### Significant Budget Adjustments

	FTE	Expenditures	Revenue
<b>Facilities Financing Program Transfer</b> Transfer of the Facilities Financing Program from the Development Services Department to the Planning Department.	15.00	\$ 1,748,445	\$ 2,110,074
<b>Non-Discretionary Adjustment</b> Adjustment to expenditure allocations that are determined outside of the department's direct control. These allocations are generally based on prior year expenditure trends and examples of these include utilities, insurance, and rent.	0.00	246,868	-
<b>Addition of Senior Civil Engineer</b> Addition of 1.00 Senior Civil Engineer for reimbursement agreements and cost estimates for Public Facilities Financing Plans.	1.00	177,989	178,336
<b>Equipment/Support for Information Technology</b> Adjustment to expenditure allocations according to a zero-based annual review of information technology funding requirements and priority analyses.	0.00	71,836	-
<b>Non-Standard Hour Personnel Funding</b> Adjustment to expenditures according to a zero-based annual review of non-standard hour personnel funding requirements.	0.35	29,972	-
<b>Revised Revenue</b> Adjustment to reflect Fiscal Year 2015 revenue projections.	0.00	-	(13,300)
<b>Total</b>	<b>16.35</b>	<b>\$ 2,275,110</b>	<b>\$ 2,275,110</b>

# Facilities Financing Program

## Expenditures by Category

	FY2013 Actual	FY2014 Budget	FY2015 Adopted	FY2014-2015 Change
<b>PERSONNEL</b>				
Personnel Cost	\$ -	\$ -	\$ 1,135,394	\$ 1,135,394
Fringe Benefits	-	-	752,812	752,812
<b>PERSONNEL SUBTOTAL</b>	-	-	<b>1,888,206</b>	<b>1,888,206</b>
<b>NON-PERSONNEL</b>				
Supplies	\$ -	\$ -	\$ 12,011	\$ 12,011
Contracts	-	-	256,219	256,219
Information Technology	-	-	63,610	63,610
Energy and Utilities	-	-	1,190	1,190
Other	-	-	1,294	1,294
Transfers Out	-	-	52,430	52,430
Capital Expenditures	-	-	150	150
<b>NON-PERSONNEL SUBTOTAL</b>	-	-	<b>386,904</b>	<b>386,904</b>
<b>Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 2,275,110</b>	<b>\$ 2,275,110</b>

## Revenues by Category

	FY2013 Actual	FY2014 Budget	FY2015 Adopted	FY2014-2015 Change
Charges for Services	\$ -	\$ -	\$ 2,255,010	\$ 2,255,010
Licenses and Permits	-	-	18,000	18,000
Rev from Money and Prop	-	-	2,100	2,100
<b>Total</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 2,275,110</b>	<b>\$ 2,275,110</b>

## Personnel Expenditures

Job Number	Job Title / Wages	FY2013 Budget	FY2014 Budget	FY2015 Adopted	Salary Range	Total
<b>FTE, Salaries, and Wages</b>						
2000024	Administrative Aide 2	0.00	0.00	1.00	\$42,578 - \$51,334	\$ 44,623
20000119	Associate Management Analyst	0.00	0.00	2.00	54,059 - 65,333	130,666
20000743	Principal Engineering Aide	0.00	0.00	2.00	50,003 - 60,549	120,190
20001222	Program Manager	0.00	0.00	1.00	46,966 - 172,744	109,855
20000885	Senior Civil Engineer	0.00	0.00	1.00	76,794 - 92,851	92,851
20000015	Senior Management Analyst	0.00	0.00	6.00	59,363 - 71,760	416,011
20000970	Supervising Management Analyst	0.00	0.00	2.00	66,768 - 80,891	161,782
90000970	Supervising Management Analyst - Hourly	0.00	0.00	0.35	66,768 - 80,891	28,312
20000756	Word Processing Operator	0.00	0.00	1.00	31,491 - 37,918	-
	Bilingual - Regular					1,456
	Overtime Budgeted					15,720
	Reg Pay For Engineers					13,928
<b>FTE, Salaries, and Wages Subtotal</b>		<b>0.00</b>	<b>0.00</b>	<b>16.35</b>		<b>\$ 1,135,394</b>

	FY2013 Actual	FY2014 Budget	FY2015 Adopted	FY2014-2015 Change
<b>Fringe Benefits</b>				
Employee Offset Savings	\$ -	\$ -	\$ 12,637	\$ 12,637
Flexible Benefits	-	-	119,895	119,895
Long-Term Disability	-	-	3,798	3,798



# Facilities Financing Program

	FY2013 Actual	FY2014 Budget	FY2015 Adopted	FY2014–2015 Change
Medicare	-	-	13,158	13,158
Other Post-Employment Benefits	-	-	90,990	90,990
Retirement ADC	-	-	415,201	415,201
Retirement DROP	-	-	6,503	6,503
Risk Management Administration	-	-	14,205	14,205
Supplemental Pension Savings Plan	-	-	58,954	58,954
Unemployment Insurance	-	-	2,173	2,173
Workers' Compensation	-	-	15,298	15,298
<b>Fringe Benefits Subtotal</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 752,812</b>	<b>\$ 752,812</b>
<b>Total Personnel Expenditures</b>			<b>\$ 1,888,206</b>	

# Facilities Financing Program

## Revenue and Expense Statement (Non-General Fund)

Facilities Financing Fund <sup>1</sup>	FY2013 Actual	FY2014* Budget	FY2015 Adopted
<b>BEGINNING BALANCE AND RESERVES</b>			
Balance from Prior Year	\$ 253,647	\$ (5,179)	\$ 0
<b>TOTAL BALANCE AND RESERVES</b>	<b>\$ 253,647</b>	<b>\$ (5,179)</b>	<b>\$ -</b>
<b>REVENUE</b>			
Licenses & Permits	\$ 20,500	\$ 18,000	\$ 18,000
Interest Earnings	545	2,100	2,100
Charges for Current Services	1,684,204	2,089,974	2,255,010
<b>TOTAL REVENUE</b>	<b>\$ 1,705,249</b>	<b>\$ 2,110,074</b>	<b>\$ 2,275,110</b>
<b>TOTAL BALANCE, RESERVES, AND REVENUE</b>	<b>\$ 1,958,896</b>	<b>\$ 2,104,895</b>	<b>\$ 2,275,110</b>
<b>OPERATING EXPENSE</b>			
Personnel	\$ 984,327	\$ 1,028,411	\$ 1,135,394
Fringe	589,150	682,618	752,812
Supplies	4,932	12,011	12,011
Contracts	261,501	286,590	256,219
Information Technology	63,467	69,134	63,610
Energy & Utilities	-	1,756	1,190
Other/Transfers Out	55,257	29,404	53,724
Capital Exp-Equipment	-	150	150
<b>TOTAL OPERATING EXPENSE</b>	<b>\$ 1,958,633</b>	<b>\$ 2,110,074</b>	<b>\$ 2,275,110</b>
<b>TOTAL EXPENSE</b>	<b>\$ 1,958,633</b>	<b>\$ 2,110,074</b>	<b>\$ 2,275,110</b>
<b>BALANCE</b>	<b>\$ 263</b>	<b>\$ (5,179)</b>	<b>\$ -</b>
<b>TOTAL BALANCE, RESERVES, AND EXPENSE</b>	<b>\$ 1,958,896</b>	<b>\$ 2,104,895</b>	<b>\$ 2,275,110</b>

\* At the time of publication, audited financial statements for Fiscal Year 2014 were not available. Therefore, the Fiscal Year 2014 column reflects final budget amounts from the Fiscal Year 2014 Adopted Budget. As such, current fiscal year balances and reserves are estimates of carryover from the previous fiscal year.

<sup>1</sup>The Facilities Financing Fund was budgeted in the Development Services Department in Fiscal Years 2013 and 2014.