

THE FUTURE OF BALBOA PARK: FUNDING, MANAGEMENT AND GOVERNANCE

**A REPORT FROM THE BALBOA PARK COMMITTEE
SUBMITTED TO THE MAYOR & CITY COUNCIL OF SAN DIEGO**



ADOPTED BY THE BALBOA PARK COMMITTEE, DECEMBER 18, 2008

ACKNOWLEDGEMENTS

Balboa Park Committee

1. Vicki Granowitz Chairperson, North Park Planning Committee Representative
2. Mike McDowell Vice-Chairperson
3. Jennifer Ayala Center City Advisory Committee Representative
4. Laurie Burgett Greater Golden Hill Planning Committee Representative
5. Jeri Dilno Member-at-Large
6. Dr. Michael Hager Large Institution Representative
7. Dr. Andrew Kahng Balboa Park/Morley Field Recreation Council Representative
8. David Kinney Small/Medium Institution Representative
9. Michael L. Singleton Uptown Planners Representative
10. Donald Steele Member-at-Large

San Diego Foundation: Bob Kelly, President and CEO

Legler Benbough Foundation: Peter Ellsworth, President

Parker Foundation: William E. Beemer, President

**City of San Diego Mayor Jerry Sanders
District Three Councilmember Toni Atkins**

Park and Recreation Department

Stacey LoMedico, Director

Kathleen Hasenauer, Deputy Director

Bruce Martinez, District Manager

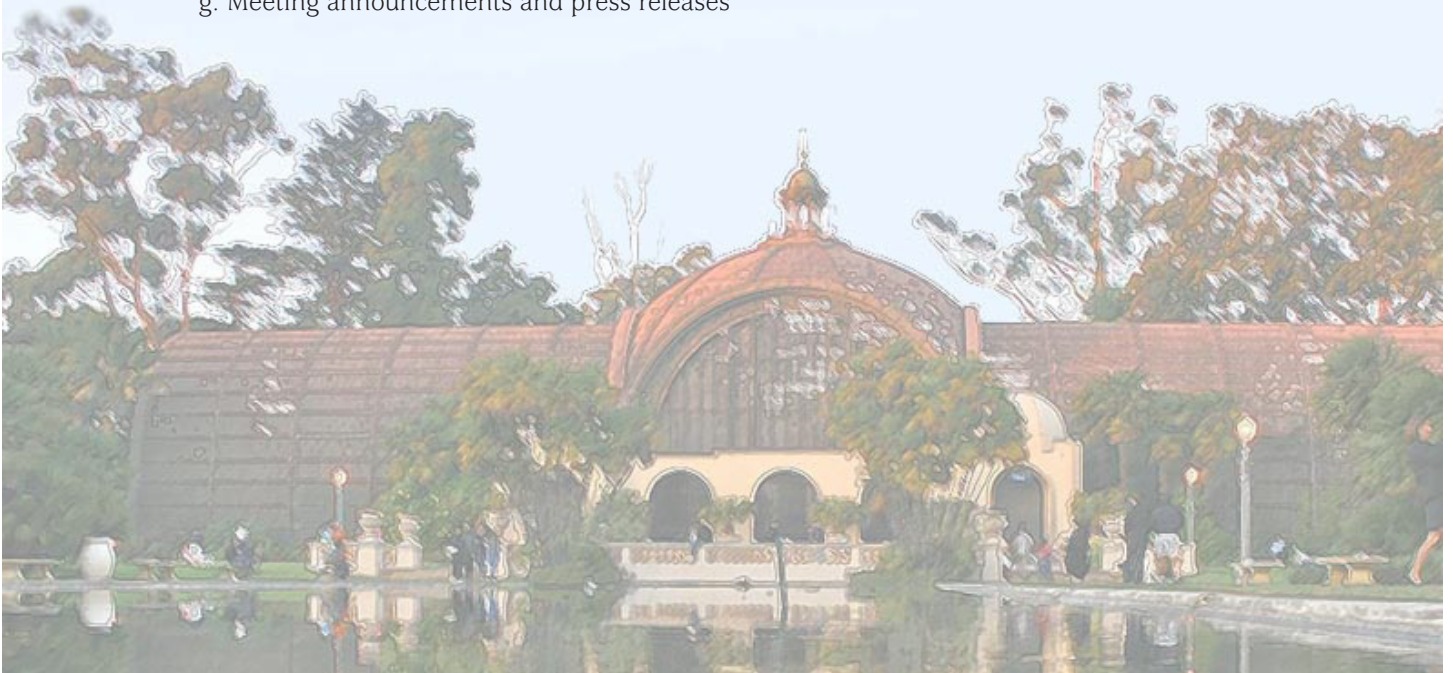
Susan Lowery-Mendoza, District Manager

**Balboa Park Central, Balboa Park Marketing, Pam Crooks, Phil Rath,
Jeffrey Tom, Vanessa Nieves, Marisa Aurora Quiroz, Don Liddell
General Services/Communications Division, City TV 24.
Document layout and photographs courtesy of Michael Singleton.**



TABLE OF CONTENTS

Section	Page #
Acknowledgements.....	Inside Cover
1. Executive Summary	Page 4
2. Introduction and Process	Page 5
3. Question 1 Response: Can the City of San Diego financially support Balboa Park today and into the future?	Page 8
4. Question 2 Response: Even if it can, should the City provide all the funding for Balboa Park?	Page 11
5. Question 3 Response: If the City wishes to expand management and governance of Balboa Park, what are the alternatives to do so?.....	Page 15
6. Next Steps: Recommendations for setting up a “Second Phase” process	Page 26
7. Bibliography	Page 28
8. Appendices	On CD-Rom
a. Agendas	
b. Notes	
c. Minutes	
d. Study overview	
e. Frequently asked questions	
f. Web addresses	
g. Meeting announcements and press releases	



SECTION

1

EXECUTIVE
SUMMARY**Executive Summary**

In January 2008, the **Balboa Park Committee** (BPC) was tasked by the **City of San Diego Mayor Jerry Sanders** and **Third District Councilmember Toni Atkins** with examining the future of Balboa Park. The task included answering the following questions: **(1)** What is the City's ability to provide the necessary financial support for Balboa Park in the future? **(2)** Even if the City can tackle the challenge on its own, should it? **(3)** Should management and governance be expanded and, if so, how?

As a result of its deliberations, the BPC recommends that the City of San Diego further study, and consider formation of, a new public benefit non-profit entity to assist the City with governance, fund-raising and management of Balboa Park through a contractual agreement with the City.

The BPC also recommends that the Mayor and City Council support a second phase of this effort, by creating a working group or **"Balboa Park Task Force"** to further refine the BPC recommendations. This second phase should lead to the creation of a new public benefit entity, delineate responsibilities and obligations assigned to the City and to the new entity, and broaden public participation in the discussion and decision-making process.

These conclusions are based on nine months of public hearings and investigation on the following three questions posed by the study, *"The Soul of San Diego: Keeping Balboa Park Magnificent in its Second Century."* The questions and responses by the BPC are summarized below:

Can the City of San Diego financially support Balboa Park today and into the future? The City has the potential to provide the necessary financial support, but, from a financial and management perspective, the City has never made it a high enough priority to fully commit to the funding needed. As competition increases for limited public financial resources, a look at the past portends that the City will not be able to provide the resources necessary to fulfill Balboa Park's management and operational needs, to address maintenance, repairs and replacement requirements, or to implement already approved capital improvement projects.

Even if the "City" can, should it do so? The City of San Diego should not act alone in financing and operating Balboa Park, but must build on existing partnerships, identify new partnerships, increase private donations, create new sources of revenue, and provide a process to ensure that donations for projects and services match priorities.

If the "City" wishes to expand management and governance of "Balboa Park," what are the alternatives to do so? Fund-raising, management and governance should be expanded through the creation of a new, public benefit non-profit entity that will work in a contractually defined public/private partnership, following steps that have worked successfully for similar large urban parks studied, augmented by a process that is unique to San Diego and Balboa Park.

SECTION

2

INTRODUCTION

AND

PROCESS

Introduction and Process

In early 2006, a local foundation with a long history of charitable giving to institutions in Balboa Park began to look at possible options for more successfully operating and funding our City's beloved Park. The Legler Benbough Foundation was concerned about the challenges the Park was facing in light of San Diego's increasing financial difficulties due to pension underfunding, among other political and financial realities. The Foundation commissioned the Center for City Park Excellence of the Trust for Public Land to produce a concise study of management and fund-raising models involving public/private partnerships in five other major U.S. cities with large urban parks.

This report, titled "*Keeping Balboa Park Magnificent in its Second Century*," completed in August 2006, generated considerable interest and discussion in the City and led to a much larger fact-gathering study to examine current capital and deferred maintenance needs in Balboa Park, to learn who the users are and what their impressions are of Balboa Park, and to better understand current management and planning issues.

Two other foundations with long ties to Balboa Park, The San Diego Foundation and the Parker Foundation, joined the Legler Benbough to fund the more comprehensive effort. The Center for City Park Excellence, once again retained to produce the report on Balboa Park, was asked to address possible governance alternatives and funding options for the future. Their report entitled "*The Soul of San Diego: Keeping Balboa Park Magnificent in its Second Century*," raised and attempted to answer three important questions, without making specific recommendations on where the City of San Diego should go from here:

1. Who uses Balboa Park and what do they do there?
2. Is there a demonstrable need for capital repairs and improvements in Balboa Park, and if so, what is the magnitude of the need?
3. What are the issues with Park governance?

Supporting research and documentation was provided by The Keston Institute for Public Finance and Infrastructure Policy at the University of Southern California, and by the Morey Group, a market research and consulting firm specializing in statistical analysis for the "cultural attraction industry". A complete copy of "*The Soul of San Diego*," including the supporting documentation is included and referred to throughout this report.

The results of the larger study are startling. A few key points: Balboa Park is among the most heavily used city parks in the U.S. Only 24% of persons interviewed in the Park live in the City of San Diego, and of those, the largest percentage were Hispanic. Of non-city residents, 75% stated that the Park was the primary or one of several reasons for visiting San Diego. Nearly 69% came to the Park because of a museum, a theater or the Zoo.

Although not a complete list, capital and infrastructure project needs totaling a minimum of \$238 million were identified. Concerning governance, the Park and Recreation Department manages 400 other properties in addition to Balboa Park and has evolved a particularly opaque budgetary and accounting system when compared with other urban park and recreation departments around the country.



Significant findings cited in the report include:

“...there is no official body with the focus on Balboa Park and the authority to help the Park be successful...”

“...serious doubts exist regarding the current Park management structure and these must be addressed if there is any hope of engaging the citizenry and the donor community...”

“...these factors (too little funding and too little clarity about leadership and authority) represent a powder keg...”

At the same time, San Diegans do not perceive problems with the Park because it is so intrinsically beautiful: “a walk through (the Park) still inspires enjoyment for the vast majority of visitors.” In fact, 95% of telephone survey respondents rated their satisfaction with the Park as “excellent” or “good.”

In addressing the three original questions, the Center for City Park Excellence posed three additional important questions, partially answered them, and recommended an extended period of time for public review and consideration:

1. Can the City of San Diego solve these problems on its own?
2. Even if the City can tackle the challenge on its own, should it?
3. If the funding and management of Balboa Park were broadened, what are the alternatives?

When Mayor Jerry Sanders was presented with the results of the study in January 2008, he and Councilmember Toni Atkins (whose Council District Three includes Balboa Park) assigned the task of exploring the finance, management and governance issues raised in the *“Soul of San Diego”*, to the BPC. Thus began a lengthy public review process, ensuring that the general public, and all Park stakeholders, would have plenty of opportunity to participate.

The BPC is a citizens’ advisory group with members appointed by the Mayor and confirmed by the City Council. Representatives include members of adjacent neighborhood planning groups (North Park, Uptown, Golden Hill and Downtown), the Balboa Park cultural institutions, the Balboa Park / Morley Field Recreation Council and members-at-large. The BPC serves year-round in an advisory capacity to the San Diego Park and Recreation Board, Mayor and City Council on policy issues relating to the acquisition, development, maintenance and operation of Balboa Park. All meetings are open to the public and include time for public comment.

Beginning with the first public meeting to consider the study on March 8, 2008, and for nine months afterwards, the BPC has been gathering information from the community, interviewing experts in various fields of governance, and acquiring details about the City of San Diego budget and finances, particularly as they apply to Balboa Park.

After months of deliberations on the future financing and governance of Balboa Park, this, the final report of the BPC, includes a complete list of sources consulted, background information, observations and answers to the three questions listed above and recommendations to the Mayor and City Council for next steps.

These next steps will not be easy, but readers can take heart from our past. When the original parkland that is now Balboa Park was dedicated, the population was under 3,500, yet the town leaders created an enduring legacy—a park that was, and still is, larger than Central Park in New York.

When planning for the 1915 Exposition, the population of San Diego was under 35,000. That exposition introduced the beloved Spanish Colonial architecture to the Central Mesa, provided the first animals for our zoo, and brought millions of visitors to San Diego, beginning the expansion that continues today.

In the middle of the Great Depression, in July 1934, San Diego's civic leaders decided to hold a second exposition in Balboa Park, which would add almost all of the buildings now located around Pan American Plaza, the International Cottages, the Old Globe Theatre and Spanish Village. That fair opened less than ten months later, in early May of 1935. Even in times of economic upheaval and duress, monumental things have been accomplished when San Diegans put their hearts and minds to the task.

SECTION**3**

**QUESTION #1:
CAN THE CITY
OF SAN DIEGO
FINANCIALLY
SUPPORT
BALBOA PARK
TODAY AND
INTO THE
FUTURE?**

**I. Introduction**

The BPC had access to only a few resources for the generation and gathering of data beyond public documents and presentations. It has gathered a significant number of documents and sources of additional information for its use, but the information is incomplete. The BPC believes City staff have shown due diligence in their efforts to support the BPC and that the available information is sufficient to answer the above question.

II. Observations

- A. Deferred maintenance, as identified in *“The Soul of San Diego”*¹ is only a partial list of unfunded requirements. Expenses and projects identified in the study include some cost estimates, but, due to its incomplete scope, are not true representations of the “real” unfunded costs for the Park. This is not a problem limited to Balboa Park. Forest Park in St. Louis faced a similar problem; one of the first priorities for its non-profit partner organization, “Forest Park Forever,” was to hire a firm to ascertain the true unfunded costs.
- B. The 2008-09 City budgets were balanced only after cuts to City services, including major budget reductions for the Park and Recreation Department.
- C. Future operating budgets are projected to suffer as a result of local, state and federal budget constraints. Reductions in sales tax, property tax and transient occupancy taxes required mid-year cuts to the Fiscal Year 2009 budget, and will no doubt negatively affect the Fiscal Year 2010 budget. The five-year financial outlook indicates little improvement in the City budget through 2014.²
- D. Balboa Park competes annually with other City park facilities, as well as funding needs and priorities demanded by the public and set by the Mayor and the City Council.
- E. The current budgetary challenges significantly hinder any meaningful progress toward reducing the backlog of deferred maintenance and delayed capital improvement projects in the Park.
- F. Should the fiscal budget trends continue, reductions in the Park and Recreation Department budget should be expected in the future.
- G. There is no identifiable City ‘windfall’ of new, future revenue and no evidence of the civic or political will to increase taxes to support the Park to a greater extent in the future. Some of the sources of revenue currently used for the Park that are likely to remain static or decline, include:
 1. Transient Occupancy Tax (TOT)
 2. Sales Tax
 3. Bonds
 4. Assessments of City of San Diego property owners and businesses
- H. Potential new sources of revenue include:
 1. Increased allocations to Park & Recreation Department from the General Fund
 2. Parking fees
 3. Increased user fees
 4. Charging for Park uses that do not currently have a use fee
 5. Attendance fees
 6. Increasing special event fees and allocating them for Balboa Park
 7. Full-cost recovery, including cumulative impacts from special events and other user fees

8. Developer Impact Fees collected for Park development (including equivalences allowed under the San Diego General Plan)²
 9. Redevelopment funds from Center City Development Corporation for Park projects
 10. Disbursement of funds for Balboa Park from the recent passage of Proposition C, as it relates to City Charter Section 55.2
 11. Support from San Diego County property taxes (given that 45% of Park visitors are San Diego County residents, it is reasonable to suggest support from those residents)^{3,4}
- I. The City generally cannot leverage efficiencies that could reduce operational costs. However, increasing staff productivity and efficiency, and eliminating redundancies are possible ways to decrease costs for the Park.
 - J. Funding needs include:
 1. Operations (staffing for administration and programs)
 2. Maintenance (recurring costs for landscaping and building maintenance)
 3. Repair and replacements (replacing or repairing existing infrastructure or facilities)
 4. Upgrades (making existing facilities better or bringing them into compliance with current standards and codes)
 5. Expansions and improvements (creating new Park areas, facilities or other improvements to increase the user/visitor capacity of the Park)

III. Findings

- A. On the basis of available information, the true amount of unfunded requirements is higher than the costs represented in the “*Soul of San Diego*”.
- B. Staff efficiencies cannot be increased sufficiently to significantly meet the Park’s short-term or long-term budgetary needs.
- C. Competition for further General Fund allocations is intense. Continued reductions in state and federal funding through the City are likely. Accordingly, budgetary shortfalls will likely continue to plague the Park.
- D. The Park might benefit from being run with business efficiency principles. Best practices from other large urban parks could be applied to the Park and may result in some efficiency improvements. But profit motives related to business practices should never be allowed to overshadow the general public benefit of this public resource.

IV. Direct Response to Question 1

Can the City of San Diego provide the necessary financial support for Balboa Park in the future?”

No, the City cannot provide the necessary funding for Balboa Park today, and is not likely to be able to do so in the future. New sources of revenue and a sharing of public and private responsibilities will be required to provide the “necessary support” for Balboa Park in the future.

As a \$3 billion corporation, the City of San Diego has the potential for providing the necessary financial support for Balboa Park. The City, acting alone if it wished, has always had the authority to fully fund and manage Balboa Park. But from a financial and management perspective, the City has never made Balboa Park a high enough priority to fully commit to the funding needed in the Park.

As the competition for finite public financial resources becomes more intense in the future, a look at the past portends that the City will not be able to provide the resources necessary to fulfill its management and operational mandate, to address maintenance, repairs and replacement requirements and to implement approved capital improvement projects for Balboa Park.

The City does not currently act alone with regard to financing Balboa Park, nor is it likely to do so in the future. So, while Question 1 is somewhat flawed, since it implies support from only the City's resources, it can still be answered with a "No".

V. Recommended Actions

- A. As we move towards implementation of new policies regarding the future funding and governance of Balboa Park, a top priority should be further research into several topic areas:
 1. Actual costs of management, operation and maintenance
 2. Projection of future costs of management, operation and maintenance
 3. Actual revenues and funding sources
 4. Projection of future revenues and funding sources
 5. The true condition of Park facilities
 6. Total cost of deferred maintenance
 7. Total cost of bringing facilities and areas up to current standards and codes
 8. Total cost of increasing the capacity of the Park and expanding facilities through capital improvement projects
- B. At the recent kickoff of the Balboa Park 2015 Centennial Celebration, participants talked about the need for a "wow" factor that a world-class park should have. Put another way, participants were saying that "Balboa Park needs to exceed expectations, rather than just meet a baseline condition." Therefore:
 1. Future research and vision-setting needs to answer the question: "Should Balboa Park be restored only to a healthy baseline, or should there be a higher vision?"
 2. If there is a higher expectation, what might that include, and what will be the cost to attain and sustain it?

VI. Supporting Documentation

All the documents listed in the Bibliography: Table of Contents, "Documents Reviewed by the Balboa Park Committee," sections cited below, were used in answering Question 1:

Section II.	Financial Misc.
Section III.	Financial TOT
Section IV.	City of San Diego Budget Documents

VII. End Notes

"Soul of San Diego: Keeping Balboa Park Magnificent in the Second Century", January 2008

1. Appendix 2: Examples of Capital and Maintenance Needs
2. City of San Diego 2010-2014 Five-Year Financial Outlook
4. Summary of Studies, 6
5. Appendix 1: Figure 9, Origin of Visitors, 43
3. City of San Diego General Plan 2008: Recreation Element-Park Standards, RE-17 to E-19
6. Central Park Conservancy, Best Practices, November 2004

SECTION**4****QUESTION #2:**

**EVEN IF THE
CITY OF SAN
DIEGO CAN
FINANCIALLY
SUPPORT
BALBOA PARK
ALONE, SHOULD
IT DO SO?**



Section #4

I. Introduction

The following discussion focuses on the current financial support structure of Balboa Park and offers suggestions for potential revenue sources.

Balboa Park exists today as the result of over 140 years of cooperative partnerships between the City, the general public and the business community. Important accomplishments, events and facilities were the result of citizen initiatives undertaken in partnership with the City. These initiatives resulted in two world expositions, a world-class zoo, and the largest urban-cultural park in the United States. There are numerous recreational facilities, playgrounds, landscaped parkland and vast areas of natural open space that are all a legacy of public and corporate volunteerism.

While the City of San Diego has assumed and discharged its role as the manager of Balboa Park, the City has never acted alone in building, operating, supporting, preserving or enhancing Balboa Park and its facilities. Over its history, a myriad of individuals and organizations from the private sector, as well as governmental bodies other than the City of San Diego, have contributed millions of dollars and millions of volunteer hours to support Balboa Park.

II. Observations

The City of San Diego does not currently operate Balboa Park on its own. Numerous organizations and institutions provide funding, programming and operational support. Although the City currently provides the majority of the funding for the operation and maintenance of Balboa Park, it does receive support from other sources.

- A. The City maintains contractual agreements with many Balboa Park cultural institutions and other non-profit organizations. The relationship between most cultural or recreational institutions in the Park and the City of San Diego is symbiotic. These organizations are able to lease a facility for little or no rent, while the City receives the benefit of having the kinds of cultural, educational, science and recreational institutions that would be expected in a major city. Most of these non-profit entities provide services far beyond what is required in their leases with the City. Typical programs and/or services these organizations and institutions provide:
1. Research programs
 2. Balboa Park Visitor Center
 3. Balboa Park Web site
 4. Balboa Park "e-newsletter"
 5. Security services
 6. Free education programs for schools
 7. Exhibits, lectures, performances and other educational programs for the general public
 8. Maintenance of facilities within leaseholds
 9. Improvements to areas adjacent to leaseholds
 10. Additions or improvements made to many of these City-owned facilities with the help of private funds
 11. Stewardship of the cultural and natural heritage of our City and region
 12. Installation of "green technologies"

If the City had to fund these additional programs, the cost to operate the Park would be significantly higher than it is now. For instance, the combined annual operating budgets of the institutional members of the Balboa Park Cultural Partnership (BPCP) total approximately \$300 million. And in the last ten years, the members of BPCP have invested approximately \$190 million in capital improvements in the Park. These are costs the City does not bear. A complete analysis of the total economic and fiscal benefits the Balboa Park institutions provide to the City has never been done, so the full value of the institutions is not known.

- B. Recreation organizations and activities provide funding, services and programming support for recreational activities in Balboa Park. For example, the Balboa Park / Morley Field Recreation Council, a volunteer organization, provides funds for the maintenance of some of the Park's recreational facilities. These funds tend to be limited to playing fields, swimming pool, tennis courts, and gymnasiums. However, this funding is insufficient to meet the aggregate financial operating and maintenance needs of sports and recreation facilities in the Park.
- C. Sport and recreation user fees do not cover the true cost of the activity. Whether these activities should be subject to "full-cost recovery including cumulative impacts," requires further discussion and analysis.
- D. Horticultural organizations provide funding and volunteer hours caring for Park gardens that would otherwise be the responsibility of Park maintenance personnel.
- E. Philanthropic support includes funding for capital projects and programs, in-kind donations, and volunteer activity by individuals as well as organizations.
- F. Philanthropic organizations and individuals determine the projects they want to fund. Projects are often funded in a piecemeal way and may not match Park-wide priorities or the needs of the general public. Donations to the Park by these organizations or individuals are typically project-specific and cannot be used to fund operations or maintenance.
- G. Private corporations often provide volunteers, and in-kind and financial donations. For example, SDG&E underwrote the replacement of lights on the Cabrillo Bridge, and it is contributing expertise and funding to make City-owned buildings in the Park more energy efficient.
- H. San Diego County, the State of California and the Federal Government currently provide only indirect support for Balboa Park. "*The Soul of San Diego*" demonstrates that County residents are major and regular users of Balboa Park. These residents represent 48 % of Park users, visiting an average of 5.8 times per year.^{1,2} However, the County has contributed only modestly to the financial support of Balboa Park. Apparently, discussions with the County have not taken place, even though it is the most obvious entity with significant potential for assistance with funding and management.
- I. The State of California could provide bond proceeds or grants or legislatively create a "Park and Recreation District." Today's financial crisis makes this unlikely, but further study is warranted once the State's financial situation has improved.

- J. Potential sources of revenue or volunteer support that warrant further analysis include:
 - 1. Park concessions should be analyzed to determine whether they offer the right mix and locations to satisfy visitor needs and optimize revenues.³
 - 2. User fees for special events in the Park should be analyzed for possible increases.
 - 3. When a for-profit entity holds a special event in the Park and makes a donation to a non-profit entity, that entity should be a Balboa Park-dedicated organization.
 - 4. All institutions with leaseholds, as well as other non-profit organizations now operating within the Park, are a potential source of revenue for Park-wide improvements. All equitable approaches to revenue enhancement from these sources should be explored—so long as the funds generated are applied directly to Balboa Park needs.
- K. Dozens of “Friends of Canyons” groups have been formed around San Diego in the last ten years to assist the City and County in maintaining the region’s urban canyons. A “Balboa Park Canyon Friends” organization has yet to be created. Such a group could augment Park and Recreation staff by contributing many volunteer hours for restoration and enhancement of natural resources in the Park.⁴
- L. Some parts of the Park are underutilized or vacant. It is unclear whether this is a management, financial or political problem.

III. Findings

- A. Although the organizations and institutions mentioned above provide some funds and are a rich source of cultural and recreational programming, they cannot fully meet the Park’s programming and infrastructure needs.
- B. “Passive”, or unstructured, use of Balboa Park has been undervalued, and, since there is no obvious lobbying group to protect this resource, the push to increase revenues will place what is left of open recreational areas at risk.
- C. Balboa Park is a regional asset and seeking financial support from the County of San Diego seems an obvious option to pursue. A Joint Powers Agreement between the City and County of San Diego may not be feasible at this time due to financial and political impediments. However, the County Board of Supervisors’ participation in funding and managing the Park is strongly encouraged. The County should be welcomed into any further discussions as to the future of Balboa Park in terms of both funding and management.
- D. Efforts should be made to find a way to simplify, make more efficient, and optimize fund-raising efforts for the Park (see Question 3, Section II D).
- E. The search for increased funding for Balboa Park should not overshadow the mandate to provide “free and open parklands”. A process must be put into place to protect and enhance this precious resource and make sure that the “Park” always remains a park.⁵

IV. Direct Response to Question 2

Even if the City of San Diego can financially support Balboa Park alone, should it do so?

- A. The City of San Diego should not act alone in financing and operating Balboa Park.
- B. As stated in the Balboa Park Land Use, Parking and Circulation Study “The Park’s challenge today is balance: balancing all of the many facets that are Balboa Park, and merging them into the unique place that has served the City of San Diego for over a century”.⁶
- C. In addition, there must be a balance between current critical financial needs and the need to maintain what the public loves about Balboa Park. It is clear that what makes the Park complex and challenging is also what makes it magical.

V. Recommended Actions

- A. The City should build on its current and numerous partnerships to:^{7, 8}
 - 1. Build trust with existing partners.
 - 2. Identify new partnerships.
 - 3. Increase private donations.
 - 4. Create new sources of revenue.
 - 5. Ensure donations for projects and services match the priorities of the Park.
 - 6. Provide better planning for Balboa Park, taking into consideration the needs of the adjacent neighborhoods and the region. This should include a discussion of the “limits to growth” for the Park.
- B. An analysis should be conducted to determine whether current Park area uses are still relevant, and if not, whether they can be changed to benefit the Park as a whole. These changes could provide enhanced opportunities for use by the public and new sources of revenue.

VI. End Notes

“Soul of San Diego, Keeping Balboa Park Magnificent in the Second Century”, January 2008, Appendix 1

- 1. Summary of Studies, 6–7
- 2. Figure 9, Origin of Visitors, 43

Balboa Park Land Use, Circulation and Parking Study: Implementation Strategies, November 4, 2004

- 3. L15, enhance food service and other concession services
- 6. Introduction, 8
- 7. Principle Six: Distribute Costs and Benefits Fairly, 23
- 8. Implementation Strategies, 96-100

- 4. San Diego Civic Solutions, Canyonlands: The Creation of a San Diego Regional Canyonlands Park: A White Paper, March 15, 2006
- 5. Balboa Park Master Plan, 7

SECTION**5**

**QUESTION #3:
IF THE CITY
WISHES TO
EXPAND
MANAGEMENT &
GOVERNANCE
OF BALBOA
PARK, WHAT
ARE THE ALTER-
NATIVES FOR
IT TO DO SO?**

**I. Introduction**

The Park and Recreation Department does an admirable job of managing Balboa Park, especially considering the deep cuts made by the City of San Diego in recent years that have led to diminished resources and ever-expanding responsibilities. However, after examining issues relating to Balboa Park revealed during these public hearings, as well as considering the strengths of other urban parks that have been studied, the BPC has concluded there are a number of areas which could be optimized and improved in the Park's administration.

II. Observations**A. City Organization**

1. There is no dedicated management oversight for Balboa Park.
 - a. The Deputy Director for Developed Regional Parks, in addition to Balboa Park management, has responsibility for numerous other sites and, therefore, is not solely dedicated to Balboa Park. The duties of the position include large, complex areas such as Mission Bay Park and Presidio Hill, as well as citywide park maintenance.¹
 - b. With this level of responsibility, it is difficult for Park staff to concentrate on anything other than immediate needs and funding issues. This forces staff into a reactive mode without time for proactive planning and execution of projects.
 - c. While the Park and Recreation Department has the primary oversight for the Park, several other City departments are also tasked with a variety of responsibilities and functions in the Park.
2. There is no library of critical Park documents that are easily accessible to the public, nor is there a comprehensive list of critical Park documents anywhere within the City. A library of these documents would, at a minimum, include land use documents, planning reports, leases and special event applications.
3. Park planning and project processing, approval and monitoring need improvement and streamlining:
 - a. Park planning is spread over two departments: the Park and Recreation Department and City Planning and Community Investment Department. There is no single source of contact.
 - b. Four different departments monitor or review projects within Balboa Park. This includes the departments mentioned above, along with Engineering and Capital Projects and Development Services.
 - c. The planning and approval process is unclear, undocumented and not posted on the City's Web site, unlike the Development Services Department, whose general processes for projects are well defined. It is frustrating for the public, leaseholders and organizations to obtain reliable information on how the process works.
 - d. There is currently no process for the updating of Park-related land use documents, despite the fact the Master Plan for the Park calls for updating them on a five-year cycle ². There are elements in the existing plans that are clearly outdated or no longer appropriate, with no prospect for being reviewed.
 - e. Policies and processes need to be defined that determines the limits to building expansion (vertically and horizontally) in the Park.

- f. No policy or process exists to protect our green spaces and urban forest resource. A “no net loss” policy that protects tree canopy, passive native habitats, active open space areas and public realm areas should be pursued. As an example, Forest Park in St. Louis has a defined commitment that if greenbelt is removed from the Park, it must be replaced somewhere else with in the Park.
4. Successful project implementation and management should be a defined, driving force for the projects that are still viable and identified in adopted land use documents.
5. Staff commitment to implementation of an identified project is sometimes lacking, possibly because there is a lack of staff and funds. Because no one is willing or able to play the role of “project champion,” projects remain unrealized or end up heavily modified, come in over budget, or are only partially completed.
6. Because no one person or group is identified to “work the problem,” the current process relies on finding staff to reactively “fix the problem”.

B. Decision-Making Process

1. Decisions affecting Balboa Park are often influenced by larger political forces in the City, or by whatever is currently “politically correct”. Political interests concerned with maintaining the “status quo” often stifle creative thinking and discourage and constrain boldness and innovation.
 - a. A specific “Park-centric” focus is needed for routine and long-term management decision-making.
 - b. There is not adequate commitment to the historic preservation of the Park, or anyone with the clout to say “no” to proposed new projects that do not meet the Secretary of Interior Standards for Historic Places, Structures and Districts.³
 - c. No one has the time or the political immunity to review and create expectations of attendance and activities for existing institutions.
2. The general public has little or no voice in decision-making for day-to-day Park and Recreation activities.
3. Park leases are inconsistent in ways that are confusing and inequitable. Further, these leases are managed by the City of San Diego’s Real Estate Assets Department with little input from the public or Balboa Park administration. The lack of routine and on-going communication between the staff of Park and Recreation and Real Estate Assets, while improved over the last two years, still causes problems for the institutions and other Park tenants as well as Park staff.

4. Specific policies and processes are in need of development, review and enhancement, taking into account the unique nature of Balboa Park. Some of the missing management policies include:
 - a. A clear public art policy and a process that enables artists to propose and display their work in a timely way to interact with the public or leverage current Park-related events.
 - b. A naming rights policy specific and clear to donors that balances the need for fundraising and recognition with the public ownership of the Park.
 - c. A strategy or process to optimize concessions in the Park. An analysis should be done as this could increase Park revenues and enhance the Park visitor experience.⁴
 - d. A “green” strategy for the Park. While there is some work being done, it is not well organized, which limits the vast opportunities for participation.
 - e. A safety plan and policies for the Park. When a project is identified, there is often no follow-up on its implementation.
5. Institutions are a critical part of the Park organization structure. Careful consideration should be given to the needs of current and future institutions. Important institutional issues include:
 - a. Relationships between Park management and the existing institutions should continue to be enhanced and improved with a constant, open dialogue.
 - b. When making decisions on new or modified leases, current public trends, interests and needs should be considered.
6. Relationships between Park management and communities adjacent to the Park, while improved over the last few years, could still be enhanced.⁵
 - a. More analysis of community needs and interaction with the Park is needed and could benefit both.
 - b. There is no connection between the Park and community-based volunteer groups, such as the Friends of Canyons organization, which could benefit the Park.
 - c. The relationship between Park management and Balboa Naval Hospital, while cordial, could be improved, potentially leading to benefits for both.

C. Operations

1. In an attempt to have the Park look and function well, the City staff has done such a good job of hiding the true condition of the Park that the public does not think there are any significant problems. This has unintended consequences. Due to dedicated Park staff’s passion, the exact condition and needs of the Park are not obvious or easily understood. The general public, our political representatives and decision makers need to be educated on the shortfalls and needs of the Park.
2. At this time, a comprehensive report of the condition of the Park does not exist. An annual “Needs Assessment” update of the condition of the Park should be performed. This is done in other major urban parks around the country. The assessment should address not only operations, management and maintenance costs as well as repair, protection and replacement costs, but also preservation, enhancement and expansion related to the implementation of adopted Park plans.

3. An Annual “Operations Action Plan” should also be presented and made available to the public. The plan should include reasonable goals and projects that can be funded and completed during that year.
4. An annual “Project Status Plan” that shows the current status of all projects called for in adopted plans and studies should also be prepared.
5. No formal Balboa Park volunteer program exists for the public areas of the Park.
 - a. A “Volunteer Coordination Plan” should be created and actively managed.
 - b. Volunteer utilization should be effectively increased to the advantage of the Park.
 - c. Potential volunteers require supervision, assignment of job duties, evaluation and management oversight.
6. Due to limited staff resources parking and traffic cannot be adequately managed. Although the Balboa Park Land Use, Circulation and Parking Study, recommends hiring a “Transportation Officer” to identify and implement programs that will mitigate problems in these areas, this position has never been funded.⁶
7. Balboa Park does not do an adequate job of providing information and services to visitors who do not speak English. “*The Soul of San Diego*,” documents the significant number of visitors to the Park who preferred to take a survey in Spanish.⁷
8. Balboa Park is not receiving suitable attention in some specific areas that would be expected, or practiced in other “Great Parks”.
 - a. There is no cohesive group focusing on the planning, funding and implementation of public art.
 - b. There is no organized process to create and recruit special events for the general public that are free, and do not benefit any one issue or organization.
9. Development, both physical and cultural, tends to be in a limited area within the Park while other areas continue to be used for inappropriate activities or not used at all.
10. The City of San Diego’s Balboa Park Web site is underdeveloped (lacking basic and updated information; unlike comparable City Planning and Community Investment sites) and therefore underutilized.
11. While Park and Recreation staff is very active in managing the landscape assets in the Park, there could be further optimization, organization and management of the horticultural resources in the Park.
12. Urban reforestation plan and implementation programs are needed since the Park tree canopy, diversity and health of the urban forest have been in a state of decline for many years.
13. Horticultural resources should be considered part of the historic resources of the Park and integral components of the historic landscape in the Central Mesa Area.
14. As the population around the Park increases, the need for “open space” will become increasingly valuable as it provides “breathing room” to our “paved and urbanized environment” and assists in the filtering of urban water runoff, which is also increasing.⁸
15. Accurate Park attendance and facility usage figures are not kept, and a better monitoring program of Park use is needed.⁹ Traffic counts, parking counts, Park visitor attendance and revenues should all be tracked on an ongoing basis. This is important to understand user and park infrastructure needs and is considered a best practice for major urban parks.

16. Due to a consistent lack of adequate staffing levels, management oversight of applicants using the Park for special events and other uses is a cause for concern. The lack of follow-through to ensure that applicant actually complied with the requirements of their contractual arrangements is troubling and could result in long-term damage to Park assets without anyone being accountable. This function should be handled by a dedicated contract administrator, a position which is not currently funded.
17. There is likely duplication among the various City departments that provide services to the Park. Without more detailed analysis, this supposition cannot be substantiated or disproved.

D. Finance

1. The Park is understaffed and trends are for more cutbacks, at least in the short run.
2. There is no financial plan for long-term Park sustainability; therefore, the Park is subject to the economic variability that the City also endures. This lack of a financial plan also precludes “grand” planning for future projects and development, shifting the attention to immediate needs and maintenance.
3. Giving by private entities to the Park is often not optimized and the use of funds is not transparent.
 - a. A perception that dollars given to the City end up in the General Fund rather than spent on the Park discourages private donations.
 - b. There is a misconception that a donor cannot earmark a donation for a specific project or process.
 - c. It is believed that donors will give to the Park if they are assured their money is being spent for the intended purpose -- as many currently do with donations to Park institutions. There is no belief this will be true when giving money to the City.
 - d. It is a common problem among non-profit organizations for donations to be earmarked only for specific projects, leaving little funding for operations.
 - i. Presently Balboa Park also receives little or no public funding in this category.
 - ii. With a credible education and outreach program to the public, donors may be willing to contribute to a “Balboa Park Fund” as long as they have iron-clad assurances that their donations would be used solely to support Balboa Park.
 - e. The City has no public process/overview for reporting on how funds donated to Balboa Park are used. This lack of transparency hinders individual donors and philanthropic organizations who want to be sure their funds are wisely spent.
 - f. There is a history of some philanthropic organizations in the Park taking singular credit for what was accomplished from multiple funding sources, both public and private.
 - g. Park staff is not charged with assuring that proper acknowledgment be provided to all contributors, including the City itself. The City may, for example, have donated actual dollars or approved a bond issuance and incurred the resulting costs associated with the indebtedness. It is important that proper credit be attributed for several reasons, including:

- i. The impression this creates in the public's mind is that Balboa Park already receives large amounts of private funds, which is certainly not the case. In fact, most of the donations reported in the media are almost always made to the institutions located in the Park, but not to the Park itself.
 - ii. Most City departments require that the City receive credit on all public documents when they contribute dollars or provide in-kind donations of materials and staff. It is not clear whether this happens in Balboa Park due to a lack of policy direction or of manpower to assume this duty. It is also possible that City staff and high-level decision makers fear alienating some donors.
 - iii. The private sector is not solicited in any meaningful or consistent manner for additional funds to support the Park.
 - iv. The unintended consequence is that donors and the general public think there is no need to implement a program that would bring significant funds to the Park.
4. There is currently no clear process for making donations directly to the Park.
5. There is duplication of effort by non-profit organizations in the Park.
6. Long-term consistency provided by dedicated and accountable staff, trained to work with donors, would optimize and increase funding levels for the Park.
 - a. While every donor is important, this is critical for very large donors.
 - b. Hiring a "Resource Development Officer" was recommended in the Balboa Park Land Use, Circulation and Parking Study to perform this function, but to date the position has not been funded.⁶ This individual will ideally have a background and successful experience working with donors, including individual, corporate, and private trusts, as well as the media.
7. There is no annual statement of how much private funding comes to the Park.
8. Currently project-based donations are handled on a case-by-case basis. No formal management structure or process exists to administer and provide oversight to philanthropic organizations providing funding and services for public areas of the Park.
 - a. The process for choosing projects, especially major projects, regardless of the funding source, could be further optimized.
 - b. Identifying candidate projects has improved in the last year with Park and Recreation staff creating a priority list for some projects. While this is a step in the right direction, there is a need to refine and expand the process.
9. There is no annual analysis or implementation of full cost recovery for special events in Balboa Park, and criteria currently used do not include cost of cumulative impacts.

III. Other Management Models

A. Model Definitions and Implications for Balboa Park

1. Joint Powers Agreement
 - a. A Joint Powers agreement is an agreement between or among two or more independent public entities, that consent to perform certain functions and/or take certain actions to reach one or more agreed upon goals. No power or authority is given up by any of the contracting parties, nor is any additional governing authority set up under this type of agreement.
 - b. The needs of Balboa Park cannot be met with this management model since it does not raise funds or perform management functions.
2. Joint Powers Authority (JPA)
 - a. A Joint Powers Authority is a legal entity formed by agreement between or among two or more public entities that creates an independent governing authority with specified powers to perform certain functions to achieve specific goals.
 - b. This is not a priority for the Board Supervisors at this time, and would require a substantial monetary commitment for consideration of a JPA for the Park. Supervisor Roberts has said he will remain open to this concept, if money becomes available and other more pressing issues, like the regional fire agency, are resolved.
3. Park and Recreation District by Legislation
 - a. A “Park and Recreation District” is an independent entity with its own governing board, which is created by an act of the California State legislature designating a defined geographic open space or park and recreation area. The legislation usually brings state funding with enactment.
 - b. One state legislator has expressed interest in sponsoring legislation to create a Park and Recreation District if that is the direction the City pursues. However, given the current budget constraints at the state level, it is unlikely that any state funding would come with the creation of the District.
4. Park and Recreation District by Vote of Affected Property Owners
 - a. A Park and Recreation District by vote of affected property owners is an independent entity with its own appointed or elected directors. Its funding – a special property tax surcharge – would require the approval of a majority of affected property owners, which is often difficult to achieve.^{10, 11}
 - b. No political will currently exists to persuade affected property owners to create a new District until the City resolves its financial challenges.
5. Public/Private Partnership
 - a. A Public/Private Partnership is a contractual agreement between a public agency (federal, state or local) and a private-sector entity that is drafted to insure that specific public concerns are addressed and that restrictions are placed on the private partner to be sure that the public interest is served and protected.¹²
 - b. This model is currently being used in Balboa Park. Numerous contracts already exist between the City and institutions and organizations to manage, program and operate City-owned structures and lands. This model has been used successfully in the Park for over half a century.¹³
 - c. Private non-profit entities are not bound by the Brown Act. However, provisions can and should be included in contracts between the parties related to the Park that they will abide by the Brown Act.

d. This model is easiest to change over time; parties involved are not unduly constrained by external legal requirements. A contract can be easily modified to respond to changing needs or requirements in a straightforward manner.

(Redevelopment as a governance model was never under consideration, but there was a request to look at the Great Park in Irvine, CA, which is a redevelopment area.)

B. Findings

1. Regardless of the model chosen, the City needs to encourage the public to take more ownership of the care and funding of the Park as in other cities. The citizens of San Diego have tended to “let the City handle it.” As a consequence, the public is unaware of the condition of the Park, or of how the Park is funded, managed and governed.
2. Most appointees to the governing boards of JPAs and Park and Recreation Districts are legislators or appointed by specified defined legislators. For example, the Governor of California makes appointments to the Board of the San Diego River Conservancy (Park and Recreation District). Very few members of the general public have a voice on these Boards. This can lead to a limited understanding of the needs of the public resources and the public.
3. JPAs and Park and Recreation Districts, in addition to their governing boards, need to have separate Citizens’ Advisory Committees, and/or fundraising entities.
4. All governance models except the Public/Private Partnership would lock management of the Park into whatever is written into the organizational founding documents, legislation or ballot language. To change them would require going back to the public process that created them in the first place.
5. If the City works with a public benefit non-profit entity via a contractual agreement, policies and practices can be changed or modified fairly easily in comparison to other models. There is much more operational flexibility with this kind of arrangement.¹⁴
6. The experiences of other great urban parks studied shows fundraising went up significantly, often in addition to other fundraising efforts by individual institutions in those parks.
7. The three foundations which funded “*The Soul of San Diego*”, all believe the fundraising potential is here in San Diego and the region, and that the funding of the institutions and the Park itself are not mutually exclusive.¹⁵
8. Since all JPAs and Park and Recreation Districts require a Citizen Action Committee and/or a 501(c)(3), and are fairly onerous to create, it seems best to start with the least complicated and most flexible option.
9. Starting with the creation of a City/Public/Business/Community Partnership, does not in any way preclude creating a JPA or Park and Recreation District at a later time.
10. As stated by the Keston Institute in “*The Soul of San Diego*,” without resolving the underlying management and governance issues identified in Balboa Park, any attempt to raise funds will fail...”¹⁶

IV. Direct Response to Question 3.

If the City wishes to expand management and governance of Balboa Park, what are the alternatives to do so?

- A. The City should retain ultimate authority over the Park, including Park policies and land-use decisions. Further, the City should assure the public that Balboa Park will remain a public park in perpetuity and that privatization will never be allowed.
- B. The City of San Diego should provide “Maintenance of Effort” funding, at a minimum, that is equal to its highest historical level of funding adjusted for inflation.¹⁷
- C. The current fund-raising capabilities, management and governance structures for Balboa Park are inadequate.
- D. Fundraising, management and governance should be expanded through the creation of a new, public benefit non-profit entity. There are many options for creating and implementing such an entity. The BPC makes the following recommendations:
 1. The new entity should start with the addition of management functions that do not exist within the current management structure of Balboa Park.
 2. Prior to changing management or governance, existing Park and Recreation and other City functions in the Park must be further clarified.
 3. A contractually-defined agreement should specify the partnership roles and restrictions between the City of San Diego and the new entity, to insure the public interest is served and protected.
 4. As the new organization expands and focuses solely on the management, governance and fundraising for Balboa Park, it should be supported and protected from undue political influences.
 5. The new entity must respect the existing values that the public places on established land use, historic and environmental Park resources. It should take a leadership role in developing policy and a process that further clarifies community values, taking into account the unique nature of Balboa Park. This entity will value all donations, including, but not limited to, in-kind, time and money.
 6. The Board of Directors of the entity should not serve as representatives of any one constituency, but rather serve for the equitable, collective benefit of all of Balboa Park.
 7. Regularly scheduled audits of the entity should be conducted no less than once a year. An “Annual Report” with financial data along with the audit will be made public. Legally required financial reporting documents must be made easily accessible to all interested parties.
 8. This new entity should follow steps that have worked successfully at similar great urban parks studied, augmented by a process that is unique to San Diego and Balboa Park.

9. The Public/Private Partnership, which the BPC recommends, should grow in response to community and Park needs--a process that has proven to be successful in other major city parks. Successful partnerships which were studied, between cities, the public and the business community, all followed this model successfully.
 - a. Before adding other management responsibilities to the new entity, assigning management functions that do not currently exist within the administrative structure of Balboa Park should be considered first.
 - b. If Balboa Park management is changed or expanded, additional responsibility should be assigned incrementally as success is demonstrated. By increasing responsibility in this way, if the new entity fails, the impact on City staff would have relatively limited adverse consequences.
 - c. Additional management responsibility should only be added as needed to carry out agreed-upon work plans for the Park, and in direct proportion to funds raised for the functions.

10. The BPC recommends the following initial tasks for the new entity:
 - a. Authorize reports and studies, including:
 - i. A comprehensive "conditions report" for Balboa Park.
 - ii. A reporting of actual funds coming into the Park for management, operations and capital improvement projects.
 - iii. A study to ascertain the real cost to manage and operate the Park.
 - b. Engage the public in a review, and, if necessary, an update to "Balboa Park's Land Use Documents". This would include a "Precise Plan for the West Mesa".
 - c. Create a financing plan.
 - d. Create a priority list of projects for the Park. This process would not preclude donations for specific projects not currently identified in this or future priority lists.
 - e. Develop a "Resource Management Program" to manage fundraising and volunteers who want to donate their time to Park projects and activities.⁶

V. Recommended Actions

It was beyond the scope of work for the BPC to specify particulars for the new entity. How the BPC's recommendations are to be executed should be the focus of a second phase of study conducted by a specially-appointed Balboa Park Task Force. Suggestions for formation of this Task Force are set forth in the next section of this report. Issues that will need to be investigated further by the Task Force include, but are not limited to:

1. How to resolve the fact that skill sets needed for fundraising are different than those required for management and governance.
2. Setting priorities is for initial and subsequent tasks.
3. How to ensure that a cross section of the general public, representing the diversity of the region, and Park stakeholders is included in the new organization.

VI. Supporting Documentation

All the documents listed in the Bibliography: Table of Contents, Documents Reviewed by the Balboa Park Committee, sections below, were used in answering Question 3.

Section V	Governance &/or Funding Models for Parks Outside San Diego
Section VI	Parks in the San Diego Regions: Conservancies, Foundations, Citizen Advisory Committees Joint Powers Authorities or Joint Powers Agreement
Section IX	Organizational Structure

VII. End Notes

1. Organizational Structure #10, Park & Recreation Chart

Balboa Park Master Plan

2. Plan Amendments, 11
3. Historic Preservation, 10
5. Neighboring Communities, 11
16. Maintenance of Effort, 11

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12. Public Private Partnership, 8
16. Conclusion, 12
13. Balboa Park Cultural Partnership
 - a. Member Profiles
 - b. Current Balboa Park Leases: Recognized Cultural Contributions
15. Philanthropy & Balboa Park Speech by Peter Ellsworth, President, Legler Benbough Foundation to Balboa Park Committee Meeting August 21, 2008
14. BPC June 5, 2008 discussion with Dorothy Leonard and Craig Adams

SECTION**6****NEXT STEPS:
RECOMMENDATIONS FOR
SETTING UP A
“SECOND PHASE”
PROCESS**

The Mayor and Council of the City of San Diego should support a second phase of study needed for changing the management and governance of Balboa Park. This would then lead to the actual implementation phase.

The following are recommendations for the “Second Phase.”

1. **Purpose:** to further refine recommendations adopted by the BPC to create a new public benefit non-profit entity for fund-raising, management and governance of the Park, and to broaden public participation in the discussion and decision-making process.
2. **Open-transparent** public process, which must:
 - a. Follow the requirements of the Brown Act.
 - b. Establish a coordinated public outreach and education program.
 - c. Solicit and encourage broad public participation and comment.
3. **“Second Phase” working-group membership: a “Balboa Park Task Force”**
 - a. Task Force should be limited to a manageable number of members, - more than 11 but less than 20. This recommendation is based on the size of typical City of San Diego advisory committees.
 - b. Task Force should consist of a cross-section of stakeholders from inside and outside the Park.
 - c. Task Force should include individuals with expertise in a variety of subject areas specific to the task.
 - d. Task Force should include individuals outside the geographic areas already represented by the Community Planning Committee members currently on the Balboa Park Committee.
 - e. Among the areas of experience, representation or expertise, that should be considered for appointment to the Task Force, are individuals with the following experience or basis for representation:
 - i. Balboa Park Committee – current or prior member
 - ii. Balboa Park Cultural Partnership – current or prior institution trustee or executive director
 - iii. Recreation or Recreation Council experience
 - iv. Fund-raising experience
 - v. Public land-use advocate
 - vi. Public parkland advocate
 - vii. Experience as current or prior Park lessee or user-group member
 - viii. Philanthropic experience
 - ix. Experience creating and/or running a non-profit
 - x. Business or agency management experience
 - xi. Financial management experience
 - xii. Tourism management experience
 - xiii. Legal experience
 - xiv. Mayoral appointee
 - xv. District Three Councilmember appointee
 - xvi. Fourth District Board of Supervisor appointee
 - xvii. City Staff at a decision-making level (preferably the Director of Park and Recreation Department) – should be a voting member



4. Staff support needed

- a. Since the first phase of the Study was conducted by an existing committee, the need for staff assistance was minimal; this will not be true for the second phase.
- b. This Task Force will be made up of people who have not worked together, and who will have a variety of backgrounds and experiences as they relate to Balboa Park and the City of San Diego. In order to successfully conclude the second phase in a timely manner, **the Task Force will need:**
 - i. A facilitator
 - ii. A support person to staff the committee, take notes, keep the public record and make sure the public is noticed and engaged.

5. A new page will need to be set up on the City of San Diego Web site to include, but not be limited to, the following content:

- a. Agendas
- b. Minutes
- c. Documents reviewed by the Task Force
- d. Documents created by the Task Force
- e. Pertinent documents from the first phase of study
- f. Link(s) to Balboa Park Study Web page(s)
- g. Public education and outreach

6. It is highly recommended that before any changes are made to governance and management, existing Park and Recreation Department and other City functions, processes and procedures used in Balboa Park, be further clarified.

SECTION**7****BIBLIOGRAPHY:
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COMMITTEE****I. Foundation Funded Study Documents**

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