



THE CITY OF SAN DIEGO

MEMORANDUM

DATE: July 15, 2021

TO: The Balboa Park Committee
Agenda of July 22, 2021

FROM: Christina Chadwick, Assistant Deputy Director, Developed
Regional Parks Division

SUBJECT: Balboa Park: Framework for the Future
Update on Prioritization Framework Initiative

I. BACKGROUND

The goal of the Framework for the Future is to identify strategic priorities for future investment in Balboa Park, inform future decision-making and provide better alignment between available resources and what residents want to experience when they visit the park.

At the direction of the Balboa Park Committee, and through community outreach and input processes that began in January 2020, the Parks and Recreation Department identified the following priorities to be addressed in the Framework for the Future:

- Maintenance and Infrastructure
- Governance and Sustainable Funding
- Parking, Access, Circulation, and Mobility
- Programming, Culture, and Amenities
- Security and Safety
- Project Prioritization, Planning, and Review

The first initiative undertaken responds to the Project Prioritization, Planning and Review theme. This report provides details on the Project Prioritization Framework and how it will advance the park's long-term planning effort. A small working group of park stakeholders assisted

Department staff in developing a Request for Proposal (RFP) for consulting services to conduct the work required for this initiative. We greatly appreciate their time and expertise in developing this high quality document. We also appreciate the stakeholders who have provided critical review during the development of the RFP.

II. Request for Proposal (RFP) for Consulting Services for a Prioritization Framework for Balboa Park

The purpose of the RFP is to solicit proposals from consultants with demonstrated experience working with major urban parks, historic landmarks, and cultural designations. Interested Consultants are asked to provide an approach responsive to the scope of work, a timeline, and a cost proposal for the overall project. The RFP begins with an overview acknowledging the historic and iconic nature of Balboa Park as well as the multiple studies and plans that have been conducted through the years in service of enhancing and sustaining the park.

The scope of services include:

- Review Existing Plans and Documents
- Coordinate with Other Initiatives Underway in Balboa Park
- Compile a Comprehensive Project List
- Collate a Facilities Assessment and Building Conditions Report
- Develop a Project Scoring System
- Document the Process from Project Conception to Completion
- Engage the Public and Park Stakeholders
- Deliver a Comprehensive Prioritization Framework
- Ensure Approvals, Revisions, and Commitment

Noted in the RFP are the multiple park stakeholders that are key to the success of this process. Highlighted in the proposal evaluation is the importance of incorporating diverse voices and perspectives in this important work.

Upon the Balboa Park Committee's approval of this RFP, staff will work with the City's Purchasing and Contracting Department to conduct the search. Funding for this project has been approved by City leadership.

III. Your Support and Involvement

This is a massive effort with significant potential for Balboa Park. It has the potential to be a model for City planning process – how we see projects fitting together and moving to fruition for mutual benefit. Some might see this as curtailing their ability to pursue their agenda for the park. What is required is a willingness to invest in this prioritization process – a willingness to work together for its success.

Thank you for your thoughtful consideration.

Respectfully submitted,

Christina Chadwick
Assistant Deputy Director

Attachments:
Prioritization Framework RFP Draft

Request for Proposal (RFP) for Consulting Services for a Prioritization Framework for Balboa Park

A. OVERVIEW

The purpose of this RFP is to seek proposals from qualified consulting firms to provide professional services to the City of San Diego Parks and Recreation Department (Department). The Consultant (Consultant) shall assist the Department in developing an overall framework that results in a project prioritization process to be used to guide future investment in Balboa Park.

The goal of the Prioritization Framework is to identify strategic priorities for future investment in Balboa Park, inform decision making, and provide alignment between resources, stakeholder objectives, and experiences residents and visitors want to enjoy when they visit the park. The consultant will work closely with City staff in preparing the framework and will create a document for distribution to the public.

Balboa Park is a 1,200-acre historic urban cultural park in San Diego, California. The site is on the traditional land of the first people of the region, the Kumeyaay Nation. The park was reserved as open space by the City of San Diego in 1868, making it one of the oldest park sites in the United States dedicated to public recreational use. In addition to open space areas, areas of natural vegetation and extensive landscaping, gardens, walking and bike paths, roadways and parking areas, the Park contains numerous museums, performing arts venues, and the world-famous San Diego Zoo. There are also many recreational facilities, gift shops and restaurants within the boundaries of the park.

Of historical significance, an area of Balboa Park was developed to host the 1915–16 Panama-California Exposition and 1935–36 California Pacific International Exposition, both of which left architectural landmarks. The site of the expositions within Balboa Park was declared a National Historic Landmark, and National Historic Landmark District in 1977, and placed on the National Register of Historic Places. The city sought to repurpose these historic venues by making them available to arts and culture organizations, and as a result in 2017 the state designated the area of the former expositions as a California Cultural District.

As described by the State of California, designated California Cultural Districts “highlight the cultural legacy of our state’s most valuable resource – its diversity. From larger urban areas to uncharted rural locations, each district helps grow and sustain authentic arts and culture opportunities, increase the visibility of local artists, and promote socioeconomic and ethnic diversity through culture and creative expression.” Within Balboa Park is an area densely packed with nonprofit arts, science, and culture organizations, artists, historic buildings, gardens, and more. Primarily focused in the area known as Central Mesa, this incredible array of people and assets combine to deliver a variety of cultural experiences unmatched in our region. Not limited to this geographic boundary, there are associated venues and events that have cultural significance and can be considered as happening within the district: Marston House Museum and the annual PRIDE event are examples that are physically connected to the West Mesa but can be included in the Cultural District context.

The historic nature of the park offers particular opportunities and challenges which should be addressed in the scope of this work. The Cultural District's historic buildings, as well as historic landscape are a treasure that are expected to be preserved as significant civic assets and resources.

In recent years, many studies have been undertaken and innovative recommendations proposed in an effort to set Balboa Park on a sustainable future providing amenities and attractions for current residents, visitors, and future generations to enjoy. The current Balboa Park Master Plan was adopted in 1989 and most recently updated in 2012 with a vision "to nurture and enhance the recreational and passive resources of the park to meet the needs of the region and surround community, while respecting its physical, cultural and historical environment." Two precise plans for various areas of the park were adopted as well: the Central Mesa Precise Plan and the East Mesa Precise Plan. In 2008, the Trust for Public Land produced a report entitled "The Soul of San Diego: Keeping Balboa Park Magnificent in Its Second Century." This report raised concerns about the financial support and governance of Balboa Park. The Balboa Park Committee, a citizens' advisory body, responded with its own report "The Future of Balboa Park: Funding, Management and Governance." Both reports address core concerns with the operations and future care of Balboa Park and will be foundational to this prioritization framework.

The primary task of the selected consultant will be to make recommendations that provide guidance as to how to review and prioritize projects for the future of the park based on these and other factors:

- A comprehensive strategy for growing the park, preserving the park, and incorporating new uses that uphold the design integrity of the buildings and public spaces within the park
- Incorporate approved and community based planning documents
- Incorporate proposed projects spearheaded by Balboa Park's non-profit groups and other community stakeholders identified in their planning documents
- Incorporate economic assessment of projects with a return-on-investment analysis of proposed projects (valuing increased dollars to the park and amenities, as well as investment in social infrastructure)
- Provide a clear understanding of the resources required to enable informed decision-making

What it is not: It is important to understand what is not anticipated to be part of this assignment. This scope of work does not anticipate the following as part of this scope of work:

- A new master plan for the park
- A cultural landscape report
- A best practices manual for landscape maintenance
- An operations and management plan
- A straight capital improvement plan (while the Prioritization Framework is not a new master plan, it will form the basis of an implementation strategy for maintaining and improving the park and the basis for a Capital Improvement Plan)

B. THE CONSULTANT TEAM

Skills: Respondents to this request for proposal should have demonstrated experience working with major urban parks and in cultural destinations in North America. Skills in public facilitation, landscape design, and knowledge of working within national historic landmarks will be needed. These skills may

come either from the selected primary consultant or one or more subconsultants they wish to add to their team.

Proposal: The Consultant will provide an approach responsive to the scope of work, timeline, and cost proposal for the overall project.

References: The Consultant will provide a minimum of four (4) references for work similar to this project within the last five (5) years and include a detailed description of the services, the agency or firm names, contact names and phone numbers, and dates of services provided.

C. SCOPE OF WORK

The timeframe for this Scope of Work is 18 months from award of contract. The Consultant's services to the City shall include, but are not limited to:

1. Review of Existing Plans and Documents

Review existing plans and documents related to Balboa Park – including those formally approved/adopted by the City and those completed in service of the park but not formally adopted. These and other documents are available on the department's website. Documents include, but are not limited to:

- Balboa Park Master Plan and subsequent Plan Amendments
- Central Mesa Precise Plan and subsequent Plan Amendments
- East Mesa Precise Plan
- Balboa Park Facilities Condition Assessment
- Balboa Park Amenity Assessment
- Balboa Park Unfunded Park Improvements List
- Soul of San Diego: Keeping Balboa Park Magnificent in Its Second Century
- The Future of Balboa Park: Funding, Management, and Governance
- Balboa Park Cultural Experience Plan RFP
- Historic Nomination Forms
- Land Use Parking and Circulation Plan
 - Friends of Balboa Park Addendum
- Parking Management Action Plan

Additional strategic documents that will have a bearing on Balboa Park's Prioritization Framework must be reviewed. These will be recommended by staff, stakeholders, and community members during the project. The Department will serve as the conduit to share these with the Consultant and to facilitate understanding of their importance.

- The City of San Diego's Climate Action Plan (adopted December 2015)
- The City of San Diego's Parks Master Plan (anticipated to be adopted August 2021)

2. Coordinate with Other Initiatives Underway in Balboa Park

The Prioritization Framework is one component of multiple initiatives underway focused on Balboa Park. Knowledge of these initiatives and findings will be important. A key example is The Balboa Park Cultural Partnership's efforts to enhance a visitor's experience of the cultural district at the core of the park. They have undertaken the development of an Experience Plan that will integrate and elevate key resources. The goals of the Experience Plan are that it:

- Presents a vision for an exceptional visitor experience that aligns the sometimes conflicting elements of the Cultural District
- Ensures that the Balboa Park Cultural District visitor experience is reflective of, welcoming to and meaningful for all San Diegans and tourists
- Is made sustainable by maximizing the returns for experience providers
- Is integrated with concurrent planning efforts such as the Framework for the Future, Placemaking, and other efforts

Additional initiatives to be coordinated with are described in more detail in Section B and include:

- Mobility Initiatives
- Design Review Process
- Balboa Park Conservancy Activation Plan
- Sustainable Funding and Governance Study

The Department and the Consultant will work together to ensure ongoing collaboration and communication between the initiatives. The Department will work to delineate clear project scopes, facilitate alignment, and resolve concerns that emerge.

3. Comprehensive Project List

Identify and collate all projects that have been proposed but not completed or initiated through prior studies, plans, partners, and the public. This includes projects in the Balboa Park Master Plan and Precise Plans (gardens, Plaza de Panama Project, parking structure) and general development plans. The Comprehensive Project List shall include repairs and upgrades of existing buildings and amenities (i.e., restrooms, roofs, building systems, seismic retrofits, playgrounds, roads, parking lots, plazas, etc.). The list shall also include proposed projects that create new and aspirational uses, areas, and/or buildings as well as mobility projects that are supported in data collected regarding new needs and other studies.

Although the Comprehensive Project List will include numerous projects that will require use of the City's capital improvement program processes, it will also include projects that will be implemented using other methods, for example, volunteers, departmental staff, and private contributions.

The Consultant is asked to incorporate both an individual project perspective as well as an integrated project area perspective. For example, looking at how lighting and walkways and streets come together to compliment a larger outcome.

One of the parallel initiatives noted above (not included in this RFP) will be addressing current mobility challenges in Balboa Park with recommendations to increase access and improve traffic flow, circulation, parking, and other amenities. Projects identified in these studies will be incorporated into the Comprehensive Project List.

4. Facilities Assessment and Building Conditions

Compile an inventory with a facilities assessment and building conditions report. Collate prior facilities assessment reports and cost projections for remediation, identify costs not noted in prior assessments (Americans with Disabilities Act, structural evaluations) and flag urgent needs. Utilize cost categories (under \$25,000, \$26,000 to \$100,000, etc.) for projections. This report will result in an updated comprehensive understanding of the facility conditions and cost projections for remediation in the park.

Due to the historic nature of many of the buildings in Balboa Park, when identifying projects with historical significance, the use of the Standards outlined in the Secretary of the Interior's guidance for preserving historical resources/cultural landscapes is required. These steps must be incorporated into assessment data.

5. Project Scoring System

Following completion of Tasks 1-3 outlined above, Consultant will be responsible for developing a scoring system for assessing and prioritizing all projects. The scoring system shall incorporate current best practices from innovative park work as well as incorporate local concerns generated from many years of involved residents and policy makers. Synthesis of multiple perspectives and priorities – economics, tourism, park use, cultural district perspective, preservation - is fundamental to a successful system. This will be a resource for future development over the next 20 years.

The scoring system shall be based on objective criteria and include multiple levels of information on each project. The Consultant's expertise will be used to determine most appropriate categories and designations to use. The Department will provide data as needed for scoring (for example, funding sources identified). The following provides an initial overview of the rubric for scoring projects.

Purpose of the Project

- Why – the purpose of the project
- Need – projects that are required/essential for preservation of the park
- Goal – projects that restore the historic quality and grow the park, aspirational goals
- How – the project enhances the visitor's experience of the park

Support for the Project

- Public support mobilized for the project
- Elected officials expressed support for the project (political will)

Funding Source and Economic Impact

- Funding source(s) identified
- Return on investment, economic impact on the park and the region
- Collaborative funding partners involved (philanthropic, affinity groups, etc.)

Complementary Uses

- Identify individual projects and the connectivity of a group of projects for greater impact
- Identify the use the project promotes, for example activating a space, passive, untouched, recreational
- Note historical significance and preservation, of resources and cultural landscape

Additional Concerns Addressed

- Mobility, accessibility, circulation
- Health and safety risks
- Security concerns
- Homeless impact

Implementation and Ongoing Maintenance

- “Low and mid hanging fruit”; short, mid, and long-term projects
- Requires a plan amendment
- Accomplished by park staff, city forces, or capital improvement process
- Ongoing ownership and upkeep
- Maintenance required

The scoring system should be in alignment with Council Policies guiding this type of work including Council Policy 800-14 – Prioritizing Capital Improvement Program Projects.

6. Decision-Making Process and Design Review

Document how a project moves from concept to completion in a transparent flowchart, incorporating the opportunities for community input in the decision-making process and noting all the avenues available for completion of projects. Existing process/project assessment flow charts (level of impact on the park, consistent with policy documents, within a historic area, etc.) will be provided for Consultant’s review and incorporation.

To illustrate the process and gather input before the Consultant makes a final recommendation, the Consultant will develop a case study of a recent project and show its “path of travel” from concept to completion, including how City departments are involved. The Consultant will facilitate a community input session and then make recommendations for improvement for consideration by the Department. Upon approval, the Consultant will document the final flowchart.

A Design Review Process for Balboa Park Projects is another complementary study underway. An Exploratory Committee is working on recommendations for increasing design quality and public engagement at the beginning of a project’s inception. Awareness and potential integration of the results of this study will be important.

Consultant will include how City elected officials and department staff, park stakeholders, and the public meaningfully engage in the prioritization and decision-making process. The engagement process should be in alignment with the Council Policies guiding this type of work including Council Policy 600-33 – Public Notification and Input for City-wide Park Development Projects.

7. Public and Park Stakeholder Engagement

During the development of the Prioritization Framework, the Consultant will provide opportunities for a broad representation of the general public and park stakeholders to be aware of the progress being made, provide input, guidance, ideas, and critique, and understand the overall Prioritization Framework upon completion.

In working with the general public, it is the City and Department's goal to incorporate a diversity and equity lens in the work. The scope of work anticipates processes designed for intentional outreach and inclusion of diverse voices across the region. Consultant's strategies for broadening outreach and using multiple platforms (public meetings, social media, an ongoing electronic method for providing input during the process, etc.) to engage a rich diversity of voices in the process is most welcome.

In working with park stakeholders, it is the Department's goal to collaborate toward mutually beneficial goals. Balboa Park is home to many cultural institutions and museums, gardens, attractions, and affinity/coordinating bodies all of which have their own boards and constituencies (Attachment A). The Department maintains the grounds of all of these facilities and some of the buildings. Many of these entities raise their own capital but are not responsible for maintaining or upgrading buildings. This scope of work anticipates a process by which these groups are informed, and their input incorporated at key points.

There are a minimum of four key points at which information/input sessions for the general public and park stakeholder input shall be held:

- 1) Overview of the project plan at initiation
- 2) Development of the project scoring rubric
- 3) Documentation of the decision-making process and design review
- 4) Clarity of the comprehensive framework

The Consultant shall incorporate the expressed values of the community and stakeholders into the framework.

The Consultant will provide updates to Department staff to facilitate monthly updates to the Balboa Park Committee. The Consultant will provide a formal presentation of the comprehensive framework to the Parks and Recreation Board at the conclusion of the scope of work. The Consultant will coordinate with Department staff who provide ongoing updates to the park stakeholders and general public via emails and social media posts.

8. Comprehensive Prioritization Framework

The Consultant shall deliver an overall Prioritization Framework report that incorporates all parts of this work for distribution to the public in digital format and in an original editable format to the Department. This will include:

- 1) The facilities assessment and building conditions report
- 2) The comprehensive project list incorporating the project scoring system
- 3) The decision-making process and design review map
- 4) Recommendations for incorporating new and emerging projects and for keeping this work vibrant and relevant in the future

The Department will undertake concurrent efforts including an evaluation of governance and sustainable funding mechanisms for Balboa Park. This, and the other initiatives noted in this RFP, will be consolidated into one comprehensive “Framework for the Future” to guide park decisions for generations to come.

9. Approvals, Revisions, and Commitment

The Department will be responsible for shepherding the framework through Mayor and Council approvals. The Department will incorporate future revisions required to keep the Prioritization Framework current and relevant. The Department will also be responsible for keeping the framework available to the public.

The Department and City will demonstrate its commitment to implementing this Prioritization Framework by creating internal structures and policies that align with and support the processes developed in this initiative, by garnering support from elected and civic leaders, by incorporating funding into annual budget allocations, and by empowering stakeholders to make this plan a reality.

C. DEPARTMENT ROLES AND RESPONSIBILITIES

Department roles and responsibilities include the following:

1. The Department will ensure that management and key personnel, and any other subject matter resources, will be reasonably and timely available, as required by the Consultant for meetings and knowledge transfer.
2. The Department will ensure that all prior studies and plans relating to this project will be provided to the Consultant.
3. The Department will make timely decisions and obtain required management approvals for the Consultant to perform its obligations.

4. The Department will prepare any staff reports required for action by stakeholder groups.

D. CONSULTANT ROLES AND RESPONSIBILITIES

In addition to the scope of services, Consultant will fulfill the following operational roles and responsibilities:

1. Use experience to provide reasonable, accurate and specialized recommendations and information to the Department.
2. Provide regular updates to Department staff.
3. Provide presentation media for general public and stakeholder presentations and workshops and conduct the meetings accordingly.
4. Ensure deadlines and deliverables are met or inform Department staff of pending concerns.
5. Document and provide meeting minutes for all meetings with the Department and all meetings with general public stakeholder groups.
6. Provide staff with information required for preparation of staff reports.

D. EVALUATION OF PROPOSALS

The following elements represent the evaluation criteria that will be considered during the evaluation process:

	<u>MAXIMUM EVALUATION POINTS</u>
1. Responsiveness to the RFP	15
a. Requested information included and thoroughness of response.	
b. Understanding of the project and ability to deliver as detailed in an Executive Summary.	
c. Expertise and experience are clearly conveyed and demonstrated in the submission.	
d. Required documents as stated in this RFP are complete and without omissions.	
2. Firm's Capability to provide the services and expertise and Past Performance	35
a. Previous work on similar projects with successful outcomes.	
b. Demonstrated expertise in these types of comprehensive and complex studies.	
c. Capacity/Capability to meet and City of San Diego needs in a timely manner.	

	d. References which support information demonstrated in proposal.	
3.	Approach	45
	a. Approach aligns with City's expected successful outcome.	
	b. Clearly defined approach indicated in proposal.	
	c. Demonstrates the use of an equity and inclusion lens in approaching this work	
	d. Clearly describes the most broad and inclusive engagement strategies with public groups to foster a maximum diversity in viewpoints.	
4.	Interview/Oral Presentation	10
	a. Proposer demonstrates the ability to communicate information that is concise, easy to understand, and relevant to the goals of this solicitation.	
5.	Cost	15
		120
	FINAL MAXIMUM EVALUATION POINTS	

Additional Points:

Demonstrated actions that include diversity, equity, and inclusion in consultant team and subcontractors (MBWE, WBWE, etc.)	20
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The City's Purchasing and Contracting Department will provide guidance on this language and scoring process.

Attachment A – Park Stakeholders

Cultural Institutions and Museums in Balboa Park

- Boy Scouts of America
- Campfire Boys and Girls
- Centro Cultural de la Raza
- ComicCom Museum (Federal Building)
- George W. Marston House
- Girl Scouts of America
- Mingei International Museum
- Museum of Photographic Arts
- Museum of Us (formerly the *Museum of Man*)
- Reuben H. Fleet Science Center
- San Diego Air & Space Museum
- San Diego Art Institute
- San Diego Automotive Museum
- San Diego History Center

- San Diego Model Railroad Museum
- San Diego Museum of Art
- San Diego Natural History Museum
- Timken Museum of Art
- Veterans Museum and Memorial Center
- World Beat Cultural Center

There are also 17 specialized gardens with their own boards and constituencies as well as with the museums, each garden has its own specialized constituency.

- Old Cactus Garden / Kate O. Sessions Cactus Garden
- Alcazar Garden
- Australian Garden
- Botanical Building
- California Native Plant Garden
- Casa del Rey Moro Garden
- Desert Garden
- Florida Canyon Native Plant Preserve
- Marston House Garden
- George Washington Carver Children's Ethnobotany Garden
- Inez Grant Parker Memorial Rose Garden
- Japanese Friendship Garden
- Lily Pond
- Old Naval Hospital Garden
- Palm Canyon
- Trees for Health Garden
- Veterans Memorial Garden
- Zoro Garden

Attractions and Venues: There are also 22 attractions and venues in the park in addition to the museums and gardens.

- Balboa Park Activity Center
- Balboa Park Carousel
- Balboa Park Club
- Balboa Park Lawn Bowling Greens
- House of Hospitality/Prado Restaurant
- Rube Powell Archery Range
- Balboa Stadium
- Casa de Balboa
- Casa del Prado
 - San Diego Youth Symphony
 - San Diego Floral Society

- San Diego Junior Theatre
 - San Diego Native Plant Society
 - Senior Services
- Horseshoe Club
- House of Pacific Relations International Cottages
- Morley Field Sports Complex (West Mesa Recreation Facilities)
 - Balboa Park Golf Course
 - Bud Kearns Memorial Swimming Pool
 - City College Baseball Field
 - Golden Hill Recreation Center
 - Grape Street Dog Park
 - Morley Field Archery Range
 - Morley Field Ballpark & baseball/softball complex
 - Morley Field Bocce Ball Courts
 - Morley Field Cross Country Course
 - Morley Field Disc Golf Course
 - Morley Field Remote Control Race Car Track
 - Morley Field Tennis Stadium & Balboa Tennis Club complex
 - San Diego Velodrome
- The Blind Community Center of San Diego
- Municipal Gymnasium
- Old Globe Theatre
- Palisades Building
 - Recital Hall
 - Marie Hitchcock Puppet Theater
- Redwood Bridge Club
- San Diego Zoo
 - Balboa Park Miniature Train
- Spanish Village Art Center
 - San Diego Mineral and Gem Society
- Spreckels Organ Pavilion
- Starlight Bowl
- United Nations Building
- War Memorial Building

Coordinating and Affinity Groups

- Forever Balboa Park (Balboa Park Conservancy & Friends of Balboa Park)
- Balboa Park Cultural Partnership
- Committee of One Hundred
- Balboa Park Online Collaborative
- Save Starlight

- San Diego Unified School District
- Balboa Park Heritage Association

Attachment B: Public Inclusion and Equity Lens

The City of San Diego and the Parks and Recreation Department are committed to engaging a rich diversity of voices and perspectives representing all San Diegans in this process.

The Balboa Park Cultural Partnership's IDEA Committee is developing an approach to inclusion, diversity, equity, and accessibility that will be a resource for this and future studies in the park.