

Determining the Baseline for Balboa Park Statement of Work

The purpose of this work plan is to develop the facts and projections needed by decision-makers and the public to make appropriate decisions to insure the future of Balboa Park. This baseline study is directed at fact-finding and is not meant to reach conclusions but only to provide information that future action can be based.

In preparing this study, existing studies such as the Jones and Jones Parking and Land Use Study, the Balboa Park Master Plan and the East and Central Mesa Precise Plans will be leveraged as much as possible.

1. **Project Deliverables** – A report will be issued with the following information detailed:
 - a. **Boundaries and Uses:** Describe the boundaries and identify uses and ownership of land in Balboa Park
 - i. Current land uses, both formal and informal, for all areas of the Park including diagrams or maps
 - ii. Areas requiring fees or membership to enter vs. “free” areas, including diagrams and maps of such areas
 - iii. “Owners” for various land uses in the Park, both formal and informal and the (legal) nature of the agreement. List current occupants of all areas of the Park. Note areas of formal leaseholds. Compile information on the following:
 1. Date of leasehold
 2. Date leasehold ends
 3. Relevant lease conditions, i.e. property upgrades required within a specific timeline
 4. Subsequent lease options
 5. Map or diagrams of leaseholds
 - iv. Facility usage in all areas of the Park
 1. Note shared usage of facilities
 2. Estimate hours per week of usage for public facilities within the Park
 - b. **Park Users:** Provide a breakdown of park users using information compiled in existing studies as much as possible
 - i. Local (San Diego County) vs. non-local visitors to San Diego
 - ii. Mode of travel to the park
 - iii. General intent to attend the park, i.e., to visit an institution, picnic, to attend a performance, etc.
 - iv. Timing of visits broken down, i.e., seasonally and also by day/time of day as well as average duration
 - v. Special event usage in the Park, both within and outside of the facilities
 1. Identify a criteria of “saturation” for a given area of the park or the park overall
 2. Identify areas of the park that may be classified as “saturated”

- c. **Oversight and Maintenance:** Detail the City department or responsible entity for oversight and maintenance in all areas of the Park
 - i. Entities responsible for building repair, planning, maintenance, policies, trash pick-up, lease oversight, management, etc. in all areas of the park
 - ii. Entities responsible for code compliance in all areas of the Park
 - iii. Entities responsible for law enforcement in all areas of the Park
 - iv. Entities responsible for development and planning activities in the Park
 - v. Entities responsible for long range planning in the park
 - vi. Entities responsible for the environmental review of projects in the park
 - vii. Entities responsible for connecting Balboa Park with tourism
 - viii. Entities responsible for homeless population management
- d. **Other Stakeholders:** Compile a comprehensive list of “other benevolent park entities” or “stakeholders” participating in general Park improvements and maintenance and their perceived mission including:
 - i. Advisory entities
 - ii. Lobbying entities
 - iii. Benevolent entities
- e. **Other Interested Parties:** Identify a list of stakeholders that have specific interest in Balboa Park and will likely be included in a conversation of the future of the Park, i.e., neighbors, environmental groups, etc.
- f. **Cost Outputs:** Compile a comprehensive list of current cost outputs for Balboa Park
 - i. Amounts spent by the City of San Diego or other entities for the oversight and maintenance functions in part c, *Oversight and Maintenance*.
 - ii. Amounts spent by other entities within the park for maintenance external to the buildings
 - iii. Amounts spent on average for buildings, repairs and grounds improvements regardless of funding mechanism
 - iv. Amounts spent on average per year for emergency storm drain cleanup and acts of nature
 - v. Amounts spent on average per year on cleanups of toxic waste and illegal dumping
 - vi. Amounts spent on average per year for crime and homeless population cleanup
 - vii. Amounts spent on average for publicity for the Park
 - viii. Cost of 1st amendment rallies and meetings
 - ix. Show whether the trend is increasing or decreasing taking into account inflation for different types of spending in the Park
 - x. Detail costs incurred by special events:
 - 1. General categories of special events with analysis of their true cost associated with their presence in Balboa Park
 - 2. Cumulative impacts of these special events particularly in the more saturated areas of the park

- g. **Cost Inputs:** Compile a comprehensive list of current monetary inputs that directly affect Balboa Park
 - i. Average general fund inputs
 - ii. Funding from specific taxes and bonds
 - iii. Fees from events and activities
 - iv. Fees from concessions
 - v. Fees from leaseholds
 - vi. Fines that benefit the Park
 - vii. In-kind or labor donations including:
 - 1. Park planning groups
 - 2. Docents, etc.
 - 3. Donated maintenance
 - viii. Breakdown of funding due to public grants and their origin
 - ix. Donations and private grants
 - 1. Five year average of donations from benevolent entities benefiting the general well-being of Balboa Park, ie., Friends of Balboa Park, Committee of 100 etc.
 - 2. Breakdown of funding due to private grants
- h. **Park Condition Analysis:** Provide an analysis of current park condition, a recommended park condition and gaps between the two conditions including:
 - i. A detailed condition study of all park structures using building industry standards
 - ii. Relevant unmet maintenance needs and improvements based on Master Plan, Precise Plans and the Land Use and Parking Studies. Calculate the cost of the City's portion of deferred maintenance including building structures, underground utilities, horticulture elements, etc
 - iii. Estimate of the cost to bring Balboa Park to current ADA standards in both public and private walkways (reference the Park Promenade Plan)
 - iv. Unmet wastewater/sewer replacement and maintenance needs per the Wastewater 20 Year Plan and include the potential cost to redirect sewers
 - v. Evidence of the effectiveness of current links with tourism and potential improvements, if any
 - vi. Cost of planned vegetation and tree replacement and whether a large amount will be required at a given time in the future
 - vii. Cost to bring unreinforced masonry to code throughout the Park.
 - viii. Cost to bring the Master and Precise Park Plans up-to-date. Include the update and completion of the Inspiration Point Precise Plan
 - ix. Provide an estimate of current City personnel shortages needed to operate the park effectively along with rationale including:
 - 1. Difference between need estimate and current staffing
 - 2. Cost estimate of difference
 - x. Estimate of the gap between current annual funding and needed funding to keep the Park in "above average" condition with rationale

- i. **Potential Funding:** Engage a consultant who will study potential funding sources over and above current inputs for Balboa Park and projections of how much funding could be raised considering:
 - i. Public and philanthropic fundraising
 - ii. Not-for-profit fundraising
 - iii. Corporate sponsorships and fundraising
 - iv. Government grants and matching grants
 - v. Further concessions or other means of income to the park
 - vi. Potential for improved remediation or full cost recovery for events in the park
 - vii. Potential revenue from methane available in the Arizona Landfill
 - viii. Assess potential acquisition of Developer Impact Fees (DIF) and the City's proposed General plan scheme for park improvements
 - ix. Create a public facilities financing plan for the park
 - j. **Relevant Models:** Describe models of urban park management in other cities that might be relevant to San Diego. For any example provide the following:
 - i. Give park size, basic use information and why it might be relevant to San Diego
 - ii. If leaseholds are typical of this park and what they are used for
 - iii. General information about the park's budget broken down by maintenance, management labor and general improvement dollars
 - iv. General information about where funding comes from for the park broken down by government grants, private grants and local funding
 - v. The governance model
 - vi. Known issues within that Park
 - vii. Sponsorship, naming or branding policies (i.e., in exchange for donations or for tribute) within that Park. If none of the parks studied have a branding or naming policy, provide examples of such in other parks
 - viii. Cost recovery policies/methods for that park
2. The consultants will clearly site sources of information provided within the report
 3. The consultants will make X formal presentation(s) of its findings to the Task Force for the 2007 Balboa Park Study
 4. The consultants will consider the use of supervised students to gather data and information
 5. The consultants will begin establishment of a library of related documents, ordinances and policies for Balboa Park