



America's Finest City

THE CITY OF SAN DIEGO



# **Assessment Engineer's Report**

## **KINGS ROW 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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# Assessment Engineer's Report

## Kings Row

## 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 KINGS ROW 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:** Kings Row  
 Maintenance Assessment District

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

	<b>FY 2009</b>	<b>FY 2010 <sup>(1)</sup></b>	<b>Maximum Authorized</b>
<b>Total Parcels Assessed:</b>	66	66	--
<b>Total Estimated Assessment:</b>	\$5,984	\$7,960	--
<i>Zone 1</i>	\$5,186	\$5,186	--
<i>Zone 2</i>	\$799	\$2,774	--
<b>Total Number of EBUs:</b>	66.00	66.00	--
<i>Zone 1</i>	43.00	43.00	--
<i>Zone 2</i>	23.00	23.00	--
<b>Assessment per EBU:</b>			
<i>Zone 1</i>	\$120.60	\$120.60	\$120.60
<i>Zone 2</i>	\$34.71	\$120.60	\$465.14 <sup>(2)</sup>

<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 EBUs may vary from prior fiscal year values due to parcel changes and/or land use re-classifications.

<sup>(2)</sup> Maximum authorized annual amount for Zone #2 subject to cost-indexing provisions as set forth in this Assessment Engineer's Report. Prior fiscal year's maximum authorized annual assessment increased by cost-indexing factor of 3.16%.

**District History:** The District was established in Fiscal Year 1994. Zone #2 was annexed into the District as part of the Fiscal Year 2001 proceedings.

**Annual Cost-Indexing:** The maximum authorized assessment rate has been increased in Zone #2 based on the approved annual cost-indexing provisions.

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

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## Background

The Kings Row Maintenance Assessment District (District) was originally established in March 1994 to provide for maintenance of landscaping along a noise abatement wall fronting Euclid Avenue. New areas may be added to the District by annexation proceedings.

In 2000, Carter Reese & Associates petitioned the City of San Diego (City) for annexation of the Village at Euclid development into the District (as Zone #2). Zone #2 was successfully annexed into the District as part of the Fiscal Year 2001 proceedings. The annexation of Zone #2 provides for additional maintenance of landscaping along Euclid Avenue and Ocean View Boulevard. The approximate location of District improvements is shown in Exhibit A.

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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 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”). This report has been prepared in compliance with 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 XIID 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 Boundary Map and Assessment Diagram for the Kings Row Maintenance Assessment District are 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. A reduced copy of the Boundary Map and Assessment Diagram for the District are included as Exhibit A.

The Boundary Map and Assessment Diagram detail the District boundary, zone boundaries, and approximate location of improvements. As shown in Exhibit A, the District has been divided into two zones for benefit apportionment purposes.

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## Project Description

The project to be funded by the proposed assessments is the maintenance of landscaping along a noise abatement wall fronting Euclid Avenue within Zone #1. Zone #2 includes provision for additional maintenance of landscaping along Euclid Avenue and Ocean View Boulevard. The approximate location of District improvements is shown in Exhibit A.

Maintenance activities include, but are not limited to, turf mowing, edging and aeration, irrigation, revegetation and replacement of damaged plant material, tree and bush trimming, fertilizing, weeding, ongoing inspection and repairs.

The engineering drawings for the improvements to be maintained by the District are on file at Map and Records in the Development Services Department. 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

The City makes no contribution to the District. All maintenance, operation, and administrative costs that are funded by the District are considered to be “special benefits.” The City does not provide similar services to the public at large as a “general benefit.”

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## Cost Estimate

### Estimated Costs

Estimated Fiscal Year 2010 annual expenses, revenues, reserves, and assessments (provided by the City) 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. For small assessment districts or districts with relatively low dollar assessments, the cost of an engineer’s report, balloting, and the public hearing process can potentially exceed the total cost of the increase. These incidental costs of the proceedings can be added to the assessments, resulting in even higher assessments.

Indexing assessments annually to the San Diego Consumer Price Index for Urban Consumers (SDCPI-U), as approved by the District property owners in Fiscal Year 2001 within Zone #2, allows for minor increases for normal maintenance and operating cost escalation without incurring the costs of the Proposition 218 ballot proceedings. Any significant change in the assessment initiated by an increase in service provided or other significant changes to the District would still require the Proposition 218 proceedings and property owner approval.

The maximum authorized assessment established in the Zone #2 annexation proceedings are authorized to be indexed (increased) annually by the factor published in the SDCPI-U. The maximum authorized assessment rates contained within this Assessment

Engineer's Report have been indexed in accordance with these cost-indexing provisions.

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## Method of Apportionment

### Estimated Benefit of the Improvements

The Transportation Element of the City's General Plan and the general policy recommendations found in the local Community Plan establish several goals for the community's transportation system and urban design features. The improvements being maintained by this District are consistent with the plans' goals for safety and pleasing aesthetics.

### Apportionment Methodology

The total maintenance assessment for a given parcel is equal to the parcel's total equivalent benefit units (EBUs) multiplied by the unit assessment rate, as shown in the following equation:

$\text{Total Assessment} = \text{Total EBUs} \times \text{Unit Cost Per EBU}$
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### Equivalent Benefit Unit (EBU)

Due to the homogeneous nature of the land use within the District (i.e., entirely single family residential parcels) and relative uniformity of benefit to the respective parcels within each zone, each parcel within a given zone will be assessed equally (i.e., each parcel will be assigned 1 EBU). In other words, the total cost of maintaining improvements within a given zone will be equally assessed to all properties within the zone.

### Unit Assessment Rates

For each zone, the unit assessment rate for maintenance (unit cost per EBU) is equal to the total maintenance cost divided by the total EBUs:

$$\text{Unit Cost Per EBU} = \text{Total Maintenance Cost} / \text{Total EBUs}$$

As described above, the total assessment assigned to each parcel has been calculated based on the preceding factors. Based on the above methodology, EBUs, unit assessment rates, and total assessment calculated for each parcel 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 EBUs and Fiscal Year 2010 District assessment for each parcel were calculated and are 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

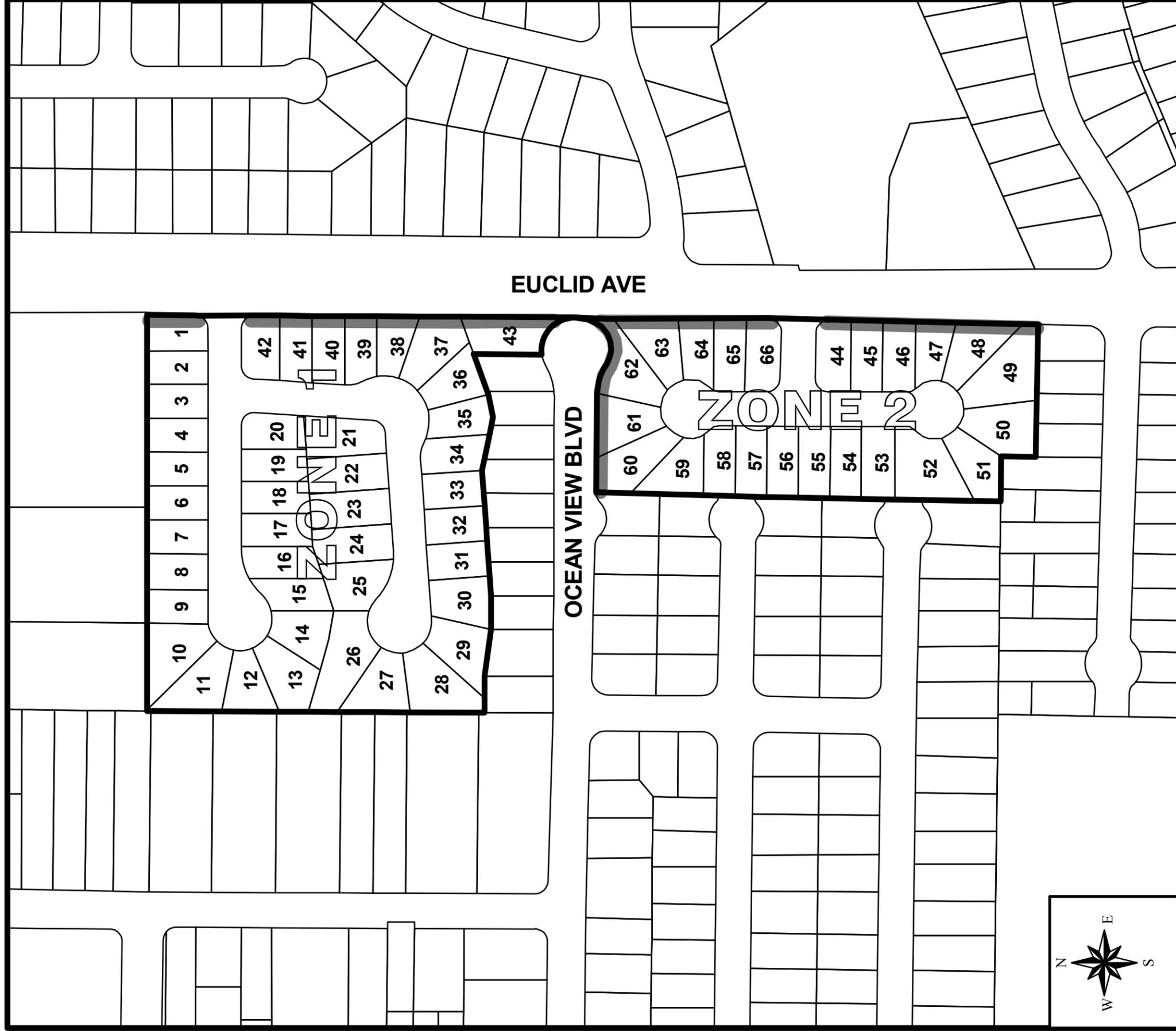
I, \_\_\_\_\_, as CITY ENGINEER of the CITY OF SAN DIEGO, COUNTY OF SAN DIEGO, CALIFORNIA, do hereby certify that the foregoing Assessment, together with the Assessment Diagram was recorded in my office on the \_\_\_\_ day of \_\_\_\_\_, 2009.

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

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# **EXHIBIT A**



## BOUNDARY MAP & ASSESSMENT DIAGRAM

FILED IN THE OFFICE OF THE CITY CLERK OF THE CITY OF SAN DIEGO, STATE OF CALIFORNIA, THIS \_\_\_\_ DAY OF \_\_\_\_\_, 2000.

PREPARED BY:  
**BOYLE ENGINEERING CORPORATION**  
 7807 Conroy Court, Suite 200, San Diego, California 92111 (619) 268-8080

I HEREBY CERTIFY THAT THE WITHIN MAP SHOWING PROPOSED BOUNDARIES OF THE KINGS ROW MAINTENANCE ASSESSMENT DISTRICT, CITY OF SAN DIEGO, STATE OF CALIFORNIA, WAS APPROVED BY THE CITY COUNCIL AT A REGULAR MEETING THEREOF, HELD ON THE \_\_\_\_ DAY OF \_\_\_\_\_, 2000, BY ITS RESOLUTION NO. \_\_\_\_\_.

CHARLES G. ABDELNOUR, CITY CLERK  
 CITY OF SAN DIEGO  
 STATE OF CALIFORNIA

AN ASSESSMENT WAS LEVIED BY THE CITY COUNCIL OF THE CITY OF SAN DIEGO ON THE LOTS, PIECES, AND PARCELS OF LAND SHOWN ON THIS ASSESSMENT DIAGRAM. SAID ASSESSMENT WAS LEVIED ON THE \_\_\_\_ DAY OF \_\_\_\_\_, 2000. SAID ASSESSMENT DIAGRAM AND THE ASSESSMENT ROLL WERE RECORDED IN THE OFFICE OF THE SUPERINTENDENT OF STREETS OF THE CITY OF SAN DIEGO, STATE OF CALIFORNIA ON THE \_\_\_\_ DAY OF \_\_\_\_\_, 2000. REFERENCE IS MADE TO THE ASSESSMENT ROLL RECORDED IN THE OFFICE OF THE SUPERINTENDENT OF STREETS FOR THE EXACT AMOUNT OF EACH ASSESSMENT LEVIED AGAINST EACH PARCEL OF LAND SHOWN ON THIS ASSESSMENT DIAGRAM.

NOTE:  
 FOR A DETAILED DESCRIPTION OF THE LINES AND DIMENSIONS OF LOTS OR PARCELS SHOWN ON THIS MAP, REFER TO THE COUNTY ASSESSOR'S MAPS WHICH SHALL GOVERN WITH RESPECT TO ALL DETAILS CONCERNING THE LINES AND DIMENSIONS OF SUCH LOTS OR PARCELS.

**LEGEND:**

- District Boundary
- District Improvements
- Parcel Line
- Diagram Number



CITY OF  
 SAN DIEGO

**KINGS ROW**  
 MAINTENANCE ASSESSMENT DISTRICT

W.O.

DATE: MAY 2000

REVS:

# **EXHIBIT B**

# EXHIBIT B - Estimated Annual Expenses, Revenues & Reserves

Kings Row - Fund 70250

	FY 2008 BUDGET	FY 2009 BUDGET	FY 2010 BUDGET
<b>BALANCE FROM PRIOR YEAR</b>	\$ 8,297	\$ 9,114	\$ 5,725
<b>REVENUE</b>			
Assessments	\$ 5,984	\$ 5,984	\$ 7,960
Interest	\$ 175	\$ 260	\$ 60
Environmental Growth Fund	\$ -	\$ -	\$ -
Gas Tax Fund	\$ -	\$ -	\$ -
General Fund	\$ -	\$ -	\$ -
Miscellaneous	\$ -	\$ -	\$ -
<b>TOTAL REVENUE</b>	<b>\$ 6,159</b>	<b>\$ 6,244</b>	<b>\$ 8,020</b>
<b>TOTAL BALANCE AND REVENUE</b>	<b>\$ 14,456</b>	<b>\$ 15,358</b>	<b>\$ 13,745</b>
<b>EXPENSE</b>			
<b>OPERATING EXPENSE</b>			
Personnel	\$ 2,737	\$ 2,805	\$ 2,730
Contractual	\$ 1,324	\$ 1,400	\$ 5,817
Incidental	\$ 1,061	\$ 1,116	\$ 1,183
Utilities	\$ 1,349	\$ 1,520	\$ 2,232
<b>TOTAL OPERATING EXPENSE</b>	<b>\$ 6,471</b>	<b>\$ 6,841</b>	<b>\$ 11,962</b>
<b>RESERVE</b>			
Contingency Reserve	\$ 7,985	\$ 8,517	\$ 1,783
<b>TOTAL RESERVE</b>	<b>\$ 7,985</b>	<b>\$ 8,517</b>	<b>\$ 1,783</b>
<b>BALANCE</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ (0)</b>
<b>TOTAL EXPENSE, RESERVE AND BALANCE</b>	<b>\$ 14,456</b>	<b>\$ 15,358</b>	<b>\$ 13,745</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.