

The top of the slide features a banner image of the San Diego skyline across a body of water. On the left side of the banner is the official seal of the City of San Diego, which includes the text "The City of San Diego" and "America's Finest City".

The City of
San Diego
America's Finest City

Civita

Maintenance Assessment District

Park and Recreation Department

Presentation to the
Public Safety and Neighborhood Services Committee

June 5, 2013

- **Maintenance Assessment Districts (MADs)**
 - Legal mechanism by which property owners can vote to assess themselves to receive “special benefit” services above-and-beyond what the City normally provides
- **Special Benefit**
 - Defined as a particular and distinct benefit over and above general benefits conferred on real property located in the district or to the public at large
 - Quantified and apportioned in Assessment Engineer’s Report (AER) for district
 - Only special benefits may be assessed to property owners

- **General Benefit**

- Services normally provided by the City
- MADs that provide general benefits for certain services are funded as follows:
 - Gas Tax reimburses for median maintenance
 - Environmental Growth Fund reimburses for open space maintenance
 - General Fund reimburses for landscape maintenance of parks
 - General Fund maintains standard street lights
- Benefit that accrues to parcels outside the MAD boundary and/or to the public at large

- **Legal Authority**

- *Landscaping & Lighting Act of 1972*
(California Streets & Highways Code §22500 et seq.)
- *Proposition 218*
(California Constitution, Article XIID)
- *Maintenance Assessment District Ordinance*
(San Diego Municipal Code §65.0201 et seq.)
- *Funding for Maintenance Assessment District Formation*
(Council Policy 100-21)

- **Steps to Form a New MAD:**
 - Applicants define scope of services/improvements and preliminary district boundaries
 - Staff and applicants estimate costs
 - Identify improvements to be maintained by MAD
 - Establish costs for maintenance
 - Determine district formation costs
 - Assessment Engineer (consultant) develops apportionment methodology and reviews/confirms boundaries
 - City Council considers and approves MAD concept
 - Staff prepares and issues ballots to property owners
 - Weighted vote
 - 50% + 1 of returned ballots required to approve
 - City Clerk tallies the results

- **Civita**

- Located on former rock quarry site north of Friars Road, west of Interstate 805, south of Phyllis Place, and east of Mission Center Road
- Entitled as “Quarry Falls”
- Site development permit, specific plan, and vesting tentative map approved in 2008
- Developer (applicant) approached City to form a MAD to maintain public areas around same timeframe
- Civita Public Maintenance Corporation, a non-profit corporation, is planned to administer contracts for goods and services on behalf of the MAD

- **Proposed Scope of Services**

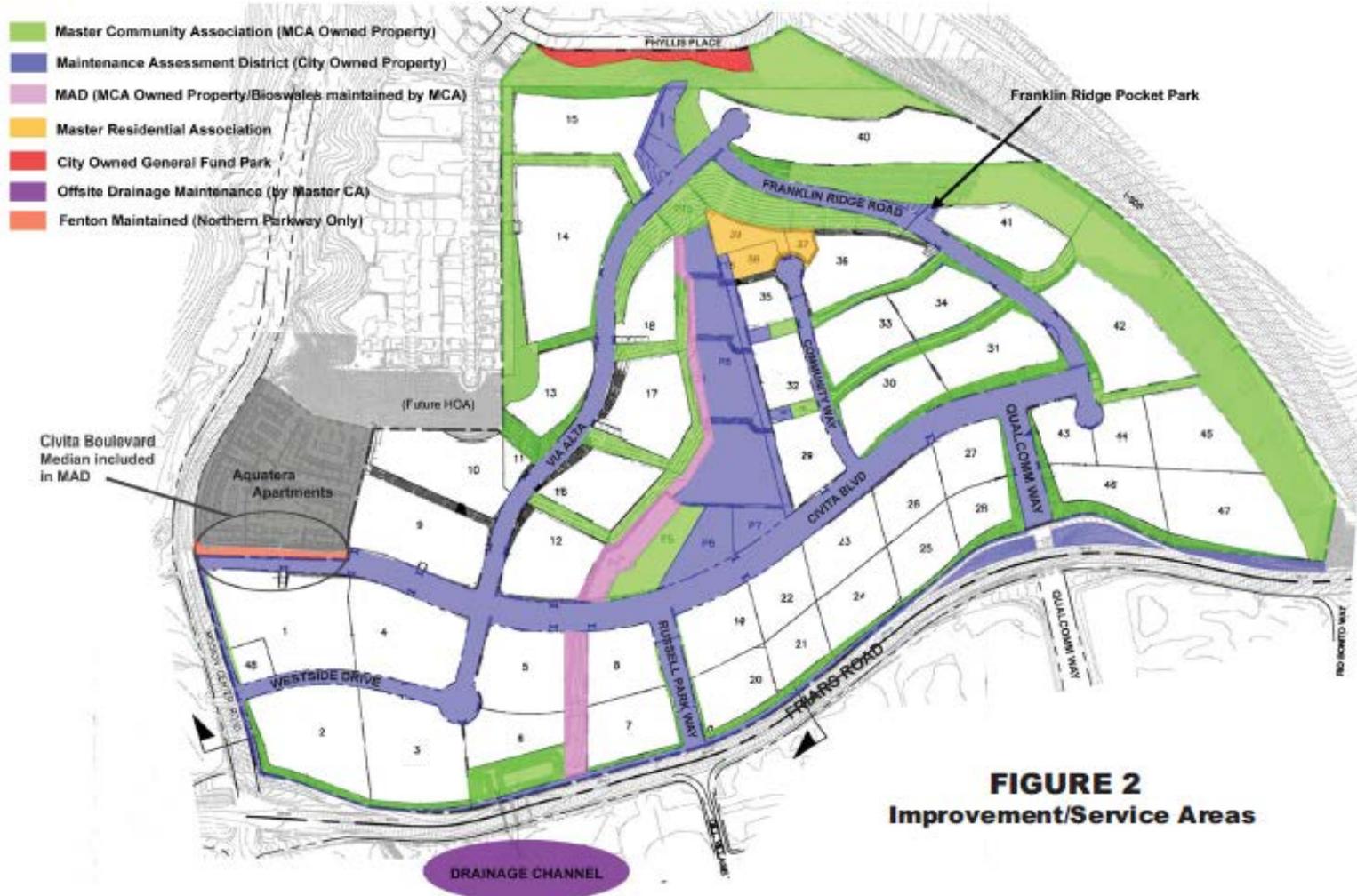
- Landscaped Parkways, Enhanced Medians, Decorative Street Lights, and other Community Features (monuments & banners):

- Civita Boulevard
- Franklin Ridge Road
- Friars Road (north side within project limits)
- Qualcomm Way (within project limits)
- Russell Parkway
- Via Alta

- Parks and Mini-Parks:

- Central Park
- Creekside Park
- Franklin Ridge Pocket Park

- **Map**



- **Assessment Engineering**
 - EFS Engineering prepared AER
 - Only benefitting parcels considered for proposed district
 - **Equivalent Benefit Units (EBUs)** apportionment methodology (based on land use)

Total Assessment = Total EBUs x Unit Assessment Rate

**EBUs = (Acres, Building Area, or Units)
x Land Use Factor x Benefit Factor**

- **Assessment Engineering (cont'd)**
 - General Benefit Calculation:
 - Contributions from General Fund for parks
 - Contributions from Gas Tax for medians
 - Contributions from Civita HOA for other public benefits
 - Aquatera Apartments development excluded as adjacent frontage will not be maintained by MAD

- **Assessment Engineering (cont'd)**

	FY 2014 Proposed	Maximum Authorized
Parcels	21 ⁽¹⁾	--
EBUs	283.66	4,086.56 ⁽²⁾
Assessment Rate	\$299.80	\$299.80 ⁽³⁾
Total Assessment Revenue	\$85,042	\$1,225,149 ⁽³⁾

(1) Parcel count will increase as properties are developed and sold.

(2) "Maximum authorized" EBU count is based on current development plans.

(3) Assessment rate is authorized to increase by San Diego Consumer Price Index All Urban Consumers (SDCPI-U) plus 4% annually. This inflationary factor will also increase the total assessment revenue.

- **Community Outreach:**
 - Proponent:
 - Quarry Falls LLC
(developer of Civita/lead applicant)
 - Public Presentations by Quarry Falls LLC:
 - Mission Valley Planning Group
 - Disclosure of pending Civita MAD formation to new home buyers/property owners

CIVITA MAD BUDGET

**FY 2014
Proposed**

**Maximum
Authorized**

District Expenditures and Reserves

Contract Administration (Civita Public Maint Corp)	\$9,480	\$130,340
Contract Services	\$40,250	\$611,662
Other Supplies and Services	\$3,000	\$65,000
Special Districts Administration (City)	\$3,500	\$34,757
Utilities (Water, Storm Drain, Electrical)	\$19,950	\$192,269
Capital Improvements Program	\$3,512	\$117,365
Contribution to District Reserve	\$14,159	\$186,125
TOTAL	\$93,851	\$1,337,518

District Revenues

Special Assessments	\$85,042	\$1,225,149
General Benefit (City and HOA Contributions)	\$8,809	\$112,369
TOTAL	\$93,851	\$1,337,518

- **Formation Schedule**

- Requested PS&NS Committee Action:

- Advance Civita MAD formation to City Council

- City Council Resolution of Intention to Form District (July 2013):

- Request approval to initiate the formation process
- Commence the 45-day balloting period
- Schedule a public hearing for September 2013

- **Formation Schedule (cont'd)**
 - Ballot (45 days between July and September 2013)
 - Sent to each property owner
 - Question 1: Whether to form the Civita MAD
 - Question 2: Whether to authorize Civita Public Maintenance Corporation to administer contracts for goods and services
 - City Council Public Hearing (September 2013)
 - Held at the conclusion of the balloting period
 - City Clerk will count ballots and announce results
 - City Council has authority to form MAD if majority of returned ballots are in favor of forming Civita MAD

- **MAD Webpage**

<http://www.sandiego.gov/park-and-recreation/general-info/mads/>

The screenshot shows the website header with the City of San Diego logo and a navigation menu. The main content area is titled "Maintenance Assessment Districts" and includes a list of links and a descriptive paragraph.

Park & Recreation

PARK & RECREATION HOME | **GENERAL INFORMATION** | RECREATION CENTERS AND POOLS | PARKS & OPEN SPACE | GOLF COURSES | RECREATIONAL ACTIVITIES & PROGRAMS

Park & Recreation Home • *General Information* • *Maintenance Assessment Districts*

General Information

- [General Information Home](#)
- [Boards & Committees](#)
- [Park & Recreation Budget Update](#)
- [Park Standards](#)
- [Community Gardens](#)
- [Employment Opportunities](#)
 - [Internship Opportunities](#)
 - [Volunteer Opportunities](#)
- Maintenance Assessment Districts
- [Mount Hope Cemetery](#)
- [Golf Division - Business Plan Update Committee](#)
- [Videos](#)

FAST FACTS (PDF)

Maintenance Assessment Districts

- [Map of Maintenance Assessment District Boundaries \(PDF\)](#)
- [Map of Street Lighting District #1 Sub-District Boundaries \(PDF\)](#)
- [Assessment Engineer Reports](#)
- [How Maintenance Assessment Districts Are Formed](#)
- [How To Establish A Maintenance Assessment District](#)
- [Laws Concerning Maintenance Assessment Districts](#)
- [Special Benefits Funded By Maintenance Assessment Districts](#)
- [Upcoming Public Maintenance Assessment District Meetings \(Select "Miscellaneous" from the menu\)](#)
- [First San Diego River Improvement Project \(FSDRIP\) Natural Resource Management Plan \(NRMP\)](#)

A Maintenance Assessment District (MAD) is legal mechanism by which property owners can vote to assess themselves to pay and receive services above-and-beyond what the City of San Diego normally provides. This above-and-beyond service level is called a "special benefit." What the City normally provides is called the "general benefit."

MADs may also be known as Landscape Maintenance Districts (LMDs), Lighting and Landscape Maintenance Districts (LLMDs), Enhanced Maintenance Assessment Districts (EMADs), or Community Benefit Districts (CBDs). Because many districts include more than landscaping and lighting, the name was changed to better represent the nature of the districts.