

DATE ISSUED: December 1, 2004 REPORT NO. 04-255

ATTENTION: Honorable Mayor and Council Members
Agenda of December 7, 2004

SUBJECT: Renewal of Lease and Joint Use Agreements for Joint Use
Facilities

REFERENCE: 1) Council Policy 700-35, City Development of School Sites for
Park Purposes;
2) 1948 Recreation Agreement with the San Diego Unified School
District; and
3) Memorandum of Understanding between the City of San Diego
and San Diego Unified School District for Development and
Maintenance of Joint Use Facilities (MOU)

SUMMARY

- Issue #1 - Should the City of San Diego (City) pursue the renewal of 25-year lease and joint use agreements with the San Diego Unified School District (District) when capital improvements or an increased level of maintenance are required to enable a joint use site to endure an additional 25 years of use in a safe condition and an acceptable quality?
- Issue #2 - Should the City renew 25-year lease and joint use agreements with the District for development and maintenance of joint use facilities at Crown Point Elementary School, Doyle Elementary School, Jerabek Elementary School, Lewis Middle School, Mann Middle School and Marston Middle School?

Manager's Recommendations -

- 1) Approve the concept of renewing expired, or expiring, lease and joint use agreements with the District when capital improvements or an increased level of maintenance is required to enable a joint use site to endure an additional 25 years of use in a safe condition and an acceptable quality;
- 2) Renew expired, or expiring lease and joint use agreements by entering into new 25-year lease and joint use agreements with the District to continue the joint use facilities at Crown Point Elementary School, Doyle Elementary School, Jerabek Elementary School, Lewis Middle School, Mann Middle School and Marston Middle School; and
- 3) Approve an increased level of maintenance for the joint use field at Crown Point Elementary School, for which additional funding will be required to be secured in the Fiscal Year 2006 Park and Recreation Operating Budget.

Other Recommendations - The San Diego City Schools' Board of Education has approved the lease and joint use agreements for these sites as follows: Crown Point Elementary School, Doyle Elementary School, Jerabek Elementary School, Mann Middle School and Marston Middle School at their meeting of December 9, 2003, and Lewis Middle School at their meeting of April 20, 2004.

Other Recommendations - Park Planning and Development Division staff solicited public input from the appropriate Recreation Councils for each site and received a recommendation for approval to renew the joint use agreements, as follows:

Crown Point Elementary School - (Santa Clara Recreation Council, February 20, 2001,
Vote: unanimous approval)

Doyle Elementary School - (Doyle Recreation Council, August 26, 2003,
Vote: unanimous approval)

Jerabek Elementary School - (Scripps Ranch Recreation Council, September 11, 2003,
Vote: unanimous approval)

Lewis Middle School - (Allied Gardens Recreation Council, November 3, 2003,
Vote: unanimous approval)

Mann Middle School - (Colina del Sol Recreation Council, May 15, 2002,
Vote: unanimous approval)

Marston Middle School - (South Clairemont Recreation Council, March 28, 2002,
Vote: unanimous approval)

Fiscal Impact - Maintenance Requirements: The maintenance of these joint use facilities have been the responsibility of the Park and Recreation Department's Operating Division for the past 25 years. When parity is met pursuant to the formula outlined in the MOU, the maintenance costs will be shared equally

between the City and the District. Parity calculations are outlined in Exhibit B attached to each proposed agreement. Based on the parity calculations, the City will continue to be responsible for maintenance at all six sites within the foreseeable future.

Five of the six sites will continue to require standard maintenance, as described in the DISCUSSION section of this report, which has been provided during the past term of the agreements. Annual standard maintenance for these five sites is estimated to be as follows, which is currently included in the Park and Recreation Department's Fiscal Year 2005 Operating Budget:

Doyle Elementary School	\$ 34,595
Jerabek Elementary School	\$ 31,280
Lewis Middle School	\$ 73,810
Mann Middle School	\$ 35,190
Marston Middle School	<u>\$ 15,950</u>
Total	\$190,825

Crown Point Elementary is the only site proposed for renewal which is under the minimum acreage recommended in the MOU to receive standard maintenance. However, it is large enough to be successfully maintained with an enhanced level of maintenance, as allowed for in the MOU. A higher level of maintenance for the joint use facilities at this site will require an annual increase to the Park and Recreation Department's Operating Budget of approximately \$6,800, (\$25,415 enhanced maintenance minus \$18,615 current maintenance budgeted in Fiscal Year 2005 = \$6,800 required increase.)

Capital Improvement Requirements: Each of the six sites requires a one-time, capital expenditure to upgrade, renovate or replace facilities in order to endure another 25 years of joint use. Capital improvement costs recommended for each site are as follows:

Crown Point Elementary School	\$ 50,000
Doyle Elementary School	\$ 50,000
Jerabek Elementary School	\$ 20,000
Lewis Middle School	\$ 90,000
Mann Middle School	\$500,000
Marston Middle School	<u>\$ 50,000</u>
Total	\$760,000

BACKGROUND

The City's Progress Guide and General Plan recommends 10 usable acres of neighborhood park (or five usable acres of parkland if located adjacent to an elementary

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school) for every 3,500 to 5,000 residents. In areas of the city where parkland is deficient per the City's General Plan standards, joint use facilities have provided a venue for City recreation programs typically provided at neighborhood parks. A joint use facility is defined as land or facilities that are owned by the City or another agency and shared between agencies to meet the recreational and physical education needs of both agencies.

The City and the District have been cooperating in the use of numerous recreational facilities in accordance with the City-District Recreation Agreement of September 1948, and the Memorandum of Understanding between the City and District for the Development and Maintenance of Joint Use Facilities adopted by the San Diego City Council on October 7, 2002 (Resolution No. 297149), and by the District's Board of Education on October 8, 2002.

Currently, the City has approximately 100 joint use agreements with various school districts city-wide. To date, 25 existing joint use agreements between the City and District have expired, and were temporarily extended on a month-to-month basis until January 14, 2005 pursuant to the Amendment for the Extension of Certain Joint Use Agreements between the City of San Diego and the San Diego Unified School District, adopted by City Council on December 9, 2002 (Resolution No.R-97454.) The facilities will be operated and maintained in accordance with these new 25-year lease and joint use agreements. Additionally, eight additional sites will expire by the end of calendar year 2004. The proposed new agreements replace the existing joint use agreements and are consistent with the MOU, which documents financial equity between the two agencies. The sites with expired joint use agreements include the following:

- | | |
|----------------------------------|-----------------------------------|
| 1. Adams Elementary School | 14. Lewis Middle School |
| 2. Cabrillo Elementary School | 15. Mann Elementary School |
| 3. Crown Point Elementary School | 16. Marston Middle School |
| 4. Dailard Elementary School | 17. Mason Elementary School |
| 5. Decatur Elementary School | 18. Memorial Community Park |
| 6. Doyle Elementary School | 19. Mesa Viking Neighborhood Park |
| 7. Ericson Elementary School | 20. Mira Mesa High School |
| 8. Field Elementary School | 21. Ocean Beach Elementary School |
| 9. Forward Elementary School | 22. Pacific Beach Middle School |
| 10. Hoover High School | 23. Penn Elementary School |
| 11. Jerabek Elementary School | 24. Serra High School |
| 12. Kennedy Elementary School | 25. Tierrasanta Elementary School |
| 13. King Elementary School | 26. Walker Elementary School |

The sites which will expire by the end of calendar year 2004 include the following:

1. Alcott Elementary School
2. Bird Rock Elementary School
3. Clay Elementary School

4. Cadman Elementary School
5. Fletcher Elementary School
6. Hardy Elementary School
7. Juarez Elementary School
8. Valencia Elementary School

Of the 34 expired or expiring joint use sites, five will not be renewed due to various reasons, such as lack of community support, limited recreational use of high school sites, increased or decreased school district needs, etc. These sites include Decatur Elementary School (School District requested to not renew – field needed by La Jolla High School), Hoover High School (Recreation Council requested to not renew), Kennedy Elementary School (being replaced with new Kennedy/Porter Twin School), Mesa Viking Neighborhood Park (adjacent to Ericson Elementary School – not needed by School District), Mira Mesa High School (City and School District agreed to not renew), and Ocean Beach Elementary School (site had two leases of which first one covering a portion of site expired - current lease does not expire until 2022 and covers entire site).

DISCUSSION

The MOU defines the criteria for determining the feasibility and acceptability of potential joint use sites. The criteria includes regional and site-specific factors, such as: 1) park land deficiency per General Plan standards, 2) available resources or capital and maintenance costs, 3) size of available area for joint use playfield, and 4) number of student population. All of these factors have implications for maintenance. For example, a two acre minimum size is recommended in order to provide the quality of turf facilities expected by the community and the District for safe recreational and physical education uses. Sites less than two acres in size, or with a high student population, present maintenance challenges for the City which can result in unsafe and unsightly facilities and require a higher level of maintenance, as identified in the MOU. Therefore, to address this issue, the City and District have agreed to apply the following thresholds and types of joint use surfaces for future joint use playfields:

- For joint use sites less than 1½ acres, artificial turf is recommended.
- For joint use sites between 1½ and 2 acres, natural turf is acceptable with an enhanced level of maintenance, however artificial turf is acceptable.
- For joint use sites 2 acres and larger, natural turf is recommended with standard maintenance.

The difference between standard and enhanced maintenance involves the number of times the turf is fertilized, aerated and top-dressed on an annual basis. Standard maintenance for turf playfields is estimated to be \$8,500 per acre per year, while enhanced maintenance is estimated to be \$12,500 per acre per year. When parity is met,

pursuant to the formula outlined in the MOU, the maintenance costs will be shared equally between the City and District.

The following discussion pertaining to each proposed joint use site which is the subject of this report, identifies the size and type of joint use facilities, as well as the associated fiscal impact, in terms of annual maintenance and one-time capital costs. A site evaluation was conducted for each joint use facility to identify any necessary upgrades which would enable the facility to endure another 25 years of use. A compilation of the estimated costs for all sites is offered in the Fiscal Impact section of this report.

Crown Point Elementary School:

Crown Point Elementary School is located at 4033 Ingraham Street, San Diego, California, 92109, in the Pacific Beach Community. A 25-year lease and joint use agreement with the DISTRICT for this school site expired on August 26, 2002, and it has been operating under the month-to-month agreement since that time. The terms of the previous and new agreements provide for the design, construction, operation and maintenance of approximately 2.2 acres of a joint use area, comprised of 1.7 acres of turfed multi-purpose sports fields, 0.5 acre running track and four backstops.

Fiscal Impact for Crown Point Elementary School: Joint use sites with less than two acres of turf require an enhanced level of maintenance, consistent with the MOU. Therefore, the annual maintenance cost for this joint use site is estimated to be \$25,415. The standard level of maintenance, as this joint use site currently receives, is estimated to be \$18,615, for which funding is budgeted in FY 2005. The additional \$6,800 in required annual maintenance cost will be requested as a new facility "add" in the Fiscal Year 2006 Park and Recreation Department Operating Budget.

Additionally, irrigation system renovation is needed at this site in order for the improvements to endure the entire length of this new 25-year lease and joint use agreement. Without this renovation, the joint use facilities would not be in compliance with the terms of the joint use agreement. The estimated cost for this renovation is \$50,000. The Park Planning and Development Division staff will work with the Council District 2 office to identify appropriate funding for these capital improvements. Identified funding will be added to the Fiscal Year 2005 Park and Recreation Department Capital Improvements Program (CIP) Budget via 1472.

Doyle Elementary School:

Doyle Elementary School is located at 3950 Berino Court in the University City Community. A 25-year lease and joint use agreement with the District for this school site expired on August 26, 2002, and it has been operating under the month-to-month agreement since that time. The terms of the previous and new agreements provide for the design, construction, operation and maintenance of approximately 4.07 acres of a joint use area, comprised of 0.6 acres of parking lot, 3.19 acres of turfed multi-purpose sports fields, 0.28 acre of infield and four backstops.

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Fiscal Impact for Doyle Elementary School: Annual maintenance at this joint use site is estimated to be \$34,595.00, for which funding is budgeted in FY 2005. Irrigation system renovation is needed at this site in order for the improvements to endure the entire length of this new 25-year lease and joint use agreement. Without this renovation, the joint use facilities would not be in compliance with the terms of the joint use agreement. The estimated cost for this renovation is \$50,000. The Park Planning and Development Division staff will work with the Council District 1 office to help identify appropriate funding for these capital improvements. Identified funding will be added to the Fiscal Year 2005 Park and Recreation Department Capital Improvements Program (CIP) Budget via 1472.

Jerabek Elementary School:

Jerabek Elementary School is located at 10060 Avenida Magnifica in the Scripps Miramar Ranch Community. A 25-year lease and joint use agreement with the DISTRICT for this school site expired on August 26, 2002, and it has been operating under the month-to-month agreement since that time. The terms of the previous agreement provided for the design, construction, operation and maintenance of approximately 3.68 acres of a joint use area. The joint use area is comprised of 2.67 acres of turfed multi-purpose sports fields, 0.48 acre of infield, 0.53 acre stabilized decomposed granite running track, six backstops, two storage containers and one batting cage.

Fiscal Impact for Jerabek Elementary School: Annual maintenance at this joint use site is estimated to be \$31,280.00, for which funding is budgeted in FY 2005. Minor irrigation system renovation is needed at this site in order for the improvements to endure the entire length of this new 25-year lease and joint use agreement. Without this renovation, the joint use facilities would not be in compliance with the terms of the joint use agreement. The estimated cost for this renovation is \$20,000. Park Planning and Development Division has worked with the Council District 5 office to identify appropriate funding for these capital improvements. Identified funding will be added to the Fiscal Year 2005 Park and Recreation Department Capital Improvements Program (CIP) Budget via 1472.

Lewis Middle School:

Lewis Middle School is located at 5170 Greenbrier Avenue, San Diego, California, 92120 in the Allied Gardens Community. Phased construction at this site has resulted in three separate joint use agreements for this site. A 25-year lease and joint use agreement with the District for the lighted field expired on August 26, 2002, and it has been operating under the month-to-month agreement since that time. The agreement for the Lower Lewis turfed field expires December 3, 2004 and the newly developed Skunk Hollow turfed field expires January 7, 2028. The new agreement consolidates all joint use areas into one agreement, consistent with the MOU. The terms of the previous

agreements provided for the design, construction, operation and maintenance of approximately 9.58 acres of joint use areas, consisting of three areas as described below:

Lower Lewis: 3.7 acres of irrigated and turfed play fields, 0.44 acres of decomposed granite sideline area, 0.73 acres of skinned infields, two City backstops and one District backstop;

Skunk Hollow: 1.83 acres of irrigated and turfed play fields, 0.34 acres of stabilized decomposed granite running track and two District backstops; and

Upper Lewis: 2.22 acres of decomposed granite fields, 0.32 acres of skinned infield, ballfield lighting and its associated electrical system at the ballfield, City backstop and two District backstops.

Fiscal Impact for Lewis Middle School: Annual maintenance at this joint use site is estimated to be \$73,810.00, for which funding is budgeted in FY 2005. Repair of concrete stairs, irrigation system renovation, turf renovation and repair of the existing ballfield lights are needed at this site in order for the improvements to endure the entire length of this new 25-year lease and joint use agreement. Without this renovation, the joint use facilities would not be in compliance with the terms of the joint use agreement. The estimated cost for this renovation is \$90,000. The Park Planning and Development Division staff will work with the Council District 7 office to identify appropriate funding for these capital improvements. Identified funding will be added to the Fiscal Year 2005 Park and Recreation Department Capital Improvements Program (CIP) Budget via 1472.

Mann Middle School:

Mann Middle School is located at 4345 54th Street in the Eastern sub-area of the Mid-City Community. A 25 year lease and joint use agreement with the District for this school site expired on August 26, 2002, and it has been operating under the month-to-month agreement since that time. The terms of the previous agreement provided for the design, construction, operation and maintenance of approximately 4.14 acres of a joint use area. The joint use area is comprised of 2.67 acres of turfed multi-purpose sports fields with 0.63 acres of infield, 0.84 acre stabilized decomposed granite running track, and six backstops.

Fiscal Impact for Mann Middle School: Annual maintenance at this joint use site is estimated to be \$35,190.00, for which funding is budgeted in FY 2005. Irrigation system and turf renovation is needed at this site in order for the improvements to endure the entire length of this new 25-year lease and joint use agreement. Without this renovation, the joint use facilities would not be in compliance with the terms of the joint use agreement. The estimated cost for this renovation is \$500,000. The Park Planning and Development Division staff will work with the Council District 7 office to identify appropriate funding for these capital improvements. Identified funding will be added to

the Fiscal Year 2005 Park and Recreation Department Capital Improvements Program (CIP) Budget via 1472.

Marston Middle School:

Marston Middle School is located at 3799 Clairemont Drive in the Clairemont Mesa Community. A 25-year lease and joint use agreement with the District for this school site expired on August 20, 2002, and it has been operating under the month-to-month agreement since that time. The terms of the previous agreement provided for the design, construction, operation and maintenance of approximately 2.9 acres of a joint use area. The joint use area is comprised of 2.5 acres of decomposed granite multi-purpose sports fields, 0.4 acre of infield, two backstops, two sets of bleachers, ball field lighting with associated equipment, and one storage container

Fiscal Impact for Marston Middle School: Annual maintenance at this joint use site is estimated to be \$15,950, for which funding is budgeted in FY 2005. Electrical system renovation is needed at this site in order for the improvements to endure the entire length of this new 25-year lease and joint use agreement. Without this renovation, the joint use facilities would not be in compliance with the terms of the joint use agreement. The estimated cost for this renovation is \$50,000. The Park Planning and Development Division staff will work with the Council District 6 office to identify appropriate funding for these capital improvements. Identified funding will be added to the Fiscal Year 2005 Park and Recreation Department Capital Improvements Program (CIP) Budget via 1472.

CONCLUSION

The joint use and optimization of community assets benefits both the City and the San Diego Unified School District. The proposed joint use agreements are equitable for both agencies in accordance with the MOU. All funding approved to perform capital improvements at joint use site(s) will be factored into the parity calculations, which are to be reviewed and mutually revised, by each agency bi-annually to determine the length of time before maintenance is equally shared.

The consequence of not approving the lease and joint use agreements will mean the loss of much-needed recreation assets and loss of the capital investment for improvements made at each site over the years. The City has made an investment of over \$10.0 million in these six sites over the term of the expired or expiring agreements, for which a total of \$4,458,000 has been spent on maintenance costs and \$5,550,000 has been spent on capital costs. To date, the total capital investments at each site are as follows:

Crown Point Elementary:	\$ 438,000
Doyle Elementary:	\$ 814,000
Jerabek Elementary:	\$ 851,000
Lewis Middle School:	\$2,044,000

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Mann Middle School:	\$ 828,000
Marston Middle School:	\$ 580,000
Total	\$5,555,000

ALTERNATIVES

1. Approve the new lease and joint use agreements with modifications.
2. Do not approve the new lease and joint use agreements.

Respectfully submitted,

Ellen Oppenheim
Park and Recreation Director

Approved: Bruce Herring
Deputy City Manager

EO/DS

Note: The attachment is available for review in the Office of the City Clerk.

Attachments: Memorandum of Understanding Between City of San Diego and San Diego Unified School District for Development and Maintenance of Joint Use Facilities (referenced Master Agreement dated October 8, 2002, filed with City Clerk on May 14, 2003, is available for review at the City Clerk's Office)

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