

TERMS AND CONDITIONS FOR CITY COUNCIL RECOGNITION OF  
**OTAY MESA PLANNING GROUP**  
AS AN INDEPENDENT COMMUNITY PLANNING GROUP  
PER CITY COUNCIL POLICY 600-24

**Introduction and Background**

With the Terms and Conditions established herein, the City desires to establish minimum standards the Otay Mesa Planning Group (the CPG) will adhere to and designated services the CPG will provide in order to obtain and maintain official recognition by the City pursuant to Council Policy 600-24 (Policy 600-24). CPGs are independent organizations voluntarily created and operated by community members who are not City employees, City agents, or City representatives. CPGs are not City-controlled or managed organizations. The City does not direct or recommend the election, appointment, or removal of CPG voting members, or delegate authority to CPGs to act on its behalf.

The CPG, in adopting these Terms and Conditions, commits to meeting these minimum standards and to operating in a manner that abides by and conforms with the Brown Act, is transparent to the public, is accessible to and inclusive of all community members, and reflects the diversity of the communities where they operate. The CPG acknowledges that meeting the standards of this document is necessary to be formally recognized, and continue to be recognized, by the City Council (Council) as a CPG in the City of San Diego. The CPG acknowledges that the City can revoke recognition of any CPG if the City, in its sole discretion, determines these standards are not being met.

The CPG will separately and independently maintain any legally required corporate documents, including articles of incorporation and corporate bylaws, or any other legally required documents related to the CPG's founding, operation, or organization.

The CPG will submit the documents listed in Exhibit A of these Terms and Conditions with its application for Council recognition and maintain these documents in accordance with sections 2.5 and 7.2 herein.

In consideration of Policy 600-24 and the Terms and Conditions established herein, the CPG hereby agrees to abide by the following:

**1. Name and Geographical Boundaries**

The name of this City recognized CPG shall be Otay Mesa Planning Group.

The community planning boundaries of this CPG are the boundaries of the Otay Mesa Community, as shown in Exhibit B.

## **2. Responsibilities**

### 2.1 Collaboration with City Staff

As a recognized independent body, the CPG may work with City staff throughout the City's planning process when requested by the City, including during the formation of long-range community goals, objectives, and proposals or revisions for inclusion in a General or Community Plan.

### 2.2 Advisory CPG Review

The CPG may make advisory recommendations to the City and other governmental agencies on land use matters within the CPG's geographical boundaries or related matters associated with implementation of its community plan as shown in Exhibit B, including the preparation of, adoption of, implementation of, or amendment to, the General Plan or a land use plan when a plan relates to its boundaries.

The CPG may, upon City request, make recommendations, or participate in, additional efforts such as identifying CIP infrastructure needs or additional City matters.

The CPG recognizes that City staff and development project applicants are not required by the City to present their project or application before the CPG although the City encourages applicants to conduct robust engagement with all CPGs, the community, and project neighbors.

### 2.3 Timely Submittal of CPG Recommendations to the City

In order to be considered as part of the City's development review process, CPG project review recommendations, if any, must be submitted to the City within seven calendar days of the CPG taking action.

In addition, the CPG shall submit its recommendation and any conditions to the project proposed by the CPG, using Bulletin 620 Distribution Form, or reasonable facsimile.

The CPG will follow a uniform mandatory process for recording CPG project review recommendations through the use of an annual report that includes all project recommendations which shall be part of the CPG's official records.

### 2.4 Adherence to Ralph M. Brown Act

The CPG must comply with California's Open Meeting Law, the Ralph M. Brown Act, set forth at California Government Code sections 54950 through 54963 (Brown Act), by conducting meetings that are open to the public, properly noticed, and in compliance with each of the Brown Act provisions. Failure of the CPG to conduct meetings in compliance with the Brown Act provisions shall constitute sufficient reason for the CPG to lose its Council recognition and may subject the CPG and CPG voting members to a loss of indemnification by the City.

### 2.5 Maintenance of Open Records

The CPG shall maintain its official records, including its rosters, annual reports, meeting agendas, applications to serve as voting members, evidence of completion of annual trainings,

and meeting minutes, for a minimum of five years (either on its website, in electronic files, or in hard copies) from the date each record is created, and will make all official records available to the City and to any member of the public upon request.

Written applications submitted to the CPG by individuals wishing to serve as voting members, and records of election results, are considered official records and will be maintained by the CPG in accordance with Policy 600-24. The CPG will submit to the City the rosters of CPG voting members by May 1<sup>st</sup> of each year and will also submit to the City any changes to rosters as a result of CPG elections.

#### 2.6 Independent Entity

The CPG is an independent entity from the City and must be able to operate as such. The City may provide assistance to CPGs at the discretion of the City Manager and subject to the availability of City resources. In addition, CPGs may be allocated funds by the City when such funding is approved by the City Council.

### **3. Community Participation and Representation**

#### 3.1 Membership

The CPG will ensure that voting members of recognized CPGs, to the greatest extent possible, represent the entire community and community interests, including homeowners, renters, individuals with and without school age children, and diverse age groups.

The CPG and its voting members should routinely seek robust community participation in the CPG planning and implementation process to serve the best long-term interest of the community at large. The CPG shall submit a detailed written Community Participation and Representation Plan to the City Council along with its application for recognition (see Exhibit A).

#### 3.2 Community Outreach

The CPG and its voting members shall routinely seek community participation in the CPG planning and implementation process to serve the best long-term interest of the community at large.

#### 3.3 Collection of Membership Data

To measure community representation, the CPG shall gather demographic data of existing and new CPG voting members at the time of elections or other regular periods to measure inclusion and diversity on the CPG. This data should be submitted to the City along with the annual rosters required by Section 2.5. Participation in this type of survey will be voluntary and will be conducted in a manner to ensure the privacy of responses and respondents.

### **4. CPG Composition**

#### 4.1 Number of Voting Members

The CPG will have no fewer than 10 and no more than 20 voting members, respectively,

representing the various community interests set forth in these Terms and Conditions. The Council may recognize a CPG with more than 20 voting members if the larger membership is necessary to give better representation to a community.

#### 4.2 Voting Member Eligibility

The CPG will ensure that voting members meet the following minimum qualifications throughout their entire term of service:

##### 4.2.1 Minimum Age

Voting members will be a minimum of 18 years of age unless the CPG has an appointed youth representative.

##### 4.2.2 Minimum Attendance Requirements

The CPG shall take attendance to ensure that each voting member attends at least two-thirds of the CPG's regularly scheduled meetings in any 12-month period throughout their term as a voting member. Failure to meet minimum attendance shall be grounds for disqualification of the voting member. No attendance requirements for voting member attendance prior to their election or appointment as a voting member are allowed.

#### 4.3 Community Representation

The CPG will ensure that voting members be affiliated with the community as either a: (1) property owner, who is an individual identified as the sole or partial owner of record, or their employee, of a real property (either developed or undeveloped), within the community planning area; (2) resident, who is an individual whose primary address of residence is an address in the community planning area; or (3) local business person, who is a local business or non-profit owner, operator, or designee at a non-residential real property address in the community planning area as evidenced by a business tax certificate or other official document.

##### 4.3.1 Appointed Seats

To ensure representation of unique stakeholder interests in the community planning area, the CPG may create appointed non-voting seats. These appointed non-voting seats must be described in the CPG bylaws.

#### 4.4 Voting Member Term Limits

The CPG shall establish term limits for its voting members to ensure that the membership is not dominated over time by individual voting members or groups within the community. These term limits will conform with the following guidelines:

##### 4.4.1 Maximum Time of Service

CPG voting members will not serve their service time for more than eight consecutive years if elected to two- or four-year terms, or nine consecutive years if voting members are elected to three-year terms. CPG voting members who accumulate this maximum service time can be eligible to serve again after a one-year break in service.

##### 4.4.2 Waivers of Maximum Time of Service

The CPG may develop procedures for waiving the maximum time of service by vote of its voting members of the CPG cannot find sufficient new voting members to fill vacant open seats after a good faith effort to do so. Should a CPG choose to exercise this waiver, it will use the following guidelines:

- (1) Waivers of Maximum Time of Service shall not be granted unless necessary to ensure there are at least 10 voting members (See Section 4.1).
- (2) Waiver of Maximum Time of Service to ensure there are at least 10 voting members shall be ratified by at least a two-thirds majority of the votes cast by eligible community members participating in the regular election; and
- (3) the term of a voting member elected by a two-thirds vote serving beyond the Maximum Time of Service should count as time served beyond the required break in service as required by this section.

## **5. Open and Public Elections**

### 5.1. Equal Participation

The CPG shall develop election procedures to encourage equal participation by all members of the public of a community, including term limits which voting members of a recognized CPG can serve.

All members of the public affiliated with the community within the geographical boundary of the CPG will be allowed to vote in CPG elections, so long as they meet minimum conditions for eligibility per Section 4.2 of these Terms and Conditions and comply with the following:

- Only one elected CPG voting member per business tax certificate
- Only one elected CPG voting member per property tax billing

No additional qualifications, such as attendance requirements, will disqualify someone from voting, and no voting requirement will be stricter than allowed by the California Elections Code or Section 5.1.1.

#### 5.1.1 Voter Identification for Resident Community Members

Consistent with state and federal law, proof of residency or identity, should consist of presenting an original or copy of any of the documents described below in either paragraph (1) or (2). These requirements should be construed liberally by CPGs and any doubt resolved in favor of allowing a community member to vote in the election.

(1) Current and valid photo identification provided by a third party in the ordinary course of business that includes the name and photograph of the individual presenting it. Examples of photo identification include, but are not limited to, the following documents: (A) driver's license or identification card of any state; (B) passport; (C) employee identification card; (D) identification card provided by a commercial establishment; (E) credit or debit card; (F) military identification card; (G) student identification card; (H) health club identification card; (I) insurance plan identification card; or (J) public housing identification card.

(2) Any of the following documents, provided that the document includes the name and address of the individual presenting it, and is dated since the date of the last election, unless the document is intended to be of a permanent nature such as a pardon or discharge, including: (A) utility bill; (B) bank statement; (C) government check; (D) government paycheck; (E) document issued by a governmental agency; (F) sample ballot or other official elections document issued by a governmental, agency dated for the election in which the individual is providing it as proof, of residency or identity; (G) voter notification card issued by a governmental agency; (H) public housing identification card issued by a governmental agency; (I) lease or rental statement or agreement issued by a governmental agency; (J) student identification card issued by a governmental agency; (K) tuition statement or bill issued by a governmental agency; (L) insurance plan card or drug discount card issued by a governmental agency; (M) discharge certificates, pardons, or other official documents issued to the individual by a governmental agency in connection with the resolution of a criminal case, indictment, sentence, or other matter; (N) public transportation authority senior citizen and disabled discount cards issued by a governmental agency; (O) identification documents issued by governmental disability agencies; (P) identification documents issued by government homeless shelters and other government temporary or transitional facilities; (Q) drug prescription issued by a government doctor or other governmental health care provider; (R) property tax statement issued by a governmental agency; (S) vehicle registration issued by a governmental agency; or (T) vehicle certificate of ownership issued by a governmental agency.

#### 5.1.2 Voter Identification for Community Business Owners

Business Owners within the community should present an original or copy of a Business Tax Certificate or equivalent document showing a business address within the CPG boundaries. These requirements should be construed liberally by CPGs and any doubt resolved in favor of allowing a community business owner to vote in the election.

#### 5.1.3 Voter Identification for Community Non-Profits

Employees of non-profits within the community should present an original or copy of their founding documents or a related document showing an associated address within the CPG boundaries. These requirements should be construed liberally by CPGs and any doubt resolved in favor of allowing a community member to vote in the election.

#### 5.1.4 Voter Identification for Community Non-Resident Property Owners

Non-residents who own property within the community should present documents similar to those described in 5.1.1 above, however at least one of these documents should show the address of the property in the community owned by the non-resident and be sufficient to prove ownership. These requirements should be construed liberally by CPGs and any doubt resolved in favor of allowing a community member to vote in the election.

### 5.2 Transparency and Inclusion in Operations

The CPG will adopt provisions within its operating procedures that will govern the election or appointment of voting members of the CPG, their removal if necessary, and the process to fill vacancies, among other provisions. These provisions will provide for a fair and transparent process, intended to ensure broad outreach to the community, sufficient time for community

members to participate in elections, and the principles of inclusion and diversity in CPG operations.

CPG operating procedures should address the following:

- Cut-off date for candidates to submit nominations, which generally should be a CPG's regular February meeting before an annual March election
- Verification of candidate eligibility prior to printing a ballot
- Creation of a ballot with all candidates identified by name
- Handling of write-in candidates, if applicable, including how to verify eligibility for a write-in candidate's name on a submitted ballot
- Handling of a candidate's absence from a scheduled candidates' forum
- Location(s) of polls, including managing multiple concurrent polling locations, if allowed
- Management of the polls
- Verification of voter eligibility as referenced in Sections 5.1.1-5.1.4 in these Terms and Conditions
- Ballot construction & content
- Setting election date(s)
- Setting voting time(s)
- Mail-in ballot procedures, if applicable
- Closing the polls
- Counting the ballots, including when, by whom, and how to account for a candidate continuing beyond eight or nine consecutive years of service
- Clarifying whether a plurality voting system is being used, or if a majority is required for a seat to have a declared winner
- Ballot record keeping
- Tie-breaking procedures
- Election challenge procedures
- Timing of installation of newly elected voting members
- Maintaining confidentiality of secret written ballots
- Discouragement of electioneering (individuals actively trying to convince voters to vote for a specific candidate at the time and place of the election)
- Next steps if a seat remains unfilled due to lack of, or ineligibility of, a candidate, or as a result of a successful election challenge.

### 5.3 Election Timing

The CPG will endeavor to host its elections during the month of March each year to be consistent with other CPGs.

## **6. Conduct of Meetings**

### 6.1 Professional Conduct

The CPG and its voting members will conduct themselves reasonably and professionally and refrain from disrupting the public process as set forth on the CPG's agenda.

6.2 Rules of Procedure

The CPG shall adopt rules of procedure for its meetings, such as Robert's Rules of Order or Rosenberg's Rules of Order, to provide a uniform means for the CPG to facilitate public meetings, conduct public business, and resolve disputes.

6.3 Transparency in Operations

The CPG will maintain transparency in its operating procedures as outlined herein and in Policy 600-24 to ensure open meetings with appropriate public notice to invite community participation in CPG meetings.

**7. Additional CPG Responsibilities**

7.1 Commitment to Non-Discriminatory Practices

The CPG, in conducting its responsibilities, will not discriminate against any person or persons by reason of race, color, sex, gender, age, creed, national origin, ancestry, sexual orientation, marital status, military or veteran status, genetic information, medical condition, or physical or mental disability.

7.2 Records Retention

The CPG will maintain its official records, including its rosters, annual reports, meeting agendas, and meeting minutes, for a minimum of five years (either on its website, in electronic files, or in hard copies) from the date each record is created, and will make all official records available to the City and to any member of the public upon request.

7.3 Ethical Standards

The CPG will outline and adopt ethical standards for all CPG voting members to guard against potential conflicts of interest and undue influence on any recommendation. These standards should include how CPG voting members can recuse themselves or abstain from voting on decisions when such a conflict exists. The CPG shall submit its adopted ethical standards to the City Council in its application for recognition by the City Council (see Exhibit A). The CPG should use the City's Ethics Ordinance as a guide in drafting its ethical standards. The following are examples of acceptable CPG ethical standards:

7.3.1 Example Standards of Conflicts of Interest

CPG voting members with a potential conflict of interest should recuse from participation in a recommendation if they have a direct economic interest. A direct economic interest includes, but is not limited to, investments in or positions with a business entity, interest in real property, source of income, source of gifts, and personal finances.

7.3.2 Example Exceptions to Conflicts of Interest

Exceptions to conflicts of interest may be granted by a CPG board to other CPG voting members who can show that the decision will not have an effect on their economic interest.



7.3.3 Abstentions for Potential Conflicts of Interest

CPG voting members may voluntarily choose to abstain from voting when that member has legitimate, non-economic, personal interests in the outcome that would, at minimum, give the appearance of impropriety, cast doubt on that member's ability to make a fair decision, or a where that voting member lacks sufficient information upon which to cast a vote. The CPG's record of the vote on the item will reflect an abstaining voting member in the vote and they are still counted in a community planning group quorum for that item, regardless of the point in time they declare their abstention.

7.3.4 Political Actions

Neither the CPG nor voting members in their capacity as such may use their title from or position on a CPG for political endorsements of individuals. The CPG may, however, upon majority vote, take a position on pending legislation that is within the CPG's purview.

7.3.5 Donations

Neither the CPG nor its voting members should accept donations on behalf of any individual running for office.

7.3.6 Equal Time for Candidates or Ballot Measures

The CPG will endeavor to grant equal time for candidates or ballot measures if docketed on the CPG agenda. Equal time does not apply to individuals speaking during non-agenda public comment.

7.4 Voting Member Training

The CPG will require all CPG voting members to complete the formal education program in-person or on-line offered by the City.

The CPG will require voting members to complete the training each year within 60 days of being initially elected or appointed to the CPG, and by no later than June 1<sup>st</sup> of each succeeding year for as long as the voting member is serving or re-elected.

Evidence of completion of annual training shall be part of the CPG's official records. Failure of voting members to complete the specified training each year will make the member ineligible to serve.

7.5 Collaboration with City Staff

CPG voting members will collaborate with the City on an ongoing basis and as requested by the City to increase its voting members' understanding of the role and responsibilities of the CPG.

**8. CPG Rights and Liabilities**

8.1 Indemnification

Pursuant to the policy of the City Council, the City will indemnify, and the City Attorney will defend, the CPG or its individual voting members, acting in their capacity to the City, under the

specified terms set forth in San Diego Ordinance No. O-19883 NS, adopted July 28, 2009, titled “An Ordinance Providing for Defense and Indemnification of Community Planning Groups,” (Ordinance), which may be amended from time to time. Defense and indemnification cover any claim or action of civil wrongdoing against the CPG or its duly elected or appointed voting members resulting from their obligations to advise and assist the City and its agencies with land use matters as specified herein, so long as their conduct was in conformance with these Terms and Conditions, all of the findings specified in the Ordinance can be made, and the rights to defense and indemnification are consistent with state law. The right to defense and indemnification do not apply to allegations of criminal wrongdoing, including alleged criminal violation of the Brown Act.

When the CPG or one of its individual voting members is found to be out of compliance with the provisions of Policy 600-24, or with these Terms and Conditions, they acknowledge they risk loss of defense and indemnification pursuant to the Ordinance, and any future amendments.

### 8.2 Violations and Remedies Related to Provisions Citing the Brown Act

Pursuant to provisions required by the Brown Act, including civil remedies (California Government Code sections 54960 through 54960.5) and criminal penalties (Government Code section 54959) for violation of the provisions, the CPG will ensure good faith, voluntary compliance with the Brown Act and proactively cure violations themselves, to prevent legal actions that would void CPG actions. Individual voting members of the recognized CPG, as well as the group as a whole, could be subject to civil remedies. Civil remedies may include relief to prevent or stop future or ongoing violations of the Brown Act, or to void past actions of the CPG, and may in some cases include payment of court costs and attorney’s fees.

Individual voting members of the CPG may also potentially face criminal misdemeanor charges for attending a meeting where action is taken in violation of the Brown Act, if the voting member intended to deprive the public of information to which the member knew or had reason to know the public was entitled. Action taken includes collective decisions or promises, and also includes tentative decisions. The CPG, or any of its individual voting members, may seek assistance, as well as training, from the City to better understand, implement, and comply with the Brown Act.

Any member of the public may refer alleged violations of the Brown Act by the CPG to appropriate law enforcement agencies, including the California Attorney General, San Diego County District Attorney, or San Diego City Attorney’s Criminal Division. The CPG, or any of its individual voting members, accused of criminal violations of the Brown Act does not have the right to legal protection or representation under these Terms and Conditions or San Diego Ordinance O-19883.

### 8.3 Violations of Membership Eligibility

Any CPG voting member who violates membership eligibility as defined in Section 4.2, may be removed by the remaining CPG voting members as outlined in Section 5.2

#### 8.3.1 Removal of Ineligible Voting Members

A CPG shall include in their Operating Procedures a procedure for removal of voting members for failure to retain eligibility, which should provide affected voting members with fair notice and require ineligibility determinations to be supported by documentation.

#### 8.4 Violations and Remedies

If the CPG violates these Terms and Conditions, it may forfeit its status as a recognized CPG and lose its right to indemnification and defense by the City. A CPG voting member and the CPG itself risks loss of defense and indemnification pursuant to current San Diego ordinances and any future amendments.

In the case of an alleged violation of these Terms and Conditions by a CPG voting member, the CPG will conduct an investigation consistent with Policy 600-24.

In the case of an alleged violation of Policy 600-24, the violation will be forwarded in writing to the City for review by the Mayor or their Designee. The CPG will respond to the City in a dialogue to determine the validity of the complaint and to seek resolution of the issue or dispute.

The CPG acknowledges that if the Mayor or their Designee is unable to resolve a dispute or determines that there has been a violation, the Mayor or their Designee may seek to resolve the dispute or violation informally, with the cooperation of the CPG, or may recommend to the City Council that the CPG's recognition be revoked.

The CPG acknowledges that if the City Council determines through a recommendation from the Mayor or their Designee that a CPG has violated their Terms and Conditions or Policy 600-24 and the CPG has failed to take corrective action deemed adequate in the sole discretion of the City Council, the City Council may revoke the CPG's recognition under this Policy. The City Council may also prescribe conditions under which official recognition may be reinstated.

#### 8.5 Disciplinary Actions of Individual Voting Members in Violation of Terms and Conditions

The CPG acknowledges that any of its voting members found to be in violation of these Terms and Conditions shall only be disciplined or removed by the CPG at a scheduled CPG meeting. This discipline or removal will be advertised on the agenda as an action item and the investigation or complaint will be reported to the City within 60 days of the allegation so as to ensure a fair and public process.

#### 8.6 Potential Conflicts of Interest

CPG voting members found to have a conflict of interest who did not recuse from a vote may be subject to disciplinary action by the officers of the CPG, which may include expulsion from the board. The CPG will report in writing instances of disciplinary action to the City within 60 days of any allegation.

#### 8.7 Violations and Remedies for Quorum and Attendance Requirements

If the CPG is unable to meet quorum and attendance requirements for three consecutive months, then City may place the CPG in a temporary inactive status, to allow the CPG to work through

its membership issues to return to active status. If the CPG remains unable to meet quorum and attendance requirements for six consecutive months, then the Mayor or their Designee may recommend to the City Council that the CPG's recognition be revoked.

8.8 Violations of City Requests for Input

The CPG acknowledges that a consistent failure to respond to the City's request for input on the preparation of, adoption of, implementation of, or amendment to the General Plan or a community, precise, or specific plans may result in revocation of recognition as referenced in Policy 600-24. Consistent failure to provide input on private development applications or public infrastructure projects may result in revocation of recognition. Further, that such a determination resulting in the forfeiture of rights to represent its community for these purposes will be made by the Council upon the recommendation of the Mayor or his/her Designee.

**9. Collective Action of the CPG**

The official positions and opinions of the CPG will not be established or determined by any organization other than the recognized CPG, nor by any individual voting member or subcommittee of the CPG.

**10. Term of the Terms and Conditions**

These Terms and Conditions will be effective in perpetuity of the life of the CPG unless recognition of the CPG is revoked by the City as described in Section 8.4 or the Terms and Conditions are updated to be consistent with Policy 600-24 as it may be amended.

Attachment:

EXHIBIT A: REQUIRED COMMUNITY PLANNING GROUP DOCUMENTS FOR AN APPLICATION FOR CITY COUNCIL RECOGNITION

**Community Participation & Representation Plan**  
**As required for Planning Group Recognition by Terms and Conditions,**  
**Exhibit A of Council Policy 600-24**

The Otay Mesa Planning Group (“Planning Group”) is committed to engaging a broad and diverse cross-section of our community members in monthly meetings and to electing Planning Group members who are representative of the community and community interests, including, but not limited to renters, youth, people with disabilities, and intergenerational households. Soliciting and obtaining broad input on projects and initiatives is critical to the success of our Planning Groups to serve as a recognized advisory body to the City.

The goal of this participation and representation plan is to communicate our PLANNING GROUP’s goals, guiding principles for outreach and communication, and a strategy for meaningful, ongoing engagement.

Our plan is crafted to reflect the unique demographics and characteristics of our community. Please see Community Plan Area (CPA) demographics provided by SANDAG’s [Data Surfer](#) website.

**Overarching Goal**

- Educate community members about the role of our Planning Group and opportunities for involvement.
- Establish partnerships with non-profits, community organizations, businesses, schools/universities and government organizations to build relationships and trust with the community.
- Increase and diversify participation in monthly Planning Group meetings and decision-making.
- Communicate about our CPG’s work and goals in simple, easy-to-understand language that is accessible for anyone regardless of their background in or knowledge of community planning.
- Obtain meaningful input from a broad range of community members on land use matters (e.g. General Plan and Community Plan Amendments, Community Plan Updates, project reviews, and other land use matters referred to them by the City).
- Be proactive in listening to community needs and effectively communicating these to the City.

**Guiding Principles for Public Participation**

- Provide all meeting information necessary to encourage community members to participate in a simple and accessible manner.
- Communicate in ways that are inclusive, transparent and respectful.
- Consistently share information with community members using a variety of methods (See Appendix A -Public Participation Tools).
- Make meeting materials available in the languages spoken within the community. Please see Census data for Community Plan Area (CPA) provided by SANDAG’s [Data Surfer](#) website.
- Be respectful of people’s opinions and time. Consider establishing grounds rules for dialogue or codes of conduct like those from the [American Bar Association](#) and the [National](#)

[Conflict Resolution Center.](#)

- Ensure a safe, accessible meeting space.

### **Strategies for Community Involvement**

- Create a simple Planning Group flyer to advertise in community hubs with meeting information included to help educate the community on the role of the CPG, how to get involved, and the benefits of serving on a Planning Group (See Appendix C – Sample flyer).
- Share meeting information in digital formats including social media pages and a dedicated CPG website (See Appendix C – Sample flyer and website).
- Consistently post printed monthly meeting information at local places including, but not limited to:
  - Local library (ies)
  - Park and Rec Building(s)
  - Public transit hubs
  - Grocery stores
  - Coffee shops
  - Schools
- Build relationships with other city advisory boards to cross-pollinate messaging.
- Set up informal meetings or calls with local non-profit organizations to introduce and discuss the Planning Group’s role and to build relationships.
- Advertise monthly meetings and elections in local community paper(s)/newsletter(s)/social media (See Appendix C – on information to include on flyers).
- Host informal events outside of Planning Group meetings to invite the public to learn about the Planning Group and how to participate in monthly meetings.
- Organize informal town hall events to solicit feedback on community needs. Select a time/day, location and format of the events and town halls that maximizes the opportunity for people not already engaged with the Planning Group to attend.
- Work with the council office and the Mayor’s Office to amplify outreach.
- Make online interactive activities, such as surveys, to seek input on community needs/ other initiatives (See Appendix B – Survey Best Practices).

### **Measuring Success**

- Monitor month-over-month and year-over-year meeting attendance, number of voters in elections, social media metrics as applicable, type and frequency of outreach efforts, events attendance lists, change in composition of voting members as evidenced in annual surveys, etc.
- Success should also be qualitatively measured by the intentional efforts made to bring in community members that have historically faced barriers to participation in Planning Groups. Document information in annual report and submit to the City via email: [SDPlanningGroups@sandiego.gov](mailto:SDPlanningGroups@sandiego.gov) within 14 days of the approval of the March minutes.

## Community Planning Groups

### Engagement Techniques Worksheet

This worksheet aims to build an understanding of public engagement techniques and what to consider when planning for engagement. The toolbox (below) lists the technique description and typical application. \*Adapted from IAP2 - International Association of Public Participation, <https://www.iap2.org>.

Technique and Description	Typical Application
<b>Briefings:</b> A regular meeting to provide an opportunity to inform and educate.	<b>Share Information:</b> An opportunity to reach various individuals by sharing a presentation with a stakeholder group in the community such as a town council, Business Improvement District or community-based organization.
<b>Hotline/Dedicated Planning Group phone number:</b> A phone line for public access to pre-recorded meeting information or to reach the planning group.	<b>Share Information:</b> A dedicated Planning Group phone number could allow the Planning Group or Subcommittee Chair to serve as the point of contact to respond to questions about upcoming agenda items or how project applicants can schedule their project at an upcoming meeting agenda.
<b>Electronic forums, social media groups, and email:</b> Sharing electronic information to notify stakeholders when new materials are posted, invite them to upcoming meetings, distribute comment and evaluation forms, share meeting summaries, collect comments and input, etc.	<b>Share Information:</b> Inexpensive process to directly reach stakeholders and allows people to share messages with each other.
<b>Printed public information materials:</b> Information materials such as fact sheets, newsletters, brochures, progress reports, etc. that can be printed and distributed.	<b>Share Information:</b> A mechanism to reach a large target audience through clear and visually engaging information. Planning Groups can share these materials with public places like libraries, community centers, and schools by asking staff if they can place the information in highly visible locations, as well as publicly indicating their availability on their agenda, website, social media, etc.
<b>Newspaper/Newsletter:</b> Can contain notices, summarized details on past/future engagement opportunities or comment forms in local newspapers.	<b>Share Information:</b> Newspapers/Newsletters – both digital and hardcopy – can include notices and summaries to allow wide distribution of information and gather public feedback.
<b>Websites:</b> Websites are developed to provide accessible information to the public.	<b>Share Information:</b> This online tool helps provide information in a central location about projects, plans, meeting agendas, events, etc. and can allow options for people to join email mailing lists and/or share online comments via a comment form. Websites can also share links to other relevant sites.

## Community Planning Groups

### Engagement Techniques Worksheet

Technique and Description	Typical Application
<p><b>Expert Panels:</b> An educational opportunity through a moderated discussion on important issues with experts from various fields.</p>	<p><b>Share Information:</b> Subject matter experts from the public and private sectors are invited to share information in a panel format open to the public.</p>
<p><b>Comment Forms:</b> Written or email/web-based forms for collecting and documenting input and comments from the public.</p>	<p><b>Collect and Compile Input:</b> Comment forms can help collect input from people unlikely to attend meetings or who might feel uncomfortable voicing their input at meetings.</p>
<p><b>Partnering with Community-Based Organizations:</b> Partnering with qualified local community organizations to help get the word out about Planning Groups or obtain community input.</p>	<p><b>Collect and Compile Input:</b> Helps promote community-based involvement and advocacy. This strategy also makes the most of existing networks that community organizations have developed.</p>
<p><b>Pop-Up Events:</b> These events offer an opportunity to participate in a large fair or community gathering by setting up a table with information and resources about participating in the Planning Group.</p>	<p><b>Bringing people together:</b> These events provide an opportunity to connect with community members on the ground, get feedback, answer questions and share information.</p>
<p><b>Open Houses:</b> An open house typically includes several informational stations, each addressing a separate issue. A resource guide can assist participants in touring through the exhibits at their own pace.</p>	<p><b>Bringing people together:</b> This event format helps foster small group or one-on-one communication on multiple land use issues or in coordination with a project applicant on a complex development project.</p>
<p><b>Tours and Field Trips:</b> This technique offers the Planning Group and community stakeholders an opportunity to visit a particular site or tour an area.</p>	<p><b>Bringing people together:</b> This activity allows individuals and small groups to understand existing site conditions firsthand and how these areas could be developed in the future. Planning Groups should ensure that a quorum of their group is not present at one time during these events to avoid any Brown Act issues.</p>
<p><b>Workshops:</b> An informal public meeting that may include presentations and include opportunities for interaction among participants.</p>	<p><b>Bringing people together:</b> An opportunity for discussion on criteria, analysis of alternatives, developing goals and objectives or creating a “community vision”. This activity helps foster small group or one-to-one communication to answer difficult questions or create new concepts. This format builds credibility and maximizes feedback obtained from participants working through a public process to address any issues.</p>



## Community Planning Groups

### Engagement Techniques Worksheet

Technique and Description	Typical Application
<p><b>Public Meetings:</b> These organized meetings are open to the public at large and are used to provide presentations and allow the public to ask questions and provide comments.</p>	<p><b><i>Bringing people together:</i></b> Participants are able to hear relevant information and have an opportunity to ask questions and make comments and here opinions and perspectives of others.</p>
<p><b>Web-based Meetings:</b> Meetings can also be held online to reach people who are normally unable to participate in person.</p>	<p><b><i>Bringing people together:</i></b> Online meetings can be cost- and time-efficient, and people can participate from their home, office, or mobile device via an online application. Please consult <a href="#">In-Person Meeting Guidance</a> when hosting a virtual or hybrid meeting per the <a href="#">Brown Act</a>.</p>

## Community Planning Groups

### Survey Best Practices

Surveys offer the ability to obtain useful data and feedback to inform recommendations and increase understanding of various issues. The following are survey best practices adapted from the City of San Diego Performance and Analytics Department (PandA) and other survey guides.

### Types of survey tools to consider:

<b>In-Person</b>	Conducted in-person, generally in a public place.
<b>Mail</b>	Surveys that are sent to participants via mail which may include envelopes to return the survey.
<b>Email</b>	Survey is emailed to potential participant via a link.
<b>Online</b>	A survey that is posted online via link on a webpage.
<b>Telephone</b>	Participants are called by interviewers and asked to answer survey questions.

### What is the purpose of your survey and who is your target?

<b>What is the purpose of your survey?</b>	What information are you missing, and how will this survey fill or inform those gaps? It's best to map out your problems, issues you would like to include, questions, and how each survey question will align to a problem. In the introduction, include any background information and articulate to the participant why the survey is being conducted.
<b>Determine how the survey results could influence future decisions.</b>	What decision, course of action or recommendation could you take based on the responses from each question? If you are unsure what action you can take based on a question, omit the question.
<b>Who is taking your survey?</b>	Consider the demographics of the people you're trying to reach. How might you need to design questions to help your audience best interpret them? Does your survey tool need to be translated into another language?
<b>How will you reach your target audience?</b>	Where are your respondents most likely to see the survey (social media, emailed directly to them)? How are they most likely to take the survey (over the phone, online, paper, on a mobile device, other)? How long will the survey be available?

## How should you develop your questions?

<p><b>Making sure that your questions and responses match.</b></p>	<p>If the focus of your question is about a Planning Group recommendation, then the response should use "recommend."</p> <p>If the question is asking about the likelihood for someone to support an issue or a concept, then the response should use "support."</p>
<p><b>Each question should only ask one thing.</b></p>	<p>Your questions should be direct and seek a specific answer. For example:</p> <p>"Are community parks clean and safe?" = wrong</p> <p>"Are community parks clean?" and "Are community parks safe?" = correct.</p>
<p><b>Develop clear and concise questions. Avoid technical jargon and abbreviations.</b></p>	<p>Good survey questions are written at a 5th grade reading level. You can check the reading level and readability of your questions using <a href="#">Microsoft Word</a> or the <a href="#">Hemmingway app</a>.</p>
<p><b>Ask: How can this question be misinterpreted?</b></p>	<p>Pretest your questions by asking them among others to gain feedback on the clarity of your questions and to evaluate any initial perceptions.</p>

## Writing your questions.

<p><b>Keep it simple and to the point.</b></p>	<p>The respondent shouldn't have to re-read the question for clarity.</p>
<p><b>Use words with clear meanings.</b></p>	<p>Avoid words like: most, many and several. Instead use: almost all, a majority of, and almost none.</p>
<p><b>Limit the number of ranking options.</b></p>	<p>Try not to list more than six items to rank in order of preference or importance. If you have more than six, consider breaking them up into different questions.</p>
<p><b>Multiple choice questions should cover all options but not overlap.</b></p>	<p>For example, when asking respondents about their favorite community destinations don't have an option for both "library and recreation center."</p>
<p><b>Avoid offering too few or too many options.</b></p>	<p>Offer the most likely options and then add an "other, please specify" as a fill-in option to capture any responses that are not covered.</p>

## Community Planning Groups

[Sample flyer and Planning Group Webpage](#)

Flyers can be used for posting on local community bulletin boards, libraries, coffee shops, or other neighborhood organizations' webpages to invite community members to join and be involved with their local Planning Group.

The following flyer was made by using the [Free flyer maker](#) on [Canva](#). Canva is a free, online design and visual communication platform. Additional tools for designing banners, posters, etc. are offered as well.

 **EXAMPLE FLYER**

# Community Planning Group

### WHY SHOULD YOU JOIN?

1. GET TO KNOW YOUR NEIGHBORS, DIFFERENT/SHARED PERSPECTIVES AND THE ISSUES THAT MATTER IN YOUR COMMUNITY.
2. GAIN A GREATER UNDERSTANDING OF GOVERNMENT FUNCTIONS AND HOW PLANNING GROUPS INFLUENCE PUBLIC POLICY.
3. SHARE YOUR INPUT ON DEVELOPMENT PROJECTS AND PUBLIC IMPROVEMENTS THAT ARE PLANNED IN YOUR NEIGHBORHOOD.
4. HAVE A SAY IN THE LONG-TERM FUTURE OF YOUR COMMUNITY.

  
**Meets every third Thursday at 6pm.**

**1234 Planning Rd  
San Diego, CA  
12345**

**Get in touch with the Planning Group Chair**

 **Chair Name Here**  
123-456-7890  
cpgchair@sandiego.gov

**For More Information: [www.reallygreatsite.com](#)**

## Community Planning Groups

[Sample flyer and Planning Group Webpage](#)

[Wix](#) is one of many online platforms that be used to design a Planning Group website. Wix has a free version where you can explore the basics of web design and have access to various templates and pages. You can start building your website on Wix through their [guided process](#).

# SAMPLE COMMUNITY PLANNING GROUP



HOME MEETING AGENDAS MEETING MINUTES OPERATING PROCEDURES GET INVOLVED More

### Welcome!

The Sample Community Planning Group (SCPG) is the City Council-recognized, independent advisory group for the Sample Community. Our responsibilities include providing recommendations to the City of San Diego on the adoption, amendment and implementation of Sample Community Plan, the General Plan and other land use matters. As the planning group for the Sample community, we are committed to engaging a broad and diverse cross-section of our community and representing the diversity of our community and its interests.



### Monthly Meetings:

Occur every 3rd Wednesday of the month.

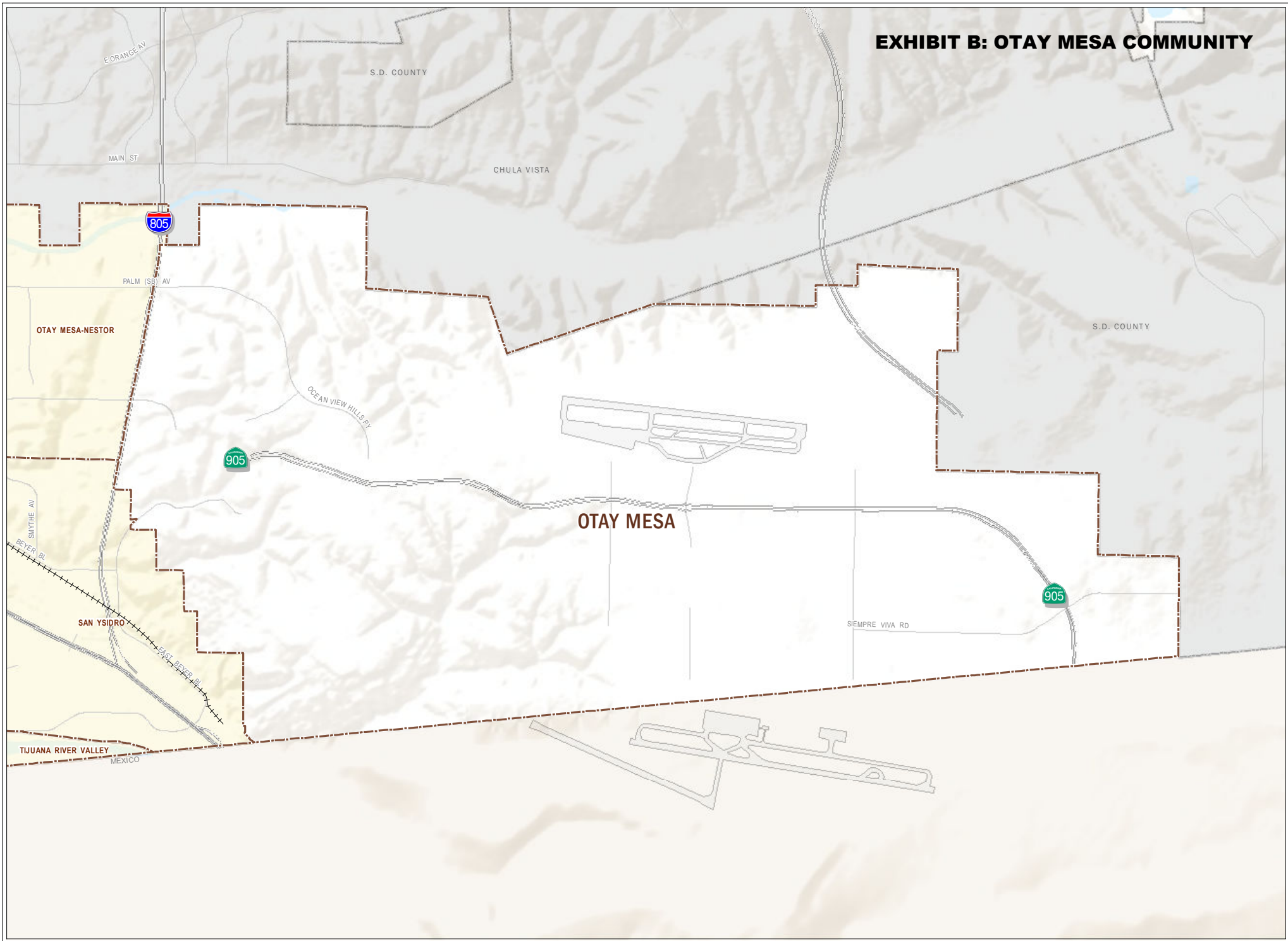
Location: Community Recreation Center

1234 Anywhere Avenue, SD CA 92199

Time: 6:00 p.m. to 8:00 p.m.

See Menu Bar above for meeting agenda.

# EXHIBIT B: OTAY MESA COMMUNITY



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