



America's Finest City

THE CITY OF SAN DIEGO



# **Assessment Engineer's Report**

## **BAY TERRACES – HONEY DRIVE MAINTENANCE ASSESSMENT DISTRICT**

**Annual Update for Fiscal Year 2010**

**under the provisions of the**

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

**and**

**Landscaping & Lighting Act of 1972  
of the California Streets & Highways Code**

**Prepared For**

**City of San Diego, California**

**Prepared By**

**AECOM**

7807 Convoy Court, Suite 200  
San Diego, CA 92111  
(858) 268-8080

**May 2009**

**AECOM**

# **CITY OF SAN DIEGO**

## **Mayor**

Jerry Sanders

## **City Council Members**

Sherrí Lightner  
District 1

Carl DeMaio  
District 5

Kevin Faulconer  
District 2 (Council President Pro Tem)

Donna Frye  
District 6

Todd Gloria  
District 3

Marti Emerald  
District 7

Anthony Young  
District 4

Ben Hueso  
District 8 (Council President)

## **City Attorney**

Jan Goldsmith

## **Chief Operating Officer**

Jay Goldstone

## **City Clerk**

Elizabeth Maland

## **Independent Budget Analyst**

Andrea Tevlin

## **City Engineer**

Afshin Oskoui

## **Assessment Engineer**

AECOM USA, Inc.

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## EXHIBITS

Exhibit A: District Boundary

Exhibit B: Estimated Annual Expenses, Revenues & Reserves

Exhibit C: Assessment Roll

# Assessment Engineer's Report Bay Terraces – Honey Drive Maintenance Assessment District

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## Preamble

Pursuant to the provisions of the “San Diego Maintenance Assessment District Ordinance” (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the “Landscaping and Lighting Act of 1972” (being Part 2 of Division 15 of the California Streets and Highways Code), 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 “Assessment Law”), in connection with the proceedings for the BAY TERRACES – HONEY DRIVE MAINTENANCE ASSESSMENT DISTRICT (hereinafter referred to as “District”), AECOM USA, INC., as Assessment Engineer to the City of San Diego for these proceedings, submits herewith this report for the District as required by California Streets and Highways Code Section 22565.

FINAL APPROVAL, BY RESOLUTION NO. \_\_\_\_\_ ,  
ADOPTED BY THE CITY COUNCIL OF THE CITY OF SAN  
DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, ON THE  
\_\_\_\_\_ DAY OF \_\_\_\_\_, 2009.

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

## Executive Summary

**Project:** Bay Terraces – Honey Drive  
 Maintenance Assessment District

**Apportionment Methods:** Equivalent Dwelling Unit (EDU)

	<b>FY 2009</b>	<b>FY 2010 <sup>(1)</sup></b>	<b>Maximum Authorized</b>
<b>Total Parcels Assessed:</b>	50	50	--
<b>Total Estimated Assessment:</b>	\$10,142	\$10,142	--
<b>Total Number of EDUs:</b>	96.03	96.03	--
<b>Unit Assessment Rate:</b>	\$105.62	\$105.62	\$105.62

<sup>(1)</sup> FY 2010 is the City's Fiscal Year 2010, which begins July 1, 2009 and ends June 30, 2010. Total Parcels Assessed, Total Estimated Assessment, and Total Number of EDUs may vary from prior fiscal year values due to parcel changes and/or land use re-classifications.

**District History:** The District was established in December 1982.

**Annual Cost-Indexing:** Indexing of assessments is not permitted under the current apportionment methodology.

**Bonds:** No bonds will be issued in connection with this District.

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## Background

The Bay Terraces – Honey Drive Maintenance Assessment District (District), formerly known as “Bay Terraces Zone 5,” was established in December 1982. The general purpose of the assessments is to provide for the maintenance of dedicated open space areas.

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## District Proceedings for Fiscal Year 2010

This District is authorized and administered under the provisions of the “San Diego Maintenance Assessment District Procedural Ordinance of 1986” (being Division 2, Article 5, Chapter VI beginning at Section 65.0201 of the San Diego Municipal Code), provisions of the “Landscaping and Lighting Act of 1972” (being Part 2 of Division 15 of the California Streets and Highways Code), applicable provisions of “Proposition 218” (being Article XIII D 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 “Assessment Law”).

The purpose of the proposed proceedings and this Assessment Engineer’s Report is to update the District budget and assessments for Fiscal Year 2010. The Fiscal Year 2010 assessments proposed within this Assessment Engineer’s Report are equal to or less than the maximum authorized assessment. Therefore, the vote requirements of Section 4 of Article XIII D do not apply to these proceedings.

A public hearing will be scheduled where public testimony will be heard by the Council, and the Council may, at its discretion, adopt a resolution ordering the levying of the proposed assessments.

## Bond Declaration

No bonds will be issued in connection with this District.

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## District Boundary

The District is located just south of Paradise Valley Road in the South Bay Terraces community of the City. The Boundary Map & Assessment Diagram for the District is on file in the Maintenance Assessment Districts Section of the Park and Recreation Department of the City of San Diego and by reference is made a part of this report.

The Boundary Map & Assessment Diagram is available for public inspection during normal business hours. The District boundary is depicted in Exhibit A.

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## Project Description

The project to be funded by the proposed assessments is the maintenance of an open space lot located along Honey Drive. Maps of the improvements maintained by the District are on file at Maps and Records in the Development Services Department and are incorporated herein. The improvements and services provided by the District will be maintained in accordance with specifications and contracts on file with the Park and Recreation Department. These documents are available for public inspection during normal business hours.

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## Separation of General and Special Benefits

Consistent with City policy for the public at large, the City will provide the District with annual contributions from the Environmental Growth Fund for open space maintenance (\$45.13 per acre). These cost allocations, reviewed and adjusted annually by the City, are considered to be “general benefits” administered by the District. All other maintenance, operations, and administration costs associated with the District, which exceed the City’s contribution to the public at large, are accordingly considered to be “special benefits” funded by the District.

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## Cost Estimate

### Estimated Costs

Estimated Fiscal Year 2010 annual expenses, revenues, reserves, and assessments (provided by the City) for the District are included as Exhibit B hereto.

### Annual Cost-Indexing

With the passage of Proposition 218, any proposed increase in assessments must be placed for approval before the property owners by a mail ballot and a public hearing process, similar to these proceedings. A majority of ballots received must be affirmative for the City Council to confirm and levy the increased assessments. The current maximum

authorized assessment established in 1982 is not authorized to be indexed (increased or decreased) without a vote of the affected property owners.

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## Method of Apportionment

### Estimated Benefit of the Improvements

Dedication of open space is consistent with the goals contained in the City's General Plan. Open space provides benefit through preserving natural resources, controlling urban form, providing for outdoor recreation, providing for the public health and safety, and serving as drainage corridors and view corridors. Open space also produces lower development density, which benefits the community's residents by not further increasing traffic congestion, noise levels, and storm water runoff pollutants. These open space assets, generally dedicated to the public during the development process, require ongoing management and maintenance to maintain their functionality, aesthetics, and continued contribution to the quality of life in the community. All parcels within the District benefit from these enhanced open space areas being maintained by the District.

The maintenance for these enhanced assets, since installation, has been funded through the District. The City's General Plan also supports the establishment of community landscape improvement and maintenance districts, such as this District, to serve these maintenance needs.

### Apportionment Methodology

The total cost for maintenance of District improvements will be assessed to the various parcels within the District in proportion to the estimated Equivalent Dwelling Units (EDUs) assigned to a parcel in relationship to the total EDUs of all the parcels in the District.

EDUs for each parcel have been determined based on a Density Factor applicable to the subject land use as shown in the following equation:

$$\text{EDUs} = (\text{Acres or Units}) \times \text{Density Factor}$$

Table 1 summarizes the Density Factors for land uses within the District.

**TABLE 1: Density Factors**

<b>Land Use/Zoning</b>	<b>Code</b>	<b>Density Factor</b>
Residential – Single Family (developed)	DSFD	1.0 per dwelling unit
Retail & Commercial (developed)	DRET	6.49 per acre

The EDUs calculated for each property in the District 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 costs of the improvements provided by the District is included as Exhibit B to this report.

The assessment methodology utilized is as described in the text of this report. Based on this methodology, the Fiscal Year 2010 District assessment for each parcel was calculated and is shown in the Assessment Roll (Exhibit C).

Each lot or parcel of land within the District has been identified by unique County Assessor's Parcel Number on the Assessment Roll and the Boundary Map and Assessment Diagram referenced herein. The net assessment for each parcel for Fiscal Year 2010 can be found on the Assessment Roll.

This report has been prepared and respectfully submitted by:

AECOM USA, INC.

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Eugene F. Shank, PE

C 52792

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Carolyn R. Crull

I, \_\_\_\_\_, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the Assessment as shown on the Assessment Roll, together with the Assessment Diagram, both of which are incorporated into this report, were filed in my office on the \_\_\_\_ day of \_\_\_\_\_, 2009.

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

I, \_\_\_\_\_, as CITY CLERK of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the Assessment Diagram incorporated into this report, was approved and confirmed by the CITY COUNCIL of said City on the \_\_\_\_ day of \_\_\_\_\_, 2009.

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

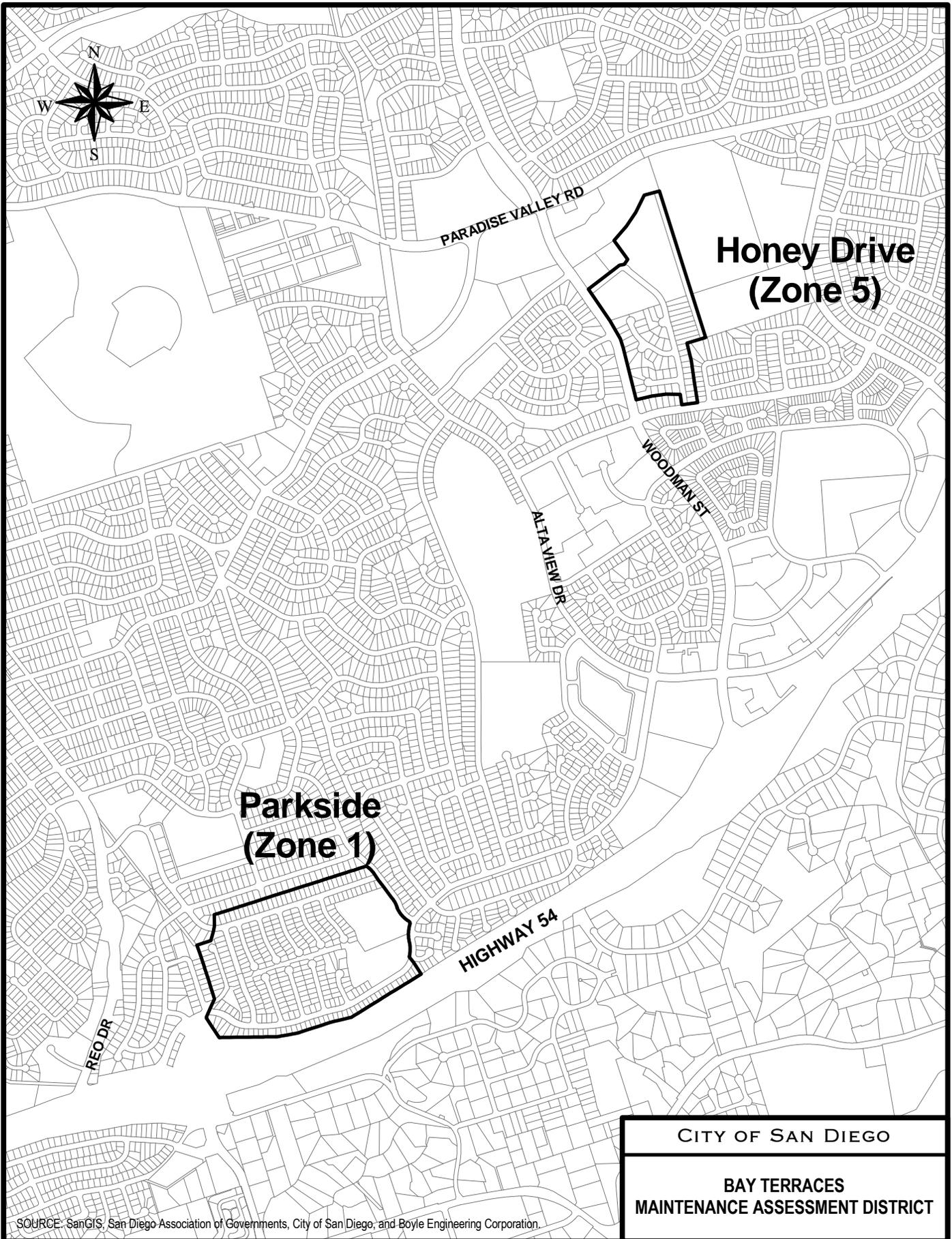
I, \_\_\_\_\_, as CITY ENGINEER of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the Assessment Diagram was recorded in my office on the \_\_\_\_ day of \_\_\_\_\_, 2009.

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Afshin Oskoui, CITY ENGINEER  
CITY OF SAN DIEGO  
STATE OF CALIFORNIA

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# **EXHIBIT A**



**Honey Drive  
(Zone 5)**

**Parkside  
(Zone 1)**

CITY OF SAN DIEGO  
BAY TERRACES  
MAINTENANCE ASSESSMENT DISTRICT

SOURCE: SanGIS, San Diego Association of Governments, City of San Diego, and Boyle Engineering Corporation.

# **EXHIBIT B**

# EXHIBIT B - Estimated Annual Expenses, Revenues & Reserves

Bay Terraces - Honey Drive - Fund No. 70272  
Formerly: Bay Terraces Zone 5 - Fund No. 70222/Org 2050

	FY 2008 BUDGET	FY 2009 BUDGET	FY 2010 BUDGET
<b>BALANCE FROM PRIOR YEAR</b>	\$ 19,667	\$ 18,938	\$ 17,609
<b>REVENUE</b>			
Assessments	\$ 10,142	\$ 10,142	\$ 10,142
Interest	\$ 300	\$ 450	\$ 500
Environmental Growth Fund	\$ 80	\$ 80	\$ 90
Gas Tax Fund	\$ -	\$ -	\$ -
General Fund	\$ -	\$ -	\$ -
Miscellaneous	\$ -	\$ -	\$ -
<b>TOTAL REVENUE</b>	<b>\$ 10,522</b>	<b>\$ 10,672</b>	<b>\$ 10,732</b>
<b>TOTAL BALANCE AND REVENUE</b>	<b>\$ 30,189</b>	<b>\$ 29,610</b>	<b>\$ 28,341</b>
<b>EXPENSE</b>			
<b>OPERATING EXPENSE</b>			
Personnel	\$ 1,824	\$ 1,869	\$ 1,819
Contractual	\$ 7,907	\$ 7,900	\$ 5,978
Incidental	\$ 1,027	\$ 1,045	\$ 11,203
<b>TOTAL OPERATING EXPENSE</b>	<b>\$ 10,758</b>	<b>\$ 10,814</b>	<b>\$ 19,000</b>
<b>RESERVE</b>			
Contingency Reserve	\$ 19,431	\$ 18,796	\$ 9,341
<b>TOTAL RESERVE</b>	<b>\$ 19,431</b>	<b>\$ 18,796</b>	<b>\$ 9,341</b>
<b>BALANCE</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>
<b>TOTAL EXPENSE, RESERVE AND BALANCE</b>	<b>\$ 30,189</b>	<b>\$ 29,610</b>	<b>\$ 28,341</b>

# **EXHIBIT C**

Due to the size of the Assessment Roll (Exhibit C), only limited copies are available. Please contact the City of San Diego, Park & Recreation Department, Open Space Division, Maintenance Assessment Districts Program at (619) 685-1350 to review the Assessment Roll.