

**CITY OF SAN LUIS OBISPO
PLANNING COMMISSION AGENDA REPORT**

ITEM #1

FROM: Kim Murry, Deputy Director KM

MEETING DATE: June 25, 2008

Prepared By: Michael Codron, Associate Planner (781-7175)

FILE NUMBER: SP 209-98

PROJECT ADDRESS: Orcutt Area – 231 acres of land in the southeastern portion of San Luis Obispo, bounded by Tank Farm Road, Orcutt Road and the Union Pacific Railroad.

SUBJECT: Review of Chapter Eight, Public Facilities Financing, and Chapter Nine, Implementation and appendices of the Orcutt Area Specific Plan (OASP).

SUMMARY RECOMMENDATION

Receive public comment and provide direction to staff on changes to be incorporated into Chapter Eight and Chapter Nine of the draft OASP.

BACKGROUND

Situation/Previous Review

On May 28, 2008, the Planning Commission completed its review of Chapter Four through Chapter Seven of the draft OASP. Draft minutes from the meeting are attached to the Commission's agenda packet. This agenda report provides an overview and recommendations regarding changes to Chapter Eight, Chapter Nine and the appendices of the OASP.

Public Facilities Financing Plan (PFFP) Overview

The PFFP was distributed to the Planning Commission on May 28th and is attached to this report for reference (Attachment 1). The PFFP describes costs and financing alternatives for area-wide projects (such as the parkland improvements) that are needed to serve specific plan development, and does not include costs for in-tract improvements such as local streets. The first six chapters of the PFFP, including the executive summary, would be reformatted to fit into the OASP as Chapter 8. The appendices of the PFFP would be kept on file in the Community Development Department as a reference.

The PFFP was prepared by Goodwin Consulting Group for the City. The cost estimates for the infrastructure projects that are included in the appendices were prepared by Wallace Group. The costs described are based on 2007 values and represent a snapshot in time. These costs may be updated from time to time when new information becomes available, resulting in revised fees. In addition, annual adjustments based on the Consumer Price Index are typically incorporated into the resolution or ordinance that implements the fee program.

It is important to note that the City has recently hired an appraiser to conduct a survey of comparable real estate transactions as a way to verify the assumed land values included in the PFFP. The land values contribute significantly to the cost of the parks, the regional drainage facility and the low-income housing. A change in the assumed land value will have a corresponding effect on the per-unit and per-acre fees currently identified in the PFFP.



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Owner Participation in the Fee Program

Although owner participation in the planning process has been fractured at times, the overall process has benefited because one property owner owns enough land to accommodate multiple public facilities, including all of the parkland, the regional detention basin site, and the low-income housing site. Of all the fees that will be collected from Orcutt Area development, including City-wide fees, approximately \$9 million (17% of the total) reflects the land value assigned to these facilities. The property owner would be reimbursed for this land value to the extent that the dedication exceeds their fair share of the cost.

This relationship highlights the efficiencies being accomplished through owner cooperation and participation in the fee program. If every property owner had to provide their own improved parkland and on-site drainage facilities, the properties would have far less development potential and the City would lose an opportunity to meet its housing goals. The City and future Orcutt Area residents also benefit from the larger, more efficient shared facilities, such as the central park.

However, there does need to be equity between the owners that are dedicating the land and the owners that are paying for the land in-lieu of providing those facilities on their property. If the fee-paying property owners feel like they would be better off providing those facilities themselves because the land costs for parkland are too high, then this process will not be successful. Therefore, City staff continues to promote an open dialogue between property owners and is working to facilitate agreement on the components of the PFFP.

Planning Commission Role

Some property owners have expressed concerns to staff regarding costs for public facilities, and the Planning Commission should expect testimony on this issue. Again, the City has hired an appraiser to verify the assumed land values included in the PFFP, which are a large component of the overall cost. This information may be available by the time the Commission meets on June 25th.

In any case, the Planning Commission need not feel that they are the arbiter between property owners on this matter. The Planning Commission's role is to review the PFFP and determine that it provides an adequate program for financing the public facilities described in the OASP. City staff will continue to work with the property owners towards agreement on the costs and fair-share percentages included in the PFFP.

EVALUATION

The policy basis for requiring development to help pay the costs for the public facilities and services needed to support new development is found in LUE Policy 1.13.

LUE Policy 1.13 Costs of Growth: The costs of public facilities and services needed for new development shall be borne by the new development, unless the community chooses to help pay the costs for a certain development to obtain community-wide benefits. The City will adopt a development-fee program and other appropriate financing measures, so that new development pays its share of the costs of new services and facilities needed to serve it.



The Public Facilities Financing Plan (PFFP) describes the public facilities that are required to serve future development in the Orcutt Area and identifies the impact fees to be collected from each land use to fund the facilities on a pay-as-you-go basis. The PFFP also estimates annual revenues from impact fees and identifies potential gaps in funding - where the costs of certain facilities may exceed the revenue collected at the time the facility is required. The PFFP identifies financing strategies, including developer equity and bond financing (e.g. Mello-Roos) that can close the gap and allow the infrastructure project(s) to proceed.

Overall OASP Cost Comparison

Staff has prepared the following fee comparison between the Orcutt Area and the Margarita Area as a way to provide some context for the proposed fees. The overall impact fee picture is composed of two components, city-wide fees that are the same everywhere in the city, and “add-on” fees, which are specific to the expansion areas and are needed to fund the infrastructure requirements demanded by the new development. The table below summarizes typical impact fees for a new home within the 1994 city limits.

City-wide Impact Fees (per unit)		
<i>Fee Category</i>	<i>Single-Family</i>	<i>Multi-Family</i>
Water	\$15,292	\$12,234
Sewer	\$6,672	\$5,338
Traffic	\$3,039	\$2,745
Parkland In-Lieu	\$4,987	\$3,954
Affordable Housing In-Lieu	\$10,355	\$4,996
Total	\$40,345	\$29,267

The next table summarizes “add-on” fees in the Margarita Area. In addition to these “add-on” fees, expansion areas are subject to city-wide fees for water, sewer and traffic. Parkland and affordable housing requirements are normally met within the expansion area, so these city-wide fees are not carried over to the expansion areas.

Margarita Area Impact Fees (per unit)		
<i>Fee Category</i>	<i>Single-Family</i>	<i>Multi-Family</i>
City-wide water, sewer, traffic	\$25,003	\$20,317
Water “add-on”	\$853	\$682
Sewer “add-on”	\$1,630	\$1,304
Traffic “add-on”	\$5,241	\$3,175
Margarita Parkland	\$12,287	\$9,144
Margarita Affordable Housing	(developer responsibility, no fee program created)	
Specific Plan and EIR	\$176	\$167
Total	\$45,190	\$34,789

The Margarita Area Specific Plan includes an affordable housing requirement, but did not identify a specific site for low-income housing, as is done in the Orcutt Area. As a result, there is no fee program established in the Margarita Area, but the relative costs of providing affordable housing in both areas should be comparable because the affordable housing requirement is the same. Therefore, the table below takes out the Orcutt Area affordable housing fee to provide an “apples to apples” comparison.



Orcutt Area Impact Fees (per unit)		
<i>Fee Category</i>	<i>Single-Family</i>	<i>Multi-Family</i>
City-wide water, sewer, traffic	\$25,003	\$20,317
Water "add-on"	\$0	\$0
Sewer "add-on"	\$2,975	\$2,380
Traffic "add-on"	\$6,218	\$4,344
OASP Parkland (includes required mitigation fee)	\$19,113	\$14,223
OASP Affordable Housing	(not included to allow comparison with MASP)	
Specific Plan and EIR	\$1,401	\$525
Total	\$54,710	\$41,789

Two additional Orcutt Area Impact Fees are not included in this table. These include the storm drainage fee and the pedestrian and bicycle paths fee. These are costs that will be realized by development in both expansion areas. However, in the Orcutt Area, cost estimates have been made for all of these facilities and the fee program is seen as the most equitable way to share these costs by many property owners. (See Attachment 1, Table ES-1 for the summary of all fees to be paid by Orcutt Area development.)

In the case of the Margarita Area bike paths, these costs will be borne by the developers as "in-tract" improvements. There is no cost basis for comparison available at this time and cooperation between fewer property owners allowed for fewer projects to be incorporated into the fee program.

In the case of MASP storm drainage, some property owners will participate in a planned stormwater detention facility while others will provide on-site stormwater detention. These facilities will have direct costs and result in reduced land value as residential land is allocated to a detention facility as opposed to more housing. By contrast, in the Orcutt Area, most property owners will share costs and pay into a program to develop a regional stormwater detention facility, making more land available for development on each participating project site.

Summary of Cost Comparison

Overall, the strategy in the Orcutt Area (where there are many property owners with different interests and development potential) is to include as many facilities as possible within the fee program and leave as little as possible to future negotiations between developers of adjacent subdivisions. Although fees for residential development in the Orcutt Area are higher than those in the Margarita Area, there are two key reasons for this. The first is that there are more projects included in the Orcutt Area fee program that are not part of the Margarita Area fee program. The second is that the Margarita Area includes a substantial commercial component (70-acre Business Park) allowing costs to be shared among more rate payers.

At this time, City staff is recommending no change to the projects identified in the PFFP, the percentages of those projects that are the responsibility of the Orcutt Area to fund, or the financing strategies outlined to cover funding gaps. The PFFP appears to be a complete and adequate plan for funding public improvements in the expansion area.



Property Owner Input

Park Requirements

On June 18th, Andrew Merriam submitted a letter to the Planning Commission regarding the parkland requirements (Attachment 2). The points made in the letter are that City staff has recognized 1.5 acres of pocket parks and .5 acres of recreational benefit for the Railroad Safety Trail, which reduces the parkland deficit from 6.1 acres to about 4.0 acres. This would reduce the Park Mitigation Fee identified in Table ES-1 (Attachment 1) by about 33%. For background information on the Park Mitigation Fee, see Page 8 of the PFFP.

Mr. Merriam's letter further requests that the City recognize the value of the open space trail system and the creek corridors within the parks as equivalent to the 4.0 parkland deficit, which would eliminate the Park Mitigation Fee entirely. Alternatively, Mr. Merriam suggests that an additional four acres of land could be developed as a trail junction and picnic area at the base of Righetti Hill, which would provide for passive parkland and eliminate the requirement for the Park Mitigation Fee. Discussions between City staff and the property owners are on-going regarding these issues.

The Planning Commission may provide direction to staff on a preferred approach, however, additional information and site planning needs to be accomplished before staff is able to make a recommendation on this issue. Staff expects to make a final recommendation regarding parkland requirements to the Planning Commission on July 23rd, when resolutions are expected to be presented to the Planning Commission for deliberation and action.

Industrial Way Pedestrian/Bicycle Bridge

Pedestrian and bicycle paths constitute a major portion of the overall cost of public facilities in the Orcutt Area. The Industrial Way pedestrian/bicycle bridge draws attention in particular because of its cost – at approximately \$4 million, it is the most expensive transportation related project in the PFFP. On June 18th, a letter to the Planning Commission from Andrew Merriam, representing several property owners, details their concerns with the proposed bridge (Attachment 3).

The concerns expressed in the letter are based on the owner's belief that there would be little demand for a crossing at this location because the school will not be importing children from other neighborhoods, shopping at Marigold requires a car trip, Tank Farm and Orcutt offer better alternatives for cross-town trips, there is little recreational value to the connection and the bridge will be visually detracting to the neighborhood character.

Both the Planning Commission and the Bicycle Advisory Committee have confirmed the need for a grade-separated crossing at this location. The Bicycle Transportation Plan includes the crossing and the value of neighborhood connections is emphasized in the General Plan (LUE Policy 2.1.4). The purpose of the bridge is to facilitate movement between adjacent neighborhoods and to provide alternatives to single-occupant vehicle trips to area parks, schools, and shopping. The bridge is also a significant safety enhancement for the future neighborhood because it will reduce trespassing across the railroad tracks.



The owners are also concerned that the OASP is allocated 100% of the cost of the facility. The letter infers that if users from other neighborhoods, including the Margarita Area, would be using the bridge, then they should share in the costs.

It is the City's policy that each new neighborhood in the City pays for the facilities needed to serve it. In other words, if there were no residential development proposed in the Orcutt Area, then the need for a bridge to be constructed at that location would not exist. In addition, it is important to note that Orcutt Area property owners and future residents will be benefiting from facilities in the Margarita Area and in other parts of town that they will not be paying for, including Prado Road, the Damon-Garcia Sports Fields, the Bob Jones Bike Trail, and so on.

It is the residential component of the OASP that drives the need for the bridge. While others may use the bridge, future Orcutt Area residents will derive benefits from other facilities in the City that they will not have to pay for. This methodology is consistent with how the City has developed all of its new neighborhoods and specific plan areas.

Chapter Nine – Implementation

The following discussion highlights changes that are recommended to Chapter 9.

Section 9.1 – Environmental Review

This section is unnecessary because the Final EIR will be certified before the OASP is adopted. Section 9.1 can be deleted in its entirety. Environmental review information related to the Program EIR will be included in a new section as discussed under Section 9.9 below.

Section 9.2 – Annexation

The City has now received an application for annexation from 12 of the 13 property owners in the Orcutt Area. It is now expected that annexation of the entire Orcutt Area will be initiated at the time of specific plan approval. This section should be rewritten accordingly.

Section 9.4 - Phasing

No changes are necessary except that Table 9.1, referenced in this section, needs to be updated with the most current project list and phasing information.

Section 9.8 – Construction and Maintenance...

This section is unnecessary and in some cases contradicts provisions of Chapter 8, the PFFP. No development agreement is proposed, as mentioned in this section. The section can be deleted in its entirety.

Section 9.9 Amendment to the Specific Plan

The Interpretations and Adjustments sub-sections should be deleted in their entirety because interpretations and adjustments related to the OASP will occur under the direction of the Community Development Director to facilitate internal processing of permits under the specific plan. There is no need to elaborate on interpretations in the specific plan because this could



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create the assumption that there is a formal process for interpretations available to the public. In practice, if an interpretation or adjustment is significant enough that awareness needs to be created in the general public, then a specific plan amendment will be processed.

The Environmental Review sub-section should be promoted to its own numbered section and the section should be revised to discuss the Program EIR certified as part of the adoption of the OASP. The section should clearly state that all future subdivisions will be subject to environmental review, consistent with the Program EIR and the mitigation measures identified in Appendix C.

OASP Appendices

In general, changes to the appendices will be carried forward based on other changes made to the OASP as part of the public hearing process. Additional information to be added into the appendices includes adding the most recent Growth Management Ordinance Phasing Schedule to Appendix B and incorporating the "Facility Cost Estimates" from the PFFP into Appendix E.

ALTERNATIVES

1. The Planning Commission should continue consideration of Chapters Eight through Nine if there is not sufficient time to cover all of the material in one meeting.
2. The Planning Commission may direct other changes than those recommended by staff and listed in this report.

ATTACHMENTS

1. Public Facilities Financing Plan
2. Andrew Merriam Letter Re: Parkland Requirements
3. Andrew Merriam Letter Re: Ped/Bike Bridge at UP Railroad

Additional OASP Background Information:

<http://www.slocity.org/communitydevelopment/oasp.asp>



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GCG

GOODWIN CONSULTING GROUP

**ORCUTT AREA SPECIFIC PLAN
SAN LUIS OBISPO, CALIFORNIA**

PUBLIC FACILITIES FINANCING PLAN

Hearing Draft

MAY 21, 2008

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***Orcutt Area Specific Plan
San Luis Obispo, California
Public Facilities Financing Plan***

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EXECUTIVE SUMMARY

A. Project Description and Purpose of Report

The Orcutt Area Specific Plan (“OASP” or “Project”) is a primarily residential development project that is located in a currently unincorporated area of San Luis Obispo County, immediately southeast of the City of San Luis Obispo city limits. Approximately 892 to 979 housing units, and 16,500 square feet of non-residential land uses, are anticipated to be developed within the OASP by build-out of the Project. This Public Facilities Financing Plan (PFFP) describes the public facilities required to serve future development in the OASP area and identifies the total one-time burdens (impact fees) to be collected from each land use to fund these facilities on a pay-as-you go basis. Furthermore, estimated annual impact fee revenues are compared with estimated annual facility costs to determine if possible gaps in funding exist. Financing mechanisms that may be used to fill potential funding gaps, as well as implementation procedures that must be enacted by the City, are described in this PFFP.

B. Summary of Impact Fees

Various transportation, pedestrian and bicycle path, storm drainage, and park improvements are required. These project-specific improvements were designed and sized to serve the residential development in the OASP. The total cost for these improvements is estimated to be \$22.4 million. In addition to paying impact fees for project-specific costs, future development in the OASP is also expected to participate in the existing City-wide development impact fee programs for transportation, water, and sewer facilities. Lastly, the OASP will be subject to other impact fees for park mitigation, affordable housing, and Specific Plan and EIR preparation costs, as calculated in this analysis.

Table ES-1 at the end of the executive summary shows the project-specific, City-wide, and other fees for each residential land use within Zone 1 and Zone 2 of the OASP. Zone 2 includes properties that will not be subject to a storm drainage fee. These properties will be served by small, privately financed, on-site drainage basins rather than by the proposed regional detention basin for the Project. All other properties in the OASP are included in Zone 1. Total impact fees per unit are summarized below:

	<u>Zone 1</u>	<u>Zone 2</u>
Single Family	\$63,700	\$61,200
Multi-Family	\$46,000	\$44,800

It is important to note that the City has recently hired an appraiser to review the current land values in the OASP area. The specific impact fees in this PFFP that were calculated using land value estimates (park and recreation, park mitigation, and affordable housing) are subject to revision based on the outcome of the appraiser’s analysis.



It is also important to note that the one-time burdens for the OASP are in addition to in-tract improvements that are expected to be privately funded by the OASP developers; in-tract improvements are not addressed in this report.

C. Project Cash Flow

An estimated absorption schedule for the Project was created based on information from the City and the Specific Plan. Based on this schedule and facility phasing information also provided by the City, the Project's cash flow shows that \$9.5 million of the total \$22.4 million cost is required by the first year of development; this creates a substantial funding gap that cannot be filled by fee revenues. In addition, it is estimated that there will be positive cash flows in some years and negative cash flows in others; however, there will be a total cumulative net deficit in funding each year until the last two years of development.

Assuming that the \$9.5 million of up-front costs are funded by land-secured debt financing through a Community Facilities District, the number of years of cumulative net deficits is reduced to two. Furthermore, the new projected funding deficits are relatively small in size and, since absorption and phasing assumptions may change over time, it is possible that these minor funding deficits could even be avoided. The analysis at this planning level is intended to be conservative. In fact, as impact fee revenue accumulates in funds or accounts at the City, it will likely earn interest and the interest earnings could be sufficient to cover the modest deficits. Financing mechanisms, including land-secured debt financing, are discussed in Chapter 5 in this report.



**TABLE ES-1
TOTAL PROJECT-SPECIFIC INFRASTRUCTURE PLUS CITY-WIDE AND OTHER FEES**

Land Use	Project-Specific Impact Fees					City-Wide Impact Fees					Other Impact Fees					Total Gross Fees per Net Acre
	Trans- portation	Pedestrian and Bicycle Paths	Storm Drainage	Parks & Recreation	Total Project- Specific Impact Fees	Trans- portation Impact Fee	Water Impact Fee	Sewer Impact Fee	Total City-Wide Fees	Park Mitigation	Affordable Housing	Specific Plan and EIR Fee	Total Other Fees	Total Gross Fees per Unit		
Zone 1																
Residential Single Family	\$6,218	\$5,843	\$2,472	\$13,368	\$27,900	\$3,093	\$15,292	\$6,672	\$25,057	\$5,745	\$3,610	\$1,401	\$10,756	\$63,713	\$366,511	
Multi-Family	\$4,344	\$4,082	\$1,151	\$9,948	\$19,524	\$2,745	\$12,234	\$5,338	\$20,317	\$4,275	\$1,353	\$525	\$6,153	\$45,994	\$710,532	
Zone 2																
Residential Single Family	\$6,218	\$5,843	n/a	\$13,368	\$25,429	\$3,093	\$15,292	\$6,672	\$25,057	\$5,745	\$3,610	\$1,401	\$10,756	\$61,242	\$47,001	
Multi-Family	\$4,344	\$4,082	n/a	\$9,948	\$18,374	\$2,745	\$12,234	\$5,338	\$20,317	\$4,275	\$1,353	\$525	\$6,153	\$44,844	\$805,523	



INTRODUCTION

A. Objective

This report analyzes the public facilities burden that must be carried by the land uses proposed in the Orcutt Area Specific Plan (“OASP” or “Project”) and presents a financing strategy to fund that burden. The burden consists of infrastructure and related costs necessary to serve the Project plus development impact fees that would be imposed on the Project for other City-wide capital improvements. The burden does not include in-tract improvements for the OASP; it is expected that these costs will be privately funded by the OASP developers.

In summary, this Public Facilities Financing Plan (PFFP) does the following:

- Summarizes the proposed land uses in the OASP
- Describes public facilities required to serve future development in the OASP area
- Presents the costs of required public facilities and allocates the costs to the proposed land uses
- Identifies the total one-time burdens (impact fees) to be collected within the Project area to fund facilities on a pay-as-you-go basis
- Outlines the phasing of public facilities needed to keep pace with projected development
- Projects annual cash flows comparing revenues (impact fees) against expenses (public facilities) and reveals possible funding gaps
- Describes the financing mechanisms that may be used to fill potential funding gaps
- Summarizes the implementation measures that must be enacted by the City

B. Project Description

The Orcutt Area Specific Plan encompasses approximately 231 acres and is situated in the County of San Luis Obispo immediately southeast of the City of San Luis Obispo city limits. The Specific Plan area is bounded by Tank Farm Road to the south, Orcutt Road to the east and north, and the Union Pacific Railroad to the west. Righetti Hill, one of the City’s natural landmarks, is situated in the southern portion of the area. There are currently 13 property owners within the OASP and a total of 21 parcels, one of which has already been annexed into the City. A location map from the Specific Plan dated June 2006 is shown on the following page.



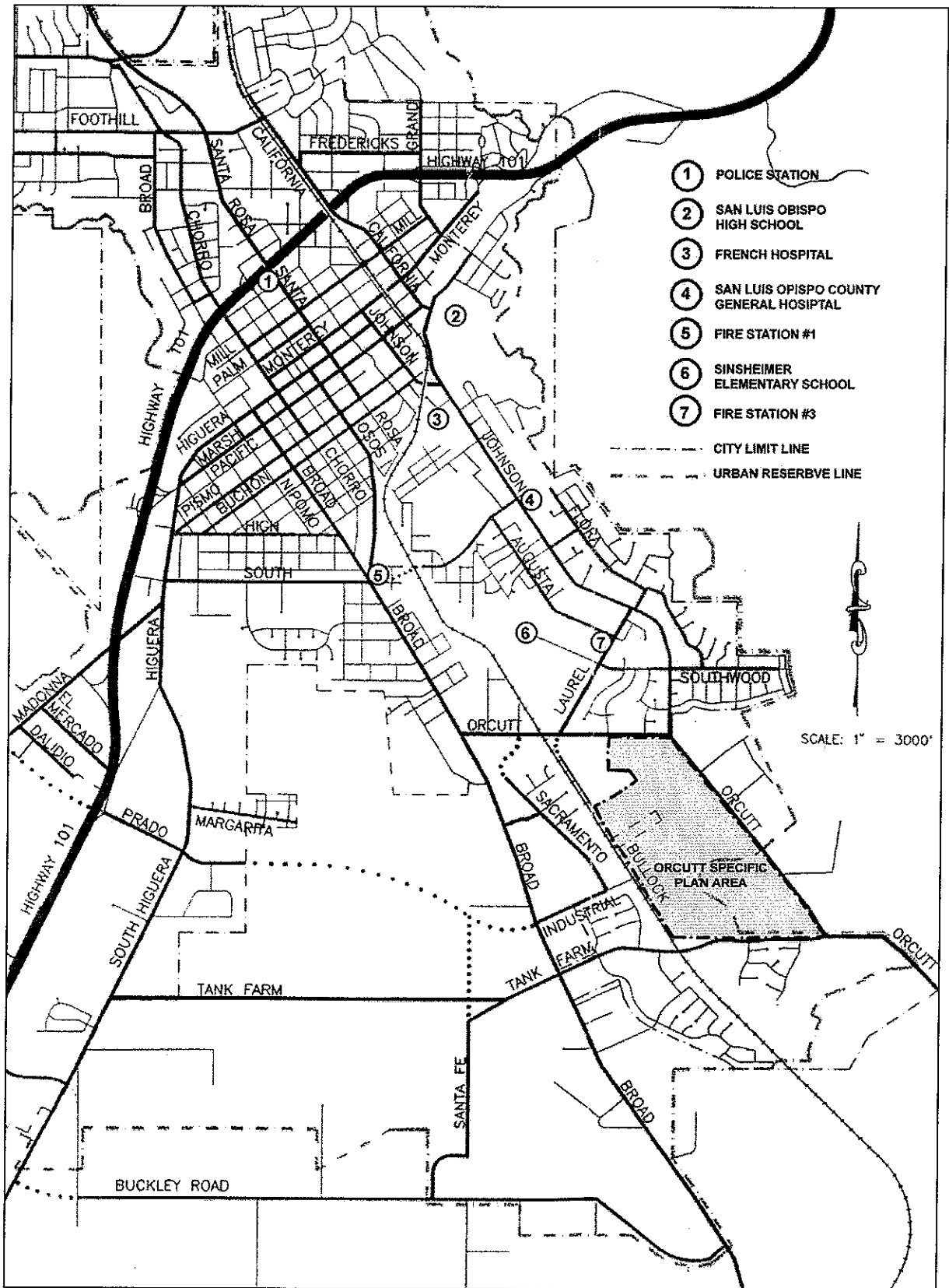


FIGURE 1.1 SITE LOCATION MAP



At build-out, the OASP is expected to develop between 892 and 979 residential units, which will produce approximately 2,000 residents, and 16,500 square feet of non-residential land uses on a total of 114 acres. The Project is predominantly residential and will include low density residential (R-1), medium density residential (R-2), medium high density residential (R-3), and high density residential (R-4) units. For purposes of this analysis, low and medium density units are categorized as single family residential, and medium high and high density units are categorized as multi-family residential. Regarding non-residential land uses, approximately half an acre is designated for a pedestrian-oriented shopping area that will provide a range of retail sales, personal service establishments, and selective office uses. An additional 103 acres of parks, open space, and detention ponds, as well as 14 acres of arterial, collector, and major local roads, are anticipated in the Project. Table 1 in Appendix A summarizes the OASP land uses that are factored into the analysis presented in this PFFP.

The land uses have been separated into two zones. Zone 2 includes properties that will not be subject to a storm drainage fee; all other properties in the OASP are included in Zone 1. The Zone 2 properties will be served by small on-site drainage basins that will be privately financed, rather than by the proposed regional detention basin for the OASP. These zones, as well as the storm drainage facilities that will serve them, are discussed in more detail in Chapter 2 of this report.

Lastly, the infrastructure required to serve the Project, as described in this report, was sized based on the maximum amount of housing units. However, for purposes of calculating the facilities burden, this report uses the approximate mid-point of 937 units to account for the fact that residential properties may not be developed at their maximum densities.



FACILITY NEEDS AND COST ESTIMATES

The Orcutt Area Specific Plan describes in detail the water, wastewater, storm drainage, roads, parks, and miscellaneous improvements proposed to meet the needs of the community. The City currently has a development impact fee program in place that will fund the water and wastewater improvements and some of the road improvements for the Project. These City-wide fees will be discussed in more detail in Chapter 3 of this report, where the Project-specific fee program and other fees are covered. The remaining Project-specific costs for roads, bridges, pedestrian and bicycle paths, storm drainage, and parks and recreation that are not covered by existing development impact fees are the focus of this study and are presented in Appendix B of this report. The total cost for these improvements required for the OASP is estimated to be \$22.4 million.

Table 2 in Appendix A summarizes the cost information for each facility category. Certain infrastructure items within the transportation and pedestrian and bicycle path categories are regional in nature and will serve other future development areas outside the OASP. Both the gross costs and net costs allocated to the OASP are shown. A summary of the net infrastructure costs to serve the OASP development is presented in the following table.

TABLE A
INFRASTRUCTURE COST ESTIMATES

Improvement	Total Cost
Transportation	\$5,050,000
Pedestrian and Bicycle Paths	\$4,746,000
Storm Drainage	\$1,460,000
Parks and Recreation	\$11,110,000
Total	\$22,366,000

A. Transportation Improvements and Pedestrian and Bicycle Paths

The circulation plan for the Project provides direct connections between the existing arterials (Orcutt Road and Tank Farm Road) and the new roads within the OASP. Bicycle and pedestrian circulation routes will provide access throughout the interior of the Project and will connect to the existing pedestrian and bicycle network outside the Orcutt area. The following is a list of circulation system projects required to serve the OASP:

- Orcutt Road / Tank Farm Road improvements
- Broad Street / South Street – Santa Barbara Road improvements
- Broad Street / Tank Farm Road second southbound left turn lane and a second northbound left turn lane
- Orcutt Road / Johnson Avenue improvements
- Broad Street / Prado Road extension and second northbound left turn lane



- Orcutt Road widening – Broad to Laurel
- Bullock Lane realignment
- Relocation of Hanson Road or reducing the grade on Orcutt at Hanson Road
- Transit stops (5)
- Orcutt expansion area bridges – A, B, and C
- Pedestrian and bicycle paths
- Pedestrian / bike overpass
- Bike path extension over Tank Farm Road

The total cost for street and bridge improvements is estimated to be approximately \$6.6 million and the Project's fair share of these improvements is estimated to be \$5.1 million. An additional \$4.7 million is anticipated for the OASP's fair share of pedestrian and bicycle paths, which are estimated to cost a total of \$5.0 million. Costs include site preparation, earthwork, hardscape, traffic markings, and miscellaneous improvements.

B. Storm Drainage Improvements

The OASP is located within the watershed of the East Branch of San Luis Obispo Creek and has two distinct drainage sub-areas. The Upper Fork East Branch San Luis Obispo Creek Watershed (UFEBSCO) consists of the southeastern portion of the OASP and drains to the southwest into the east branch of the San Luis Obispo Creek. The Orcutt Creek Watershed consists of the northwestern area of the OASP and drains to the southwest into Orcutt Creek. Both creeks ultimately are tributary to the San Luis Obispo Creek. The drainage plan proposed for the OASP includes a regional detention basin to detain storm water generated by development within the UFEBSCO. Smaller on-site drainage basins are proposed to detain storm water generated by development within the Orcutt Creek Watershed. These smaller basins are considered in-tract improvements for the Project and will be funded by developers. Therefore, they are not included in the cost estimates of this report. Furthermore, the properties that will be served by the smaller on-site drainage basins will not be required to pay the regional detention basin fee as calculated in this study; these properties have been identified as Zone 2, as shown in Table 1 of Appendix A. All other properties in the OASP are included in Zone 1. A map that identifies the properties in Zone 1 and Zone 2 is presented on the following page.

Approximately \$1.5 million is included in the cost estimates for the regional storm drainage facilities, including landscaping, fencing, and storm drain system outlets. The basin will encompass approximately 7.5 acres of land.

C. Parks and Recreation Improvements

The Orcutt Area Specific Plan provides for approximately 14.3 acres of parkland. A proposed neighborhood park located at the center of the Project will serve as a community gathering place for casual recreation and sporting events by providing a variety of active recreation facilities. In addition, a linear park is proposed that will serve a dual purpose as both an area wide detention basin and a recreation area, and a smaller pocket park is planned within the low and medium density residential neighborhoods. It is anticipated that acreage for the parks will be dedicated to





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the City during the first phase of development. The following list summarizes the parks and recreation projects planned to serve the Project:

- Central Neighborhood Park – 12.6 Acres
- Pocket Park – 0.5 Acre
- Linear Park System – 1.2 Acres

The total cost of park and recreation improvements to be funded by the Project is estimated to be approximately \$11.1 million. Of that amount, \$6.7 million relates to the estimated value of the land that will be dedicated to the City. It is anticipated that property owners who dedicate land for parks and recreation will be reimbursed for costs that exceed their fair share.

The estimated land value of \$6.7 million is currently being reviewed by an appraiser. The land costs and the associated development impact fees calculated in this report are subject to revision based on the outcome of this review.



OASP FEE PROGRAM AND OTHER FEES

Assembly Bill 1600 (herein “AB 1600”), which was enacted by the State of California in 1987, created Section 66000 et seq. of the Government Code. In order to establish, increase, or impose a fee as a condition of approval of a development project, AB 1600 (also known as the Mitigation Fee Act) requires a public agency to specifically identify the public facilities funded by the impact fees, and determine how there is a reasonable relationship, or “nexus,” between the type of development project and the need for the facilities, the cost of the facilities, and the need to impose a fee.

Development impact fees are monetary exactions (as opposed to taxes or special assessments) that are charged by local agencies in conjunction with approval of a development project. The fees are paid by builders or developers, typically at the time a building permit is issued. Impact fees are levied for the purpose of defraying all or a portion of the costs of a public facility, improvement, or amenity that benefits the project. The collection of impact fees does not require formation of a special district; an impact fee program is implemented by a public agency’s adoption of a resolution or ordinance.

Impact fees will be an important component of this PFFP. Once the Project area is completely annexed into the City, a fee ordinance must be adopted by the City and the City’s existing public facilities fee program must be updated prior to development of the Orcutt Area Specific Plan; the fee program may also be updated and revised as part of future development phases. Because fees are collected as development occurs and some of the facilities identified in this report are expected to be in place prior to development or early in the build-out of the OASP, fees will likely be levied in future years to reimburse developers that have paid to cover more than their fair share of project costs prior to the availability of fee revenues.

A. Proposed Orcutt Area Specific Plan Fee Program

The primary source of funding for project-specific improvements will be the proposed Orcutt Area Specific Plan Fee Program. In order to fairly allocate facility costs funded by the fee program among land uses within the OASP, it is necessary to use factors that relate the amount of benefit a land use will derive from a given capital facility relative to that of other land uses. Table 3 of Appendix A outlines the appropriate benefit unit classification used for each facility, along with the individual factors associated with the different land uses. The individual factors for transportation, pedestrian and bicycle paths, and storm drainage improvements are consistent with those documented in the OASP draft transportation impact analysis and the SLO Creek drainage design manual. Park and recreation improvements are allocated to the residential land uses based on the number of residents served.

As previously mentioned, the public facilities identified in this analysis were designed and sized to serve the residential development in the OASP since the proposed commercial uses are such a minor part of the total Project, representing less than one-half of 1% of the net developable acreage. Although a very small amount of non-residential development is also anticipated, the



cost of public facilities is not allocated to these commercial land uses since they may be developed only as a result of the demand created by the residential development.

Tables 4 through 7 of Appendix A show the cost allocation process for each infrastructure category. For example, Table 4 shows the cost allocation process for transportation improvements. The benefit unit, expressed as daily trips, is multiplied by the number of residential dwelling units for each residential category, producing the total number of trips per land use. The percentage of trips for each land use relative to the total is calculated and used to allocate the total facility cost among the land uses. For example, single family residential development accounts for 64.4% of the total trips. This percentage is multiplied by the total cost of \$5.1 million for transportation improvements in the OASP to produce a total burden of \$3.3 million for single family residential. Dividing this total burden by the quantity of land use (523 units) produces a cost of \$6,218 per dwelling unit for single family residential development, and the amount per unit for multi-family residential development is also shown in Table 4. Similar calculations are shown for pedestrian and bicycle paths, storm drainage, and parks and recreation costs in Tables 5 through 7.

A summary of the project-specific costs calculated in Tables 4 through 7 is provided in Table 8. Table 8 shows the total facility cost for the OASP along with the burden allocated to each land use. The table below summarizes the gross project-specific fees from Table 8 calculated for Zone 1 and Zone 2. As previously mentioned, the properties in Zone 2 are not subject to a fee for the regional detention basin. Also note that these gross project-specific fees are subject to change based on the outcome of an appraiser's review of current land values in the OASP area.

TABLE B
PROJECT-SPECIFIC COST SUMMARY
ZONE 1 AND ZONE 2

Land Use	Gross Project-Specific Fee
Zone 1	
<i>Residential (per unit)</i>	
Single Family	\$27,900
Multi-Family	\$19,500
Zone 2	
<i>Residential (per unit)</i>	
Single Family	\$25,400
Multi-Family	\$18,400



B. Existing Development Impact Fee Programs

Development in the OASP is expected to participate in the existing City-wide development impact fee programs for transportation, water, and sewer facilities. These fees are in addition to the gross project-specific fees discussed above and will fund the Project's fair share of City-wide public facility costs. Note that there is no transportation infrastructure incorporated into the project-specific fees that is duplicated in the City-wide fees.

The City-wide development impact fees for each land use category are shown in Table 9 of Appendix A. A summary of the City-wide fees applied to a single family unit is provided below:

**TABLE C
CITY-WIDE FEES PER SINGLE FAMILY UNIT**

Facility Type	Fee per Single Family Unit
Transportation	\$3,100
Water	\$15,300
Wastewater	\$6,700
Total City Fees	\$25,100

The wastewater facility fee shown in Table C includes two components: (i) the City-wide wastewater fee; plus (ii) an area-specific add-on fee related to wastewater infrastructure designed specifically to serve the OASP.

C. Park Mitigation Fee

As previously mentioned, the OASP will provide 14.3 acres for neighborhood, pocket, and linear parks. The City Parks and Recreation Element requires a minimum of 10 acres of parkland per 1,000 residents, or approximately 20.4 acres for the OASP based on expected population. Land acquisition and improvement costs for the remaining 6.1 acres will be funded through the park mitigation fee. The total cost is estimated to be \$4.8 million, or approximately \$777,000 per acre. The cost is allocated to the residential land uses on a per resident served basis, in the same manner that project-specific parks and recreation costs are allocated. The park mitigation fees per unit are shown in Table 9 of Appendix A.

D. Affordable Housing Fee

The City's General Plan Land Use Element stipulates that specific plans for major residential expansion areas include sites suitable for affordable, low-income rental and owner-occupied housing. In addition, the City has adopted an inclusionary housing program that requires all new development projects to build affordable housing units, dedicate land for affordable housing, or pay an in-lieu fee to increase affordable housing opportunities City-wide. In residential



annexation areas such as the OASP, at least 5% of the new housing must be rented or sold at prices affordable to low income households. Another 10% of the new housing must be available for moderate income households. Based on the 937 expected units within the OASP, approximately 141 units must be affordable. The anticipated break down of affordable units and acreage is shown in the table below.

**TABLE D
AFFORDABLE HOUSING IN THE OASP**

Residential Land Use	Net Acres	Units per Acre	Total Units
Low Density (R-1)	5.2	5	25
Medium Density (R-2)	3.4	8	26
Medium High Density (R-3)	5.1	15	79
High Density (R-4)	0.6	18	11
Total	14.3		141

For the OASP, it is expected that landowners will meet the City's affordable housing requirements by building the moderate income affordable units within market rate subdivisions in the Project area, and by dedicating 2.81 acres of improved land to the Housing Authority for development of the low income affordable units. The landowner dedicating the improved land for the low income affordable units will be reimbursed for land and improvement costs that exceed his fair share. The value of improved land (ready for development with in-tract improvements in place) related to this property is estimated to be \$2.5 million, or \$20 per square foot. This cost is spread equally to the residential land uses in the OASP on a per acre basis, resulting in a fee of \$21,600 per acre. This amount is translated into a fee per residential unit based on the density assumptions shown in Table 1 of Appendix A. Pursuant to the City's inclusionary housing policy, non-residential projects are exempt from the affordable housing requirements. The affordable housing fees per unit are shown in Table 9 of Appendix A.

Pursuant to the Specific Plan, developers who do not include the moderate income affordable units in their developments will be required to pay an affordable housing in-lieu fee equal to 10% of home construction costs, and those developers that build more than their required share will be reimbursed with the fees collected from other OASP developers who build less. This affordable housing in-lieu fee is not included in this study based on the assumption that each developer will build its share of moderate income affordable units.

E. Specific Plan Fee

New development in the Orcutt Area Specific Plan will also be subject to a fee that will be used to reimburse the City and certain land owners for Specific Plan and EIR preparation costs. The total cost of \$950,000 is spread equally to the residential land uses on a per acre basis, resulting in a fee of \$8,385 per acre. This amount is translated into a fee per residential unit based on the



density assumptions shown in Table 1 of Appendix A. The Specific Plan and EIR fees for each land use designation are shown in Table 9 of Appendix A.

F. Summary of Impact Fees

The project-specific, City-wide, and other fees are presented in Table 10 of Appendix A and are added together to show the total gross burden by land use on a per-unit and per-acre basis. A portion of the OASP has the potential to develop as a school instead of residential. The fees for residential are shown both per unit and per acre to (i) ensure that the amount of expected fee revenue will be maintained and (ii) to document the school’s infrastructure obligation, or burden, so that it can be considered in a possible land sale transaction between the school district and the land owner. The table below summarizes the total gross burden by land use for the OASP.

The total costs used to determine the park mitigation fee (Section C above) and affordable housing fee (Section D above) may be revised to reflect the outcome of an appraiser’s review of current land values in the OASP area. Therefore, the total gross fees shown below are subject to change.

**TABLE E
TOTAL GROSS FEES PER UNIT OR NET ACRE**

Land Use	Gross Fees per Unit	Gross Fees per Net Acre
Zone 1		
<i>Residential (per unit)</i>		
Single Family	\$63,700	\$366,500
Multi-Family	\$46,000	\$710,500
Zone 2		
<i>Residential (per unit)</i>		
Single Family	\$61,200	\$472,500
Multi-Family	\$44,800	\$805,500



FACILITY PHASING AND PROJECT CASH FLOW

A. Absorption Assumptions

Development in the OASP is anticipated to occur in three phases. Based on information provided in the Specific Plan and input from the City, an estimated absorption schedule that is also consistent with the City's Growth Management Phasing Schedule for the Orcutt area was created. Phase 1 of the Project is assumed to have a five-year absorption horizon, and both Phases 2 and 3 are assumed to develop over the subsequent three-year time periods.

While actual absorption rates will vary, these projections provide a useful schedule to estimate the timing of fee revenue and facility phasing. The annual and cumulative absorption assumptions are presented in Tables 11 and 12 of Appendix A.

B. Facility Phasing

Certain facilities will be required up-front while others may be installed as development progresses. The majority of the facility phasing is linked to residential development; for example, the Orcutt Road/Tank Farm Road transportation improvements are required to be completed prior to the development of the 237th unit. Up-front facilities include the regional detention basin, parkland acquisition and a portion of the park improvements, construction of the Orcutt expansion area bridge A, and one transit stop. Other facilities, such as the Broad Street/Prado Road extension, will be constructed as impact fee revenues become available, which is not expected to occur until the last couple of years of Project development.

Table 13 in Appendix A delineates the phasing assumptions for the OASP facility costs and Table 14 presents the annual costs based on those assumptions.

C. Project Cash Flow

The first section of Table 15 in Appendix A compares the phasing of facility costs to the timing of fee revenues for each cost category and in total, assuming no debt or other forms of financing. The \$9.5 million of total up-front costs required in year one creates a substantial funding gap that cannot be filled by fee revenues. In addition, based on the absorption and phasing assumptions discussed above, there will be positive cash flows in some years and negative cash flows in others; however, it is estimated that there will be a total cumulative net deficit in funding each year until the last two years of development. In these last two years, fee revenues will be available for the Broad Street/Prado Road extension, the pedestrian and bicycle paths, and for reimbursements to Orcutt Associates, LLC for the Orcutt Road widening project, without causing the cumulative net deficit to increase.

Lump-sum financing will be required for the improvements that will be needed when development begins and possibly at specific points in the development cycle when fee revenue



may not adequately support the total cost of the facilities. The last section of Table 15 adjusts the revenue and cost comparison by assuming that the \$9.5 million of up-front costs are funded by land-secured debt financing through a Community Facilities District (described in Chapter 5). Less revenue is generated from development impact fees because credits against the transportation, regional detention basin, and parks and recreation per-unit and per-acre fees would be granted to offset the amount of infrastructure that is debt-financed. Based on the infrastructure that would be bond-financed in the first year, a partial credit would apply to transportation (\$690,000 of \$5.1 million), a full credit would apply to the regional detention basin, and a partial credit would apply to parks and recreation (\$7.3 million of \$11.1 million).

By introducing a land-secured financing mechanism, the number of years of cumulative net deficits is reduced to two. Furthermore, the new projected funding deficits are relatively small in size and, since absorption and phasing assumptions may change over time, it is possible that these minor funding deficits could even be avoided. The analysis at this planning level is intended to be conservative. In fact, as impact fee revenue accumulates in funds or accounts at the City, it will likely earn interest and the interest earnings could be sufficient to cover the modest deficits projected at the bottom of Table 15. Financing mechanisms that would be appropriate for the OASP, including land-secured debt financing, are discussed in detail below in Chapter 5.



OTHER FINANCING MECHANISMS

The development impact fees calculated in this report reflect the amount required per land use to fund facilities on a pay-as-you-go basis. However as discussed in the last section of this report, some facilities are required before fee revenues are available, causing funding gaps. Viable financing mechanisms that are available to fund these gaps are discussed in this section.

A. Developer Equity

When other funding mechanisms are deemed infeasible, inapplicable, or are otherwise undesired, the solution is often developer equity. The fee program will be designed to cover all of OASP facility costs, but due to the timing of infrastructure needs relative to the availability of fee revenue, some developer equity or other source of private financing may be required.

B. Mello-Roos Community Facilities Act of 1982

The Mello-Roos Community Facilities Act (the "Act") [Section 53311 et seq. of the Government Code] was enacted by the California State Legislature in 1982 to provide an alternate means of financing public infrastructure and services subsequent to the passage of Proposition 13 in 1978. The Act complies with Proposition 13, as well as the more-recently passed Proposition 218, and permits cities, counties, and special districts to create defined areas within their jurisdiction and, by a two-thirds vote within the defined area, impose special taxes to pay for the public improvements and services needed to serve that area. The Act defines the area subject to a special tax as a Community Facilities District (CFD).

A CFD may provide for the purchase, construction, expansion, or rehabilitation of any real or other tangible property with an estimated useful life of at least five years. A CFD may also finance the costs of planning, design, engineering, and consultants involved in the construction of improvements or formation of the CFD. The facilities financed by the CFD do not have to be physically located within the CFD. The facilities that can be financed by a Mello-Roos CFD include, but are not limited to, the following:

- Roads, water and sewer lines, flood control channels
- Local park, recreation parkway, and open-space facilities
- School sites, structures, furnishings, and equipment
- Libraries
- Child care facilities
- Utility improvements (limited to five percent of bond proceeds if improvements are to be taken over by a non-publicly owned utility agency)
- Any other governmental facilities which the legislative body creating the CFD is authorized by law to contribute revenue to, construct, own, or operate



A CFD may also pay for public services, including the following:

- Street maintenance
- Police protection
- Fire protection
- Recreation program services
- Library services
- Park and open space maintenance
- Flood and storm protection services
- Removal or cleanup of hazardous substances
- Sandstorm protection
- Seismic retrofitting
- School facilities maintenance

A CFD may only finance the services mentioned above to the extent that they are in addition to those provided in the area before the CFD was created and may not supplant services already available within that area.

There are two limitations on the amount of the financing available from a CFD. The first is the value-to-lien-ratio. "Value" is considered to be the appraised value of the property, including entitlements and improvements in place on the date the CFD bonds are to be sold. The value of improvements to be constructed with bond proceeds is included in the value calculation. "Lien" refers to the proposed Mello-Roos bond issue, as well as any other public financing debt secured by the property. Senate Bill 1464, which became effective January 1993, requires a minimum value-to-lien ratio of 3-to-1.

The second restriction on the amount of financing available from a CFD is the total effective tax rate (ETR) paid by a homeowner or property owner in the CFD. The ETR consists of the basic one percent ad valorem property tax levy mandated by Proposition 13, plus overrides from voter-approved bonded indebtedness and non-ad valorem taxes, assessments, and parcel charges (expressed as a percentage of market value). Market value can be determined based on input from local developers, a market consultant, local realtors, or an appraiser.

There is no legal limit, but a maximum ETR of 2.00% of market value has evolved as a standard for residential development in many areas throughout the State, although it tends to be closer to 1.75% (approximately 0.25% lower) in northern California. It is thought that ETRs higher than these amounts may lead to market resistance by prospective homebuyers, or potential "taxpayer revolts" by overburdened homeowners. The maximum supportable ETR for a given project should also consider the maximum tax rates paid by homes in competing projects in the area and, based on the strength of the real estate market, the demand for homes in general. Commercial/industrial projects are even more sensitive to the annual burdens of competitive projects in the regional marketplace. However, a property owner is able to spread the tax burden among many tenants and, therefore, has different issues to consider than a homeowner.

Formation of a CFD authorizes a public agency to levy a special tax on all taxable property within the CFD in the manner prescribed in the formation documents. Property owned or



irrevocably offered to a public agency may be exempted from the special tax. Mello-Roos special taxes are collected at the same time and in the same manner as property taxes, unless otherwise specified by the agency. Special tax revenues may be used to pay debt service on bonds sold or may also be used to pay directly for facilities and public services.

Mello-Roos bonds can be short- or long-term obligations. Typically, long-term bonds have either a twenty-five or thirty year maturity. Short-term notes or bonds can be issued to provide interim funding; these obligations are then retired when another source of revenue becomes available.

C. 1913/1915 Act Assessment Bonds

Implementing a Special Assessment District (AD) involves using the Municipal Improvements Act of 1913 to initiate proceedings for the formation of an AD and the Improvement Bond Act of 1915 to issue bonds. These Acts provide mechanisms for issuers to construct or acquire public improvements, to apportion the costs through liens against the properties in a designated area which directly benefit from the improvements (the district), and to finance the costs through the issuance of tax-exempt bonds.

Public works improvements are eligible for AD financing to the extent that properties within the district receive a special, measurable, local, and direct benefit from such improvements. Traditionally, improvements to be financed using an AD include, but are not limited to, streets and roads, water, sewer, local drainage facilities, utility lines, and landscaping. Other types of public improvements which have a "regional" significance (e.g., major roads, bridges, flood control facilities) are only partially eligible, based on the proportion of benefit from the improvements that can be assigned to parcels within the AD. Typically, items of general benefit to a community, such as schools, fire stations, and parks, have not been eligible for AD financing.

The formation of an AD is initiated through either a petition submitted by sixty percent of the landowners in a proposed AD, or through the adoption of a Resolution of Determination and the preliminary approval of an investigative report by the City Council. The City then adopts a Resolution of Intention that designates the boundaries of the proposed AD, describes the proposed improvements, orders the issuance of bonds, and declares the City's intention to levy the assessments. This resolution must include an engineer's report that includes the proposed assessment diagram, which is used to determine the assessment levied against each property.

Pursuant to Proposition 218, each landowner must be sent a notice of public hearing and a ballot that identifies the amount of assessment assigned to his/her parcel. The owner is directed to return the ballot indicating their support or opposition to the assessment. At the public hearing, the agency must determine if a majority protest exists. If ballots submitted in opposition to the assessment exceed the ballots submitted in favor, the agency must abandon the assessment proceedings. In determining whether a majority protest exists, the ballots are weighted based on the amount of assessment assigned to each parcel.



Subsequent to the confirmation of assessments, a thirty-day cash payment is established during which any property owner can pre-pay his assessment. After this thirty-day period, bonds may be sold for all unpaid assessments in the newly-formed AD.

Each parcel of property within an AD is assessed a portion of the costs of the public improvements and services to be financed by the AD based on the proportion of benefit received by that parcel. Assessment liens are levied at the time of formation of the AD and installment payments are collected along with property taxes on a semi-annual basis.

Limitations on the timing and amount of financing available through an AD are similar to the limitations for Mello-Roos, as discussed above. A minimum 3-to-1 value-to-lien ratio is usually required, and a reserve fund must be established to provide for timely debt service payments, regardless of delinquencies. It may be feasible to estimate the total ETR based on the anticipated land uses for each parcel. However, because the assessment becomes a fixed amount on that parcel, if the land uses ultimately developed are different than anticipated, the actual ETR could be much higher than 1.75% to 2.00% of market value.



IMPLEMENTATION PLAN

The Orcutt Area Specific Plan identifies a program for significant residential growth, and limited non-residential growth, within the City of San Luis Obispo and will be subject to updates and revisions in future years as development applications are submitted and processed.

The Specific Plan and the PFFP are based on assumptions of land use, facility demands, facility standards and design, and cost estimates. Each of these assumptions may be subject to change in future years; therefore, the PFFP may also be revised to reflect these changes. The ongoing implementation of the PFFP will be parallel to the continued monitoring of the Specific Plan, and will require the same degree of time and effort to keep it current and useful. In this manner, the PFFP will guide the overall funding of community infrastructure required to serve the Specific Plan. Following is a summary of many of the tasks associated with implementation of the PFFP.

A. Updates and Revisions

As noted above, changes are likely to occur in facility plans, land use plans, or cost estimates. When these items are revised, there will be a corresponding change in the fair share cost allocation to each land use in the OASP. Land use and facility changes will result in revisions to the benefit analysis and corresponding cost allocation to each land use. To the extent some projects in the OASP will have been developed and will have paid their fair share as defined at the time they were built, revisions will apply only to future new development. If facility costs are determined to be higher than estimated in the PFFP, the City will need to increase fees in future years and, if applicable, call on developers to fund the extra expenses that relate to CFD financing through the provisions of an acquisition agreement.

As the City will adopt new ordinances or update existing ordinances on an ongoing basis, fees will be adjusted based on actual costs realized after construction bids have been received for public facilities. If actual costs are higher than expected, again, the City will have to increase fees and/or rely on the terms of an acquisition agreement to avoid a financing deficit in future years.

B. Action Items

Prior to commencement of development in the Specific Plan, the City will need to adopt a fee ordinance or resolution implementing a Specific Plan fee program for each type of capital facility. The initial ordinance will reflect fees based on information available at that time. Fees will be adjusted annually or on a more frequent basis to reflect actual costs and current cost estimates.

Pursuant to Section 66006 of the Government Code, the City will establish a separate Specific Plan capital facility account and a unique fund for each type of public facility for which fees are collected. Establishment of this account will prevent commingling of the Specific Plan fees with other City revenues and funds. Interest income earned by fee revenues in this account will be



deposited in the account and applied to facility construction costs. Within one hundred eighty (180) days of the close of each fiscal year, the City will make information pertaining to the account [as required by Section 66006 (b)(1)] available to the public and will review this information at a regularly scheduled public hearing.

In order to maximize the efficiency of the capital improvements program, the City may borrow money from one fund within the Specific Plan account to pay for facilities financed by another fund within the account. This borrowing will occur when one type of facility is needed immediately, while another type is not needed for a number of years. The City will monitor such borrowing on an ongoing basis and will repay funds from which fee revenues were borrowed in a timely manner and in an amount equal to the original amount borrowed plus the interest that would have accrued had the money not been borrowed from the fund.

In addition, if the developer requests formation of a Mello-Roos CFD and the City concurs with that request, the City must form a financing team made up of experts in the various fields associated with implementation of such districts, including bond counsel, bond underwriter, and special tax consultant. The City and the designated financing team will be responsible for forming the district, issuing bonds to pay for required facilities, and levying special taxes to ensure timely repayment of bonds.



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APPENDIX A

PUBLIC FACILITIES FINANCING PLAN TABLES



Table 1
City of San Luis Obispo
Orcutt Area Specific Plan Public Facilities Financing Plan
Land Use and Demographic Assumptions

Land Use	Net Acres¹	Units per Acre	Total Units	Persons/ Household²	Total Population
Zone 1³					
<i>Residential</i>					
Single Family	77.0	6	443	2.46	1,090
Multi-Family	20.5	15	317	1.83	580
Subtotal	97.5		760		1,670
<hr/>					
Land Use	Net Acres¹	Units per Acre	Total Units	Persons/ Household²	Total Population
Zone 2³					
<i>Residential</i>					
Single Family	10.4	8	80	2.46	197
Multi-Family	5.4	18	97	1.83	178
Subtotal	15.8		177		374
<hr/>					
All New Development			Zone 1	Zone 2	Total
Acres			97.5	15.8	113.3
Residential Units ⁴			760	177	937
Population			1,670	374	2,044

¹ Net acres excludes the acreage of arterials, collectors, and major local roads. The residential net acreage includes mixed use residential.

² The population per household assumptions in the Specific Plan have been adjusted to reflect a weighted average of 2.18, which is consistent with the CA Department of Finance's estimate for the City of San Luis Obispo as of January 2007.

³ Zone 2 includes the Farrior, Hall, Maddalena, and Mid-State properties that will not be subject to the regional storm drainage fee. All other properties in the OASP are included in Zone 1.

⁴ The projected number of units for the OASP is between 892 and 979 units. The mid-point of this range is used in this analysis.



Table 2
City of San Luis Obispo
Orcutt Area Specific Plan Public Facilities Financing Plan
Summary of Project-Specific Infrastructure Costs

Item	Gross Total Cost	OASP Fair Share Percentage	Net Total Cost
Transportation			
<u>Street Improvements</u>			
Orcutt Road/Tank Farm Road	\$927,978	100.0%	\$927,978
Broad Street/South St-Santa Barbara Road	\$1,500,000	25.4%	\$381,000
Broad Street/Tank Farm Rd	\$444,808	50.0%	\$222,404
Orcutt Road/Johnson Ave	\$300,004	100.0%	\$300,004
Broad Street/Prado Road Extension Second Northbound Left Turn Lane	\$135,905	100.0%	\$135,905
Orcutt Road Widening	\$1,250,000	89.9%	\$1,123,750
Bullock Lane Realignment	\$355,796	70.0%	\$249,057
Relocating Hanson Rd or Reducing the Grade on Orcutt at Hanson Rd	\$50,000	100.0%	\$50,000
Transit Stops	\$50,000	100.0%	\$50,000
Subtotal Street Improvements	\$5,014,491		\$3,440,098
<u>Orcutt Expansion Area Bridges</u>			
Bridge A	\$680,000	100.0%	\$680,000
Bridge B	\$420,000	100.0%	\$420,000
Bridge C	\$510,000	100.0%	\$510,000
Subtotal Orcutt Expansion Area Bridges	\$1,610,000		\$1,610,000
Total Transportation	\$6,624,491		\$5,050,098
Pedestrian and Bicycle Paths			
Pedestrian and Bicycle Paths	\$648,200	100.0%	\$648,200
Pedestrian/Bike Overpass	\$3,850,000	100.0%	\$3,850,000
Bike Path Extension Over Tank Farm Road	\$495,109	50.0%	\$247,555
Total Pedestrian and Bicycle Paths	\$4,993,309		\$4,745,755
Regional Detention Basin			
Earthwork	\$425,000	100.0%	\$425,000
Landscaping (Hydroseeded Turf)	\$24,503	100.0%	\$24,503
Landscaping (Natural Area, Mixed Hydroseed and Planted Shrubs-Trees:A	\$326,700	100.0%	\$326,700
Landscaping (Irrigation)	\$171,518	100.0%	\$171,518
Fencing - 6 ft Chain Link	\$65,000	100.0%	\$65,000
Fencing - 42-inch Decorative	\$62,500	100.0%	\$62,500
Outlet Structure and Spillway	\$50,000	100.0%	\$50,000
8 ft Wide Path	\$67,200	100.0%	\$67,200
Storm Drain System Outlets	\$24,000	100.0%	\$24,000
Estimating Contingency (20%)	\$243,284	100.0%	\$243,284
Total Storm Drainage	\$1,459,704		\$1,459,704
Parks & Recreation			
<u>Land Acquisition</u>			
Central Neighborhood Park - Righetti Ranch @ 11.8 acres	\$5,911,000	100.0%	\$5,911,000
Central Neighborhood Park - Garay @ 0.8 acres	\$200,000	100.0%	\$200,000
Pocket Park	\$250,000	100.0%	\$250,000
Linear Park System	\$301,000	100.0%	\$301,000
Subtotal Land Acquisition	\$6,662,000		\$6,662,000
<u>Improvement Costs</u>			
Central Neighborhood Park - Main Portion South of Creeks	\$3,628,000	100.0%	\$3,628,000
Central Neighborhood Park - Phase 2 Portions North of Creeks	\$500,000	100.0%	\$500,000
Pocket Park	\$220,000	100.0%	\$220,000
Linear Park System	\$100,000	100.0%	\$100,000
Subtotal Improvement Costs	\$4,448,000		\$4,448,000
Total Parks & Recreation	\$11,110,000		\$11,110,000
Total Project-Specific Infrastructure Costs	\$24,187,504		\$22,365,557



Table 3
City of San Luis Obispo
Orcutt Area Specific Plan Public Facilities Financing Plan
Capital Facility Benefit Units

Land Use	Capital Facility: Transportation¹		Pedestrian and Bicycle Paths		Storm Drainage		Parks & Recreation	
	Benefit Unit:	Daily Trip Rate	Daily Trip Rate	Daily Trip Rate	Runoff Coefficient	Runoff Coefficient	Residents Served	Residents Served
<i>Residential</i>								
Single Family		9.09 per unit	9.09 per unit	0.40 per acre	2.46 per unit			
Multi-Family		6.35 per unit	6.35 per unit	0.50 per acre	1.83 per unit			

¹ Includes street improvements and bridges.

Source: Draft Transportation Impact Analysis (Fehr & Peers, June 2007); SLO Creek Drainage Design Manual, Table 4-1;
 Goodwin Consulting Group, Inc.



Table 4
City of San Luis Obispo
Orcutt Area Specific Plan Public Facilities Financing Plan
Cost Allocation Table

Transportation

Land Use	Units	Net Acres	Daily Trip Rate	Total Trips	Percent Allocation	Total Costs	Cost per Unit
Cost							
<u>Residential</u>			<i>per Unit</i>				
Single Family	523	87.4	9.09	4,754	64.39%	\$3,251,878	\$6,218
Multi-Family	414	25.9	6.35	2,629	35.61%	\$1,798,220	\$4,344
Total	937	113.3		7,383	100.00%	\$5,050,098	

Source: Goodwin Consulting Group, Inc.

5/21/2008



Table 5
City of San Luis Obispo
Orcutt Area Specific Plan Public Facilities Financing Plan
Cost Allocation Table

Pedestrian and Bicycle Paths

Land Use	Units	Net Acres	Daily Trip Rate	Total Trips	Percent Allocation	Total Costs	Cost per Unit
Cost						\$4,745,755	
<u>Residential</u>			<i>per Unit</i>				
Single Family	523	87.4	9.09	4,754	64.39%	\$3,055,904	\$5,843
Multi-Family	414	25.9	6.35	2,629	35.61%	\$1,689,850	\$4,082
Total	937	113.3		7,383	100.00%	\$4,745,755	

Source: Goodwin Consulting Group, Inc.

5/21/2008



Table 6
City of San Luis Obispo
Orcutt Area Specific Plan Public Facilities Financing Plan
Cost Allocation Table

Storm Drainage

Land Use	Units	Net Acres	Runoff Coefficient	Total Runoff Coefficients	Percent Allocation	Total Costs	Cost per Unit
Cost							
<u>Residential</u>			<i>per Acre</i>				
Single Family	443	77.0	0.40	30.80	75.01%	\$1,094,991	\$2,472
Multi-Family	317	20.5	0.50	10.26	24.99%	\$364,713	\$1,151
Total	760	97.5		41.06	100.00%	\$1,459,704	

Source: Goodwin Consulting Group, Inc.

5/21/2008



Table 7
City of San Luis Obispo
Orcutt Area Specific Plan Public Facilities Financing Plan
Cost Allocation Table

Parks & Recreation

Land Use	Units	Net Acres	Residents Served	Total Residents Served	Percent Allocation	Total Costs	Cost per Unit
Cost							
<u>Residential</u>							
Single Family	523	87.4	2.46	1,287	62.93%	\$6,991,432	\$13,368
Multi-Family	414	25.9	1.83	758	37.07%	\$4,118,568	\$9,948
Total	937	113.3		2,044	100.00%	\$11,110,000	

Source: Goodwin Consulting Group, Inc.

5/21/2008



Table 8
City of San Luis Obispo
Orcutt Area Specific Plan Public Facilities Financing Plan
Project-Specific Infrastructure Cost Allocation Summary

		Capital Facility:	Transportation	Pedestrian and Bicycle Paths	Storm Drainage	Parks & Recreation	Total Cost Allocation	Total Facility Costs	
		Benefit Unit:	Daily Trip Rates	Daily Trip Rates	Runoff Coefficient	Residents Served			
		Capital Costs:	\$5,050,098	\$4,745,755	\$1,459,704	\$11,110,000		\$22,365,557	
Zone 1									
<u>Residential</u>			<u>Cost per Unit</u>						<u>per Unit</u>
Single Family		\$6,218	\$5,843	\$2,472	\$13,368		\$27,900	\$12,359,909	
Multi-Family		\$4,344	\$4,082	\$1,151	\$9,948		\$19,524	\$6,189,120	
Zone 2									
<u>Residential</u>			<u>Cost per Unit</u>						<u>per Unit</u>
Single Family		\$6,218	\$5,843	n/a	\$13,368		\$25,429	\$2,034,297	
Multi-Family		\$4,344	\$4,082	n/a	\$9,948		\$18,374	\$1,782,232	
Total OASP								\$22,365,557	

Source: Goodwin Consulting Group, Inc.



Table 9
City of San Luis Obispo
Orcutt Area Specific Plan Public Facilities Financing Plan
City-Wide and Other Fees

Land Use	City-Wide Development Impact Fees				Other Fees		Total City-Wide and Other Fees
	Transportation Impact Fee ¹	Water Impact Fee	Wastewater Impact Fee ²	Park Mitigation Fee ³	Affordable Housing Fee ⁴	Specific Plan and EIR Fee ⁵	
Single Family	\$3,093 per unit	\$15,292 per unit	\$6,672 per unit	\$5,745 per unit	\$3,610 per unit	\$1,401 per unit	\$35,813 per unit
Multi-Family	\$2,745 per unit	\$12,234 per unit	\$5,338 per unit	\$4,275 per unit	\$1,353 per unit	\$525 per unit	\$26,470 per unit

¹ The transportation impact fee includes the project's fair share of the grade separated crossing on Orcutt.

² The wastewater impact fee includes a city-wide component plus an area-specific add-on fee for the OASP.

³ The City Parks and Recreation Element requires a minimum of 10 acres of parkland per 1,000 residents, or approximately 20.4 acres for the OASP based on expected population. A total of 14.3 acres of parkland is expected to be provided by the OASP; therefore, land acquisition and improvement costs for the remaining 6.1 acres will be funded by the park mitigation fee. The total cost is estimated to be \$4.8 million, or \$777,000 per acre. This cost is allocated to the residential land uses on a per resident served basis in the same manner that project-specific parks and recreation costs are allocated (see Table 7).

⁴ Approximately 2.81 acres of land in the OASP is expected to be dedicated to the SLO Housing Authority, which will satisfy the OASP's low-income affordable housing requirement. The land owner will be reimbursed for land and improvement costs that exceed his fair share. The value of improved land related to this property is estimated to be \$2.5 million, or \$20 per square foot. This cost is spread to the residential land uses equally on a per acre basis. Costs per residential unit are calculated based on the density assumptions shown in Table 1.

⁵ Specific Plan and EIR preparation costs of \$950,000 are spread equally on a per acre basis. Costs per residential unit are calculated based on the density assumptions shown in Table 1.

Source: City of San Luis Obispo; Goodwin Consulting Group, Inc.



Table 10

City of San Luis Obispo
 Orcutt Area Specific Plan Public Facilities Financing Plan
 Total Project-Specific Infrastructure plus City-Wide and Other Fees

Land Use	Project-Specific Infrastructure	City-Wide Fees	Other Fees	Total Gross Fees per Unit	Total Gross Fees per Net Acre	Total Costs and Fees
Zone 1						
<i>Cost per Unit</i>						
<u>Residential</u>						
Single Family	\$27,900	\$25,057	\$10,756	\$63,713	\$366,511	\$28,224,982
Multi-Family	\$19,524	\$20,317	\$6,153	\$45,994	\$710,532	\$14,580,126
Subtotal						\$42,805,108
Zone 2						
<i>Cost per Unit</i>						
<u>Residential</u>						
Single Family	\$25,429	\$25,057	\$10,756	\$61,242	\$472,451	\$4,899,321
Multi-Family	\$18,374	\$20,317	\$6,153	\$44,844	\$805,523	\$4,349,827
Subtotal						\$9,249,148
Total OASP						\$52,054,256

Source: Goodwin Consulting Group, Inc.

5/21/2008



Table 11
City of San Luis Obispo
Orcutt Area Specific Plan Public Facilities Financing Plan
Annual Absorption Assumptions

Land Use	Phase 1										Phase 2			Phase 3		
	Total	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2018	2019	2019	
Zone 1																
<i>Residential Development (Units)</i>																
Single Family	443	37	37	27	27	27	77	53	51	37	36	34				
Multi-Family	317	28	28	23	23	23	28	43	42	42	42	37	0			
Total	760	65	65	50	50	50	105	96	93	79	73	34				
Zone 2																
<i>Residential Development (Units)</i>																
Single Family	80	18	18	14	15	15	0	0	0	0	0	0	0	0	0	
Multi-Family	97	2	2	2	2	2	24	21	21	21	21	0	0	0	0	
Total	177	20	20	16	17	17	24	21	21	21	21	0	0	0	0	

Source: Orcutt Area Specific Plan (Draft, June 2006); City of San Luis Obispo Growth Management Phasing Schedule (General Plan Annual Report, 2006); City of San Luis Obispo; Goodwin Consulting Group, Inc.



Table 12
City of San Luis Obispo
Orcutt Area Specific Plan Public Facilities Financing Plan
Cumulative Absorption Assumptions

Land Use	Phase 1										Phase 2			Phase 3		
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019
Total	55	110	151	193	235	312	365	416	453	489	523	616	730	830	903	937
Zones 1 and 2	30	60	85	110	135	187	251	314	377	414	414					
Residential Development (Units)																
Single Family																
Multi-Family																
Total	85	170	236	303	370	499	616	730	830	903	937					

Source: Orcutt Area Specific Plan (Draft, June 2006); City of San Luis Obispo Growth Management Phasing Schedule (General Plan Annual Report, 2006); City of San Luis Obispo; Goodwin Consulting Group, Inc.

5/21/2008



Table 13
City of San Luis Obispo
Orcutt Area Specific Plan Public Facilities Financing Plan
Phasing Assumptions for Facility Costs

Cost Category	Cost Phasing Assumptions
Transportation	
Orcutt Road/Tank Farm Road	Prior to 237 Units
Broad Street/South St-Santa Barbara Rd.	Prior to 304 Units
Broad Street/Tank Farm Rd	Prior to 304 Units
Orcutt Road/Johnson Ave	Prior to 617 Units
Broad Street/Prado Road Extension	As Fee Revenue Becomes Available ¹
Orcutt Road Widening	As Fee Revenue Becomes Available (Reimburse to Orcutt Associates, LLC) ¹
Bullock Lane Realignment	Prior to 500 Units
Relocating Hanson Rd	Prior to 731 Units
Transit Stops	One Stop per Year, Beginning in Year One
Bridge A	100% in Year One
Bridge B	100% in Year Three
Bridge C	100% in Year Four
Pedestrian and Bicycle Paths	
Pedestrian and Bicycle Paths	As Fee Revenue Becomes Available ¹
Pedestrian/Bike Overpass	Prior to 731 Units
Bike Path Extension Over Tank Farm Rd.	Prior to 500 Units
Regional Detention Basin	100% in Year One
Parks & Recreation	
Land Acquisition	100% in Year One
Improvement Costs	75% Spread Evenly Through Phase 1; 25% Spread Evenly Across First Two Years of Phase 2

¹ These infrastructure items and reimbursements are anticipated to occur in the last two years of Phase 3 (see Table 14), in which the costs do not cause the total cumulative net deficit to increase (see Table 15).



Table 14
City of San Luis Obispo
Orcutt Area Specific Plan Public Facilities Financing Plan
Annual Facility Cost Phasing

Item	Phase 1			Phase 2			Phase 3				
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Total											
Transportation											
Orcutt Road/Tank Farm Road	\$927,978	\$0	\$927,978	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Broad Street/South St-Santa Barbara Rd.	\$381,000	\$0	\$0	\$381,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Broad Street/Tank Farm Rd	\$222,404	\$0	\$0	\$222,404	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Orcutt Road/Johnson Ave	\$300,004	\$0	\$0	\$0	\$0	\$0	\$300,004	\$0	\$0	\$0	\$0
Broad Street/Prado Road Extension	\$135,905	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$135,905	\$0
Orcutt Road Widening	\$1,123,750	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$823,334	\$300,416
Bullock Lane Realignment	\$249,057	\$0	\$0	\$0	\$0	\$249,057	\$0	\$0	\$0	\$0	\$0
Relocating Hanson Rd	\$50,000	\$0	\$0	\$0	\$0	\$0	\$0	\$50,000	\$0	\$0	\$0
Transit Stops	\$50,000	\$10,000	\$10,000	\$10,000	\$10,000	\$0	\$0	\$0	\$0	\$0	\$0
Bridge A	\$680,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Bridge B	\$420,000	\$0	\$420,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Bridge C	\$510,000	\$0	\$0	\$510,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Subtotal Transportation Improvements	\$5,050,098	\$10,000	\$1,357,978	\$1,123,404	\$10,000	\$249,057	\$300,004	\$50,000	\$0	\$959,239	\$300,416
Pedestrian and Bicycle Paths											
Pedestrian and Bicycle Paths	\$648,200	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$648,200
Pedestrian/Bike Overpass	\$3,850,000	\$0	\$0	\$0	\$0	\$0	\$0	\$3,850,000	\$0	\$0	\$0
Bike Path Extension Over Tank Farm Rd.	\$247,555	\$0	\$0	\$0	\$0	\$247,555	\$0	\$0	\$0	\$0	\$0
Subtotal Pedestrian and Bicycle Paths	\$4,745,755	\$0	\$0	\$0	\$0	\$247,555	\$0	\$3,850,000	\$0	\$0	\$648,200
Regional Detention Basin											
Regional Detention Basin	\$1,459,704	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Parks & Recreation											
Land Acquisition	\$6,662,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Improvement Costs	\$4,448,000	\$667,200	\$667,200	\$667,200	\$667,200	\$556,000	\$556,000	\$0	\$0	\$0	\$0
Subtotal Parks & Recreation	\$11,110,000	\$667,200	\$667,200	\$667,200	\$667,200	\$556,000	\$556,000	\$0	\$0	\$0	\$0
Total Infrastructure Costs	\$22,365,557	\$677,200	\$2,025,178	\$1,790,604	\$677,200	\$1,052,612	\$856,004	\$3,900,000	\$0	\$959,239	\$948,616

Source: City of San Luis Obispo; Goodwin Consulting Group, Inc. 5/21/2008



Table 15
City of San Luis Obispo
Orcutt Area Specific Plan Public Facilities Financing Plan
Revenue vs Costs - Project-Specific Infrastructure

Improvement	Phase 1										Phase 2			Phase 3		
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2016	2017	2018	2019	
Transportation																
Revenues	\$472,282	\$472,282	\$363,516	\$369,733	\$369,733	\$704,629	\$607,526	\$590,747	\$503,699	\$384,549	\$211,403					
Costs	(\$690,000)	(\$10,000)	(\$1,357,978)	(\$1,123,404)	(\$10,000)	(\$249,057)	(\$300,004)	(\$50,000)	\$0	(\$959,239)	(\$300,416)					
Net	(\$217,718)	\$462,282	(\$994,462)	(\$753,671)	\$359,733	\$455,572	\$307,522	\$540,747	\$503,699	(\$574,690)	(\$89,013)					
Cumulative Net	(\$217,718)	\$244,563	(\$749,899)	(\$1,503,570)	(\$1,143,837)	(\$688,265)	(\$380,743)	\$160,004	\$663,703	\$89,013	\$0					
Pedestrian and Bicycle Paths																
Revenues	\$443,820	\$443,820	\$341,608	\$347,451	\$347,451	\$662,165	\$570,913	\$555,146	\$473,343	\$361,374	\$198,663					
Costs	\$0	\$0	\$0	\$0	\$0	(\$247,555)	\$0	(\$3,850,000)	\$0	\$0	(\$648,200)					
Net	\$443,820	\$443,820	\$341,608	\$347,451	\$347,451	\$414,610	\$570,913	(\$3,294,854)	\$473,343	\$361,374	(\$449,537)					
Cumulative Net	\$443,820	\$887,639	\$1,229,247	\$1,576,699	\$1,924,150	\$2,338,760	\$2,909,674	(\$385,181)	\$88,163	\$449,537	\$0					
Regional Dentention Basin																
Revenues	\$123,670	\$123,670	\$93,199	\$93,199	\$93,199	\$222,540	\$180,476	\$174,382	\$139,777	\$131,552	\$84,040					
Costs	(\$1,459,704)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0					
Net	(\$1,336,034)	\$123,670	\$93,199	\$93,199	\$93,199	\$222,540	\$180,476	\$174,382	\$139,777	\$131,552	\$84,040					
Cumulative Net	(\$1,336,034)	(\$1,212,365)	(\$1,119,165)	(\$1,025,966)	(\$932,766)	(\$710,226)	(\$529,751)	(\$355,369)	(\$215,592)	(\$84,040)	\$0					
Parks & Recreation																
Revenues	\$1,033,684	\$1,033,684	\$796,791	\$810,159	\$810,159	\$1,546,639	\$1,345,188	\$1,308,504	\$1,121,352	\$849,330	\$454,510					
Costs	(\$7,329,200)	(\$667,200)	(\$667,200)	(\$667,200)	(\$667,200)	(\$556,000)	(\$556,000)	\$0	\$0	\$0	\$0					
Net	(\$6,295,516)	\$366,484	\$129,591	\$142,959	\$142,959	\$990,639	\$789,188	\$1,308,504	\$1,121,352	\$849,330	\$454,510					
Cumulative Net	(\$6,295,516)	(\$5,929,033)	(\$5,799,442)	(\$5,656,482)	(\$5,513,523)	(\$4,522,884)	(\$3,733,696)	(\$2,425,192)	(\$1,303,840)	(\$454,510)	\$0					
Total																
Revenues	\$2,073,454	\$2,073,454	\$1,595,115	\$1,620,543	\$1,620,543	\$3,135,974	\$2,704,103	\$2,628,778	\$2,238,171	\$1,726,806	\$948,616					
Costs	(\$9,478,904)	(\$677,200)	(\$2,025,178)	(\$1,790,604)	(\$677,200)	(\$1,052,612)	(\$856,004)	(\$3,900,000)	\$0	(\$959,239)	(\$948,616)					
Net	(\$7,405,450)	\$1,396,254	(\$430,063)	(\$170,061)	\$943,343	\$2,083,362	\$1,848,099	(\$1,271,222)	\$2,238,171	\$767,567	\$0					
Cumulative Net	(\$7,405,450)	(\$6,009,196)	(\$6,439,259)	(\$6,609,320)	(\$5,665,977)	(\$3,582,614)	(\$1,734,516)	(\$3,005,738)	(\$767,567)	\$0	\$0					
Assuming CFD Financing																
Adjusted Fee Revenues	\$1,194,689	\$1,194,689	\$919,078	\$933,729	\$933,729	\$1,806,895	\$1,558,058	\$1,514,657	\$1,289,596	\$994,956	\$546,576					
CFD Proceeds	\$9,478,904	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0					
Costs	(\$9,478,904)	(\$677,200)	(\$2,025,178)	(\$1,790,604)	(\$677,200)	(\$1,052,612)	(\$856,004)	(\$3,900,000)	\$0	(\$959,239)	(\$948,616)					
Net	\$1,194,689	\$517,489	(\$1,106,100)	(\$856,875)	\$256,529	\$754,283	\$702,054	(\$2,385,343)	\$1,289,596	\$35,717	(\$402,040)					
Cumulative Net	\$1,194,689	\$1,712,178	\$606,078	(\$250,797)	\$5,733	\$760,016	\$1,462,069	(\$923,274)	\$366,322	\$402,040	\$0					



APPENDIX B

OASP FACILITY COST ESTIMATES



SUMMARY
ORCUTT AREA SPECIFIC PLAN
PUBLIC IMPROVEMENT PROJECTS
PRELIMINARY OPINION OF PROBABLE COST

	<u>TOTAL COST</u>	<u>OASP FAIR SHARE PERCENTAGE</u>	<u>OASP COST</u>
PROJECT 1 - ORCUTT RD/TANK FARM RD	\$928,000	100%	\$928,000
PROJECT 2 - BROAD ST / SOUTH ST-SANTA BARBARA RD IMPROVEMENTS Cost provided by City of SLO per Conversation over phone with Tim Bochum on 8/24/07.	\$1,500,000	25.40%	\$381,000
PROJECT 3 - BROAD ST / TANK FARM RD SECOND SOUTHBOUND LEFT TURN LANE AND A SECOND NORTHBOUND LEFT TURN LANE	\$445,000	50.00%	\$222,500
PROJECT 4 - ORCUTT RD/JOHNSON AVE	\$300,000	100%	\$300,000
PROJECT 5 - BROAD ST / PRADO RD EXTENSION SECOND NORTHBOUND LEFT TURN LANE	\$136,000	100%	\$136,000
PROJECT 6 - PEDESTRIAN AND BICYCLE PATHS	\$649,000	100%	\$649,000
PROJECT 7 - TANK FARM ROAD WIDENING	CITY STAFF DISCUSSION TO DETERMINE FAIR SHARE	100%	\$0
PROJECT 8 - ORCUTT ROAD WIDENING BROAD TO LAUREL - DEVELOPER'S SIDE + 12 FT. Cost provided by City of SLO per Conversation over phone with Tim Bochum on 8/24/07.	\$1,250,000	89.90%	\$1,123,750
PROJECT 9 - ORCUTT RD WIDENING JOHNSON TO TANK FARM - DEVELOPER'S SIDE + 12 FT.	COST BORN BY OASP OWNERS	100%	\$0
PROJECT 10 - ORCUTT RD WIDENING LAUREL TO FERNWOOD - DEVELOPER'S SIDE + 12 FT.	COST BORN BY OASP OWNERS	100%	\$0
PROJECT 11 - ORCUTT RD WIDENING FERNWOOD TO JOHNSON - DEVELOPER'S SIDE + 12 FT.	COST BORN BY OASP OWNERS	100%	\$0
PROJECT 12 - GRADE SEPARATED CROSSING ON ORCUTT Cost provided by City of SLO	CITY OF SLO TO PROVIDE	45%	\$5,400,000
PROJECT 13 - PEDESTRIAN / BIKE OVERPASS	\$3,850,000	100%	\$3,850,000
PROJECT 14 - BULLOCK LANE REALIGNMENT (400 ft)	\$356,000	70%	\$249,200
PROJECT 15 - RELOCATING HANSON RD OR REDUCING THE GRADE ON ORCUTT AT HANSON RD	\$50,000	100%	\$50,000
PROJECT 16 - BIKE PATH EXTENSION OVER TANK FARM ROAD	\$437,000	50.00%	\$218,500
TOTAL CONSTRUCTION ESTIMATE	\$21,901,013		\$13,507,950



PROJECT 1
ORCUTT AREA SPECIFIC PLAN
PUBLIC IMPROVEMENT PROJECTS - ORCUTT RD/TANK FARM RD
PRELIMINARY OPINION OF PROBABLE COST

	QUANTITY		UNITS	ESTIMATE
	UNIT COST	PROJECT 1		PROJECT 1
MOBILIZATION/DEMOLITION				
SITE PREPARATION:				
Sawcut & remove portion of existing pavement	\$5.00	2250.00	LF	\$11,250
Grind existing pavement markings	\$1.50	800.00	LF	\$1,200
SUBTOTAL				\$12,450

EARTHWORK:				
Roadway Ex	\$82.00	1314.00	CY	\$107,748
Assumed depth is the structural section of 6.5" AC, 11" CI II Base, 12" CI III Base per City of SLO Std.7110 - Unphased New Collector / Arterial				
SUBTOTAL				\$107,748

ROAD:				
HARDSCAPE				
Asphalt Concrete Type B (Assume 6.5 in)	\$90.00	555.00	TON	\$49,950
Class II Aggregate Base (Assume 11 in)	\$27.00	953.00	TON	\$25,731
Class III Aggregate Base (Assume 12 in)	\$25.00	1039.00	TON	\$25,975
Type A AC Dike	\$0.95	1250.00	LF	\$1,188
SUBTOTAL				\$102,844

TRAFFIC MARKINGS:				
Standard Street Sign per SLO Co. Std. Dwg M-6 (With Stop Sign)	\$400.00	1.00	EA	\$400
Paint Traffic Markings - Type I (3.05m) Arrow per CalTrans Std A24A	\$350.00	3.00	EA	\$1,050
Paint Traffic Markings - 12" White Limit Line per CalTrans Std. A24E	\$150.00	4.00	EA	\$600
Paint Marking Words - 'STOP' per CalTrans Std. Plan A24D	\$350.00	6.00	EA	\$2,100
Paint Stripe - 4" White Edge Line	\$3.00	1120.00	LF	\$3,360
Signal Arm & Head - Includes footing, Control Box and Signal Loops	\$62,500.00	4.00	EA	\$250,000
SUBTOTAL				\$257,510

MISCELLANEOUS:				
Erosion Control - Type D (Hydroseeding)	\$0.09	24000.00	SF	\$2,160
Remove PG&E poles	\$6,000.00	4.00	EA	\$24,000
Relocate PG&E Vault	\$4,000.00	1.00	EA	\$4,000
Relocate Street Light	\$1,800.00	1.00	EA	\$1,800
Underground Dry Utilities	\$110.00	940.00	LF	\$144,198
SUBTOTAL				\$176,158

UNDERGROUND				
STORM DRAIN:				
Culvert Extension (1 @ 30 lf)	\$40.00	30.00	LF	\$1,200
Headwall	\$2,100.00	1.00	EA	\$2,100
Overside drains	\$1,200.00	2.00	EA	\$2,400
Rip Rap outfalls (Assume 4' x 6' x 1')	\$18.00	24.00	SF	\$432
SUBTOTAL				\$6,132

CONSTRUCTION ESTIMATE \$662,842

10% CONTINGENCY \$66,284

30% DESIGN, ENVIRONMENTAL, PERMITTING \$198,852

TOTAL CONSTRUCTION ESTIMATE \$927,978

NOTE:

1. THIS ESTIMATE WAS PREPARED WITHOUT THE BENEFIT OF COMPLETE GRADING AND IMPROVEMENT PLANS.
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PROJECT 3
ORCUTT AREA SPECIFIC PLAN
PUBLIC IMPROVEMENT PROJECTS - BROAD ST/TANK FARM RD
PRELIMINARY OPINION OF PROBABLE COST

	QUANTITY		UNITS	ESTIMATE
	UNIT COST	PROJECT 3		PROJECT 3
MOBILIZATION/DEMOLITION				
SITE PREPARATION:				
1 Sawcut & remove portion of existing pavement	\$5.00	1080.00	LF	\$5,400
2 Grind existing pavement markings	\$1.50	1080.00	LF	\$1,620
3 Demo existing 5' sidewalk	\$4.00	3000.00	SF	\$12,000
4 Demo existing curb and gutter	\$10.00	800.00	LF	\$8,000
SUBTOTAL				\$27,020

EARTHWORK:				
5 Roadway Ex	\$82.00	1180.00	CY	\$96,760
Assumed depth is the structural section of 6.5" AC, 11" CI II Base, 12" CI III Base per City of SLO Std.7110 - Unphased New Collector / Arterial				
SUBTOTAL				\$96,760

HARDSCAPE				
ROAD:				
6 Asphalt Concrete Type B (Assume 6.5 in)	\$90.00	500.00	TON	\$45,000
7 Class II Aggregate Base (Assume 11 in)	\$27.00	855.00	TON	\$23,085
8 Class III Aggregate Base (Assume 12 in)	\$25.00	935.00	TON	\$23,375
9 6-in Curb/18-in Gutter per SLO Co. Std. Dwg. C-1 (Type A)	\$18.50	1080.00	LF	\$19,980
10 5' Sidewalk	\$5.00	5400.00	SF	\$27,000
SUBTOTAL				\$138,440

TRAFFIC MARKINGS:				
11 Paint Traffic Markings - Type I (3.05m) Arrow per CalTrans Std A24A	\$350.00	8.00	EA	\$2,800
12 Paint Traffic Markings - 12" White Limit Line per CalTrans Std. A24E	\$150.00	4.00	EA	\$600
13 Paint Stripe - 3" Double Yellow Left Edge Line per CalTrans Std. A20B (Detail 27)	\$3.00	540.00	LF	\$1,620
14 Paint Stripe - 3" White Lane Line	\$3.00	2160.00	LF	\$6,480
SUBTOTAL				\$11,500

MISCELLANEOUS:				
16 Utility Pole Relocation	\$9,000.00	4.00	EA	\$36,000
17 Signalization Modification	\$15,000.00	1.00	LS	\$15,000
SUBTOTAL				\$44,000

CONSTRUCTION ESTIMATE **\$317,720**

10% CONTINGENCY **\$31,772**

30% DESIGN, ENVIRONMENTAL, PERMITTING **\$95,316**

TOTAL CONSTRUCTION ESTIMATE **\$444,808**

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PROJECT 4
ORCUTT AREA SPECIFIC PLAN
PUBLIC IMPROVEMENT PROJECTS - ORCUTT RD/JOHNSON AVE
PRELIMINARY OPINION OF PROBABLE COST

	QUANTITY		UNITS	ESTIMATE
	UNIT COST	PROJECT 4		PROJECT 4
MOBILIZATION/DEMOLITION				
SITE PREPARATION:				
Sawcut	\$2.00	450.00	LF	\$900
Grind out existing AC pavement (Assume 4" thick)	\$2.00	11310.00	SF	\$22,620
Dispose existing AC pavement	\$50.00	140.00	CY	\$7,000
SUBTOTAL				\$30,520

EARTHWORK:				
Roadway Ex	\$82.00	1030.00	CY	\$84,460
Assumed depth is the structural section of 6.5" AC, 11" CI II Base, 12" CI III Base per City of SLO Std.7110 - Unphased New Collector / Arterial				
SUBTOTAL				\$84,460

HARDSCAPE				
ROAD:				
Asphalt Concrete Type B (Assume 6.5 in)	\$90.00	279.00	TON	\$25,110
Class II Aggregate Base (Assume 11 in)	\$27.00	478.00	TON	\$12,906
Class III Subbase (Assume 12 in)	\$25.00	521.00	TON	\$13,025
Concrete Apron (8' wide x 6" thick)	\$7.50	1609.00	SF	\$12,068
Pavers	\$10.00	2465.00	SF	\$24,650
SUBTOTAL				\$87,759

TRAFFIC MARKINGS:				
"One Way" Sign per CalTrans R10	\$400.00	3.00	EA	\$1,200
"Yield" Sign per CalTrans R1-2	\$400.00	3.00	EA	\$1,200
Roundabout Warning Sign	\$400.00	3.00	EA	\$1,200
Paint Traffic Markings - Type I (3.05m) Arrow per CalTrans Std A24A	\$350.00	3.00	EA	\$1,050
Paint Traffic Markings - 12" White Limit Line per CalTrans Std. A24E	\$150.00	3.00	EA	\$450
Paint Marking Words - 'YIELD' per CalTrans Std. Plan A24D	\$350.00	3.00	EA	\$1,050
Paint Traffic Markings - 8" White Channelizing Line per CalTrans Std. A20D	\$5.00	900.00	LF	\$4,500
Paint Stripe - 3" Double Yellow Left Edge Line per CalTrans Std. A20B (Detail 27)	\$3.00	300.00	LF	\$900
SUBTOTAL				\$11,550

CONSTRUCTION ESTIMATE **\$214,289**

10% CONTINGENCY **\$21,429**

30% DESIGN, ENVIRONMENTAL, PERMITTING **\$64,287**

TOTAL CONSTRUCTION ESTIMATE **\$300,004**

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PROJECT 5

**ORCUTT AREA SPECIFIC PLAN
PUBLIC IMPROVEMENT PROJECTS - BROAD ST/PRADO RD 2ND NORTHBOUND LEFT TURN LANE
PRELIMINARY OPINION OF PROBABLE COST**

	QUANTITY		UNITS	ESTIMATE
	UNIT COST	PROJECT 5		PROJECT 5
MOBILIZATION/DEMOLITION				
SITE PREPARATION:				
Sawcut & remove portion of existing pavement	\$5.00	400.00	LF	\$2,000
Grind existing pavement markings	\$1.50	400.00	LF	\$600
Demo existing 5' sidewalk	\$4.00	2000.00	SF	\$8,000
Demo existing curb and gutter	\$10.00	400.00	LF	\$4,000
			SUBTOTAL	\$14,600
EARTHWORK:				
Roadway Ex	\$82.00	225.00	CY	\$18,450
Assumed depth is the structural section of 6.5" AC, 11" CI II Base, 12" CI III Base per City of SLO Std.7110 - Unphased New Collector / Arterial				
			SUBTOTAL	\$18,450
HARDSCAPE				
ROAD:				
Asphalt Concrete Type B (Assume 6.5 in)	\$90.00	100.00	TON	\$9,000
Class II Aggregate Base (Assume 11 in)	\$27.00	175.00	TON	\$4,725
Class III Aggregate Base (Assume 12 in)	\$25.00	200.00	TON	\$5,000
6-in Curb/18-in Gutter per SLO Co. Std. Dwg. C-1 (Type A)	\$18.50	400.00	LF	\$7,400
5' Sidewalk	\$5.00	2000.00	SF	\$10,000
			SUBTOTAL	\$36,125
TRAFFIC MARKINGS:				
Paint Traffic Markings - Type I (3.05m) Arrow per CalTrans Std A24A	\$350.00	4.00	EA	\$1,400
Paint Traffic Markings - 12" White Limit Line per CalTrans Std. A24E	\$150.00	2.00	EA	\$300
Paint Stripe - 3" Double Yellow Left Edge Line per CalTrans Std. A20B (Detail 27)	\$3.00	400.00	LF	\$1,200
Paint Stripe - 3" Yellow Center Line	\$3.00	200.00	LF	\$600
Paint Stripe - 3" Solid White Lane Line	\$3.00	800.00	LF	\$2,400
			SUBTOTAL	\$5,900
MISCELLANEOUS:				
Utility Pole Relocation	\$9,000.00	2.00	EA	\$18,000
Signalization Modification	\$15,000.00	1.00	LS	\$4,000
			SUBTOTAL	\$22,000

CONSTRUCTION ESTIMATE **\$97,075**

10% CONTINGENCY **\$9,708**

30% DESIGN, ENVIRONMENTAL, PERMITTING **\$29,123**

TOTAL CONSTRUCTION ESTIMATE **\$135,905**

NOTE:

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PROJECT 6

**ORCUTT AREA SPECIFIC PLAN
PUBLIC IMPROVEMENT PROJECTS - PEDESTRIAN AND BICYCLE PATHS
PRELIMINARY OPINION OF PROBABLE COST**

	QUANTITY		UNITS	ESTIMATE
	UNIT COST	PROJECT 6		PROJECT 6
EARTHWORK:				
Roadway Ex Assume 2' DG shoulder, 12' AC Ped/Bike Path, 2' DG shoulder	\$82.00	2965.00	CY	\$243,130
SUBTOTAL				\$243,130
HARDSCAPE				
ROAD:				
Asphalt Concrete Type B (Assume 3" thick)	\$90.00	1065.00	TON	\$95,850
Class II Aggregate Base (Assume 8" thick)	\$27.00	720.00	TON	\$19,440
DG Shoulder (Assume 6" thick)	\$25.00	2880.00	TON	\$72,000
SUBTOTAL				\$187,290
MISCELLANEOUS:				
Erosion Control - Type D (Hydroseeding)	\$0.09	40000.00	SF	\$3,600
Paint Stripe - 3" Solid Yellow Center Line	\$2.00	10000.00	LF	\$20,000
Yield Symbols	\$100.00	20.00	EA	\$2,000
Misc Signage	\$250.00	10.00	EA	\$2,500
24" CMP Culvert (4 @ 28 lf each)	\$40.00	112.00	LF	\$4,480
SUBTOTAL				\$32,580

CONSTRUCTION ESTIMATE **\$463,000**

10% CONTINGENCY **\$46,300**

30% DESIGN, ENVIRONMENTAL, PERMITTING **\$138,900**

TOTAL CONSTRUCTION ESTIMATE **\$648,200**

NOTE:

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PROJECT 13

**ORCUTT AREA SPECIFIC PLAN
PUBLIC IMPROVEMENT PROJECTS - INDUSTRIAL WAY PEDESTRIAN / BIKE OVERPASS
PRELIMINARY OPINION OF PROBABLE COST**

	QUANTITY		UNITS	ESTIMATE
	UNIT COST	PROJECT 13		PROJECT 13
MOBILIZATION/DEMOLITION				
PRIOR SIMILAR PROJECT				
1 Jennifer Street Bridge - 1998	\$2,500,000.00	1.00	LS	\$2,500,000
SUBTOTAL				\$2,500,000

MISCELLANEOUS: ENR Construction Cost Index from January 2000 to January 2007 @ 4% per year				
2 1998	\$2,500,000.00	4%	LS	\$100,000.00
4 1999	\$2,500,000.00	4%	LS	\$100,000.00
5 2000	\$2,500,000.00	4%	LS	\$100,000.00
6 2001	\$2,500,000.00	4%	LS	\$100,000.00
7 2002	\$2,500,000.00	4%	LS	\$100,000.00
8 2003	\$2,500,000.00	4%	LS	\$100,000.00
9 2004	\$2,500,000.00	4%	LS	\$100,000.00
10 2005	\$2,500,000.00	4%	LS	\$100,000.00
11 2006	\$2,500,000.00	4%	LS	\$100,000.00
12 2007	\$2,500,000.00	4%	LS	\$100,000.00

SUBTOTAL \$1,000,000

CONSTRUCTION ESTIMATE \$3,500,000

10% CONTINGENCY \$350,000

TOTAL CONSTRUCTION ESTIMATE \$3,850,000

NOTE:

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PROJECT 14
ORCUTT AREA SPECIFIC PLAN
PUBLIC IMPROVEMENT PROJECTS - BULLOCK LANE REALIGNMENT (300 IF)
PRELIMINARY OPINION OF PROBABLE COST

	QUANTITY		UNITS	ESTIMATE
	UNIT COST	PROJECT 14		PROJECT 14

SITE PREPARATION:					
1	Sawcut & remove portion of existing pavement	\$2.00	50.00	LF	\$100
2	Grind existing pavement markings	\$1.50	6000.00	LF	\$9,000
SUBTOTAL					\$9,100

EARTHWORK:					
	Roadway Ex	\$82.00	1385.00	CY	\$113,570
Assumed depth is the structural section of 6.5" AC, 11" CI II Base, 12" CI III Base per City of SLO Std.7110 - Unphased New Collector / Arterial					
SUBTOTAL					\$113,570

ROAD:					
	Asphalt Concrete Type B (Assume 6.5 in)	\$90.00	554.00	TON	\$49,860
	Class II Aggregate Base (Assume 11 in)	\$27.00	950.00	TON	\$25,650
	Class III Aggregate Base (Assume 12 in)	\$25.00	1036.00	TON	\$25,900
	18" C&G	\$18.50	600.00	LF	\$11,100
	5' Sidewalk	\$5.00	3000.00	SF	\$15,000
SUBTOTAL					\$127,510

TRAFFIC MARKINGS:					
	Standard Street Sign per SLO Co. Std. Dwg M-6 (With Stop Sign)	\$400.00	1.00	EA	\$400
	Paint Traffic Markings - 12" White Limit Line per CalTrans Std. A24E	\$150.00	1.00	EA	\$150
	Paint Marking Words - 'STOP' per CalTrans Std. Plan A24D	\$350.00	1.00	EA	\$350
	Paint Stripe - 3" Yellow Center Line	\$3.00	300.00	LF	\$900
	Paint Stripe - 4" White Edge Line	\$3.00	600.00	LF	\$1,800
SUBTOTAL					\$3,600

MISCELLANEOUS:					
	Erosion Control - Type D (Hydroseeding)	\$0.09	4000.00	SF	\$360
SUBTOTAL					\$360

CONSTRUCTION ESTIMATE \$254,140

10% CONTINGENCY \$25,414

30% DESIGN, ENVIRONMENTAL, PERMITTING \$76,242

TOTAL CONSTRUCTION ESTIMATE \$355,796

NOTE:

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4. UNIT PRICING INCLUDES TRAFFIC CONTROL / FLAGGING COSTS.



PROJECT 15
ORCUTT AREA SPECIFIC PLAN
PUBLIC IMPROVEMENT PROJECTS - REDUCING GRADE ON ORCUTT & HANSON
PRELIMINARY OPINION OF PROBABLE COST

	QUANTITY		UNITS	ESTIMATE
	UNIT COST	PROJECT 15		PROJECT 15
MOBILIZATION/DEMOLITION				
EARTHWORK:				
Grind out existing AC pavement (Assume 4" thick)	\$2.00	36500.00	SF	\$73,000
Dispose existing AC pavement	\$25.00	470.00	CY	\$11,750
Export excess soils (Assume lowering roadway 4' avg.)	\$20.00	5410.00	CY	\$108,200
Fine Grade Subgrade	\$0.15	51875.00	SF	\$7,781
SUBTOTAL				\$200,731

HARDSCAPE				
ROAD:				
Asphalt Concrete Type B (Assume 6.5 in)	\$90.00	1995.00	TON	\$179,550
Class II Aggregate Base	\$27.00	3425.00	TON	\$92,475
Class III Aggregate Base (Assume 12 in)	\$25.00	3735.00	TON	\$93,375
(Assumed structural section of 6.5" AC, 11" CI II Base, 12" CI III Base per City of SLO Std.7110 - Unphased New Collector / Arterial)				
SUBTOTAL				\$365,400

TRAFFIC MARKINGS:				
Paint Traffic Markings - 12" White Limit Line per CalTrans Std. A24E	\$150.00	1.00	EA	\$150
Paint Marking Words - "STOP" per CalTrans Std. Plan A24D	\$350.00	1.00	EA	\$350
Paint Traffic Markings - Type I (3.05m) Arrow per CalTrans Std A24A	\$350.00	1.00	EA	\$350
Paint Stripe - 3" Yellow Center Line	\$3.00	750.00	LF	\$2,250
Paint Stripe - 4" Solid White Lane Line	\$3.00	1500.00	LF	\$4,500
Paint Stripe - 3" Yellow	\$3.00	1600.00	LF	\$4,800
Relocate stop sign	\$150.00	1.00	EA	\$150
SUBTOTAL				\$12,550

MISCELLANEOUS:				
Standard Street Sign per SLO Co. Std. Dwg M-6 (With Stop Sign)	\$400.00	1.00	EA	\$400
Utility Pole Relocation (3 on Hansen Rd & 1 on Orcutt Rd)	\$9,000.00	4.00	EA	\$36,000
Erosion Control - Type D (Hydroseeding)	\$0.09	12000.00	SF	\$1,080
SUBTOTAL				\$37,480

CONSTRUCTION ESTIMATE **\$616,161**

10% CONTINGENCY **\$61,616**

30% DESIGN, ENVIRONMENTAL, PERMITTING **\$184,848**

TOTAL CONSTRUCTION ESTIMATE **\$862,626**

NOTE:

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3. LAND ACQUISITION, R.O.W. OR LEGAL COSTS NOT INCLUDED.
4. UNIT PRICING INCLUDES TRAFFIC CONTROL / FLAGGING COSTS.



PROJECT 16

**ORCUTT AREA SPECIFIC PLAN
PUBLIC IMPROVEMENT PROJECTS - PEDESTRIAN / BIKE OVERPASS AT TANK FARM RD.
PRELIMINARY OPINION OF PROBABLE COST**

	QUANTITY		UNITS	ESTIMATE
	UNIT COST	PROJECT 16		PROJECT 16
BRIDGE DESCRIPTION				
170' x 10' Pedestrian / Bike bridge adjacent to the railroad bridge on Tank Farm Road. Estimate includes construction of abutments / foundations and cast in place reinforced concrete deck. The bridge will have weathered steel finish and use "H" section diagonal trusses.	\$300,000.00	1.00	LS	\$300,000
SUBTOTAL				\$300,000
EARTHWORK:				
Import Fill Material	\$60.00	540.00	CY	\$32,400
Roadway Ex Assume 2' DG shoulder, 12' AC Ped/Bike Path, 2' DG shoulder	\$82.00	142.00	CY	\$11,644
SUBTOTAL				\$11,644
HARDSCAPE				
ROAD: Asphalt Concrete Type B (Assume 3" thick)	\$90.00	55.00	TON	\$4,950
Class II Aggregate Base (Assume 8" thick)	\$27.00	140.00	TON	\$3,780
DG Shoulder (Assume 6" thick)	\$25.00	35.00	TON	\$875
SUBTOTAL				\$9,605

CONSTRUCTION ESTIMATE **\$311,644**

10% CONTINGENCY **\$31,164**

30% DESIGN, ENVIRONMENTAL, PERMITTING **\$93,493**

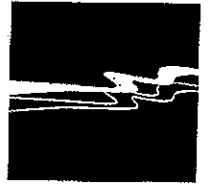
TOTAL CONSTRUCTION ESTIMATE **\$436,302**

NOTE:

1. THIS ESTIMATE WAS PREPARED WITHOUT THE BENEFIT OF COMPLETE GRADING AND IMPROVEMENT PLANS.
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3. LAND ACQUISITION, R.O.W. OR LEGAL COSTS NOT INCLUDED.
4. UNIT PRICING INCLUDES TRAFFIC CONTROL / FLAGGING COSTS.



MEMORANDUM



WALLACE GROUP

CIVIL ENGINEERING

CONSTRUCTION
MANAGEMENT

LANDSCAPE
ARCHITECTURE

MECHANICAL
ENGINEERING

PLANNING

PUBLIC WORKS
ADMINISTRATION

SURVEYING /
GIS SOLUTIONS

WATER RESOURCES

WALLACE SWANSON
INTERNATIONAL

TO: Brad Brechwald
FROM: Tony Hopkins
DATE: May 15, 2007
SUBJ: Orcutt Expansion Area Bridge Cost Estimate

Per our conversation, here are reasonable estimates based upon the spans and widths of these bridges as shown in the draft Specific Plan Documents.

Orcutt Expansion Area Bridges:

Bridge A

75' L x 27' W = 2025 sf @ \$335.00/sf = \$678,375.00 (Use \$680k)

Bridge B

52' L x 24' W = 1248 sf @ \$335.00/sf = \$418,080.00 (Use 420k)

Bridge C

58' L x 26' W = 1508 sf @ \$335.00/sf = \$505,180.00 (Use 510k)

Note: these cost breakdowns are based upon the following research:

1. Bridge over Cayucos Creek on Picachio Rd.

65' L x 25' W = 1,625 sf.

Avg. Bid = \$1,234,477.20

Therefore, the average square foot price = \$760.00

Please note that this bridge has a lot of bells and whistles such as sheet piling in the creek bed and preformed, pre-stressed panels for the decking in lieu of cast in place decking.

2. Per Dave Carter of Applied Engineering, the average square foot price is \$250.00

Using the a weighted average $[5(\$250) + 1(\$760)] / 6$, the cost per square foot is estimated at \$335.00

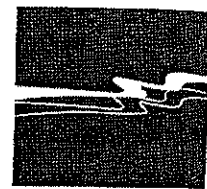
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MEMORANDUM



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Date: May 15, 2007
To: Andrew Merriam
From: Craig Campbell, PE
Subject: Orcutt Area Specific Plan - Regional Basin Cost Estimate

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Andrew,

Attached is a cost estimate for the Orcutt Area Specific Plan (OASP) regional detention basin.

The estimate is ballpark only and is based on assumptions, not design or even preliminary plans. Therefore we have included a 20% estimating contingency. Also, the estimate is based on current costs, and if this estimate is for a facility to be constructed in the future, appropriate inflation factors should be applied.

Some of the assumptions used include the following:

- The basin will encompass about 7.5 acres of land.
- The basin will have an operating volume of about 30 ac-ft.
- The type of landscaping can cause the cost of the basin to vary greatly. We assumed that the basin will have upper terraces that are used as turf areas. This will account for about 20 percent of the basin area. The majority of the basin will be subject to inundation too frequently to be used as a turf area, and will be landscaped as either wetland and/or long grasses/shrubs/trees.
- The basin will be fenced, 6 ft chainlink along the RR tracks, and 42-inch decorative along the streets.
- An 8-ft wide concrete path will be within the basin.
- The basin will have a concrete spillway.
- Storm drains are not included in the estimate

2007_05_15 memo re basin cost.doc

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Orcutt Area Specific Plan: Park Land Allocations:

A. Central neighborhood park	
• Western sector	4.9 acres
• Eastern sector	4.6 acres
• School joint use	1.3 acres
• Sector east of creeks (Righetti)	1.0 acres
• Sector east of creeks (Garay proportional to hsg.)	<u>0.8 acres</u>
Subtotal	12.6 acres
B. Trail junction park at base of Reghetti Hill (for skateboard?)	1.5 acres
C. Pocket Park (intersection of C and D streets to creek)	0.5 acres
D. Allocation of Linear Park System (extreme ends)	1.2 acres
Total	14.3 acres



Costs related to revised park system of 3/4/08 (not finalized)

I. Land acquisition (prime land same as residential; bike, and secondary land at 50% - essentially \$11.50 and \$5.75/square foot)

A. Central Neighborhood Park	
1. Righetti Ranch allocation: central park @ 11.8 acres	\$ 5, 911,000
2. Garay (park in proportion to residential) @ 0.8 acres	200,000
B. Pocket Park: Righetti land 0.5 acres at residential value	250,000
C. Allocation of Linear Park System: 1.2 acres @ 50%	301,000
Total land costs	\$ 6,666,200

II. Improvement Costs (based upon concept plans presented to Parks and Recreation Commission but no skate park)

A. Central Neighborhood Park	
1. Main portion south of creeks	\$3,628,000
2. Phase 2 portions north of creeks (need to refine estimate)	500,000
B. Pocket Park: Righetti land 0.5 acres	220,000
D. Allocation of Linear Park System: 1.2 acres	100,000
Total land costs	\$ 4,448,000



June 18, 2008

City of San Luis Obispo Planning Commission
C/O Michael Codron, Associate Planner
Community Development Department
919 Palm Street, San Luis Obispo, CA 93401-3218

RE: Orcutt Area Park Requirements

Dear Planning Commission:

The issue of the amount of park land to be supplied in the Orcutt Area Specific Plan has turned into a complicated discussion. The plan, as submitted in 2002, met the 20 plus acres of required park land in part because much of the area adjacent to the railroad was functioning as a linear park. This assumption is no longer supportable given the complex detention basin design that is now required. The Public Facilities Financing Plan (PFFP) assumes that there is a current deficit of 6.1 acres with a value for land and facilities of \$4.8 million.

The PFFP did not have benefit of some later thinking, which incorporated 1.5 acres of pocket parks and allowed one-half acre of recreational benefit for the Bike Safety Trail (which in fact is mostly recreational). Therefore, the defined deficit should be reduced to about 4.0 acres.

Two supplemental pieces of information are important:

- 1) The existing central park contains all of the hard facilities and playground etc. required to meet OASP requirements;
- 2) The land value of the 4 acre deficit is \$1.87 million given the internal replacement value for the residential land when the facility component is excluded.

The Orcutt area landowners feel that the intent of the overall recreational requirements will be met given the following:

- 48 acres of open space which will ultimately have an extensive recreational trail system;
- 1.75 acres of creeks are "captured" by the proposed park system but are not allowed to count toward actual park acreage. In fact, these creeks enhance the amenity of the parks with their trees and topography;
- The average household size is 2.19 persons. Therefore, the preponderance of the neighborhood will be populated by adults creating less emphasis on traditional park requirements and more on walking and utilization of the Railroad Safety Trail.

In conclusion, the request is that the City deem the plan with the additional pocket parks as adequate and in compliance with the General Plan.

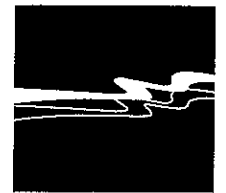
As a fall back position, 4 acres of land at the base of Righetti Hill between the east and west development areas straddling the Class I Bicycle Trail can be made available as a trail junction and picnic area to make up the deficit.

These options are shown on the attached graphic which defines the conceptual park and connecting trail system.

Sincerely,



Andrew Merriam, AICP
Consulting Planner



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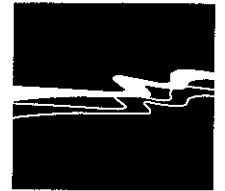
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June 18, 2008

City of San Luis Obispo Planning Commission
C/O Michael Codron, Associate Planner
Community Development Department
919 Palm Street
San Luis Obispo, CA 93401-3218

RE: OASP East-West Pedestrian/Bicycle crossing at Union Pacific Railroad

Dear Planning Commission:

The Orcutt Area landowners have asked that I summarize their concerns and express their opposition to the proposed railroad grade separated bicycle/pedestrian crossing, as identified in the EIR and Bicycle Committee recommendations. The Orcutt landowners certainly appreciate the desire of the Bicycle Committee to increase bicycle usage and facilitate connections throughout San Luis Obispo and they certainly support the extension of the bicycle safety trail parallel to the Union Pacific Railroad tracks. However, the Orcutt landowners have strong reservations about the effectiveness and cost benefits of the identified overcrossing at Industrial Way.

The Facts

- The location of the grade separated crossing has been identified as being at Industrial Way connecting to the manufacturing and service area just behind the Graduate Restaurant.
- Alternatives were analyzed. An underpass must go deep underground to allow for both structural support of the railroad and to avoid the major fiber optic corridor at this location; as such it cannot drain by gravity. Below grade conditions will make it difficult to police and maintain. The underpass will be very expensive and require extensive below grade access ramps.
- The overpass will be the equivalent of the Jennifer Street Bridge. While slightly shorter (only 3 tracks), there must be full ramps from both sides of the tracks to a greater extent than at Jennifer Street, given that the railroad is slightly above the existing grade at this location.
- Design and construction costs will be approximately \$4 million based upon the Jennifer Street crossing adjusted for inflation (more than \$4,000 per Orcutt Area household including the public housing units. In fact, based upon the costs of steel, which have increased 50% or more since the construction of the Jennifer Street structure, this estimate may be quite low.)

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- If it is assumed that the majority of the users are children, the crossing will serve a neighborhood with relatively few children (average house size under 2.2 residents/ unit), probably less than 250 elementary children total).
- The Public Facilities Financing Plan has allocated of 100% of the costs to the OASP area.
- While the OASP EIR does identify that the overpass is consistent with City General Plan, it does not call for the crossing in the transportation analysis, and no nexus of need is attached to the analysis either for the OASP area or City wide. No use factors are defined other than the identification of Marigold Center being a possible destination.

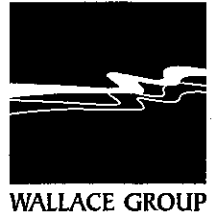
Applicant Concerns

- The majority of the school age users will reside in either the public housing or in single family units. These residences are as close to Tank Farm as they are to the proposed overpass. The residents in the northern areas can use the Orcutt Road bicycle system.
- There is relatively little demand for the bicycle/pedestrian crossing:
 - School: The San Luis Unified School District calls for a self-contained neighborhood school, which should neither import nor export bicycle/pedestrian trips.
 - Soccer fields: Kids will typically be driven if they have gear and equipment. There is a local soccer field and park on site.
 - Shopping at Marigold Center: This is typically a car trip to carry goods home from the center. (A brief survey in June 2008 determined almost no actual bicycle parking at Marigold Center).
 - Access to the Broad Street Corridor or cross town connections at Tank Farm or South Streets: The Industrial Way overcrossing will not particularly enhance access, since both Tank Farm and Orcutt Roads serve better with Class II defined bicycle routes.
- The overpass will not be a significant recreational route. It does not connect to any major recreational destinations that are not already equally well served by Tank Farm Road, which is a more scenic route than Industrial Way.
- If it is assumed that a primary use will be to feed recreational bicyclists and pedestrians to the Railroad Safety Trail, this facility is providing much broader benefits than just to the OASP area and the allocation of 100% to OASP is not reasonable.
- Tank Farm Road is a safer travel route than Industrial Way with designated bike routes and more "eyes on the street". Field evaluation of the uses along Industrial Way finds parking lots and businesses facing away from the street on the north side and a high residential block wall on the south side. None of these uses are really bicycle or pedestrian oriented. Industrial Way is a major truck route for UPS.

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Attachment 3



- The overpass will be visually detracting to the neighborhood character. The structure is completely in the open and does not have a backdrop hill like the Jennifer Street Bridge. The approach ramps from both sides will be greater than those of the Jennifer Street north ramp given the raised railroad grade at Industrial Way. Please see simulations attached.

In conclusion, the applicants' evaluation foresees very little demand for a crossing at this location. Such a crossing connects to a neighborhood with little attraction to residents in the Orcutt Area. Similarly those on the west side of the railroad wishing to connect to the bicycle safety trail will have equally good connections at Tank Farm or Orcutt Roads. The overpass will be visually out of character with the neighborhood. The owners believe that it will generate safety and policing problems just as the Jennifer Street overcrossing has but without the benefits.

In the past, landowners have been opposed to the grade separated crossing at this location based upon its marginal functionality. Now, knowing the magnitude of cost, construction of this grade separated crossing is not an effective use of funds particularly in the context of providing affordable housing, which is one of the primary goals of the Specific Plan. The landowners believe the overpass should be deleted from the Specific Plan.

Sincerely,
On behalf of the Orcutt Area landowners

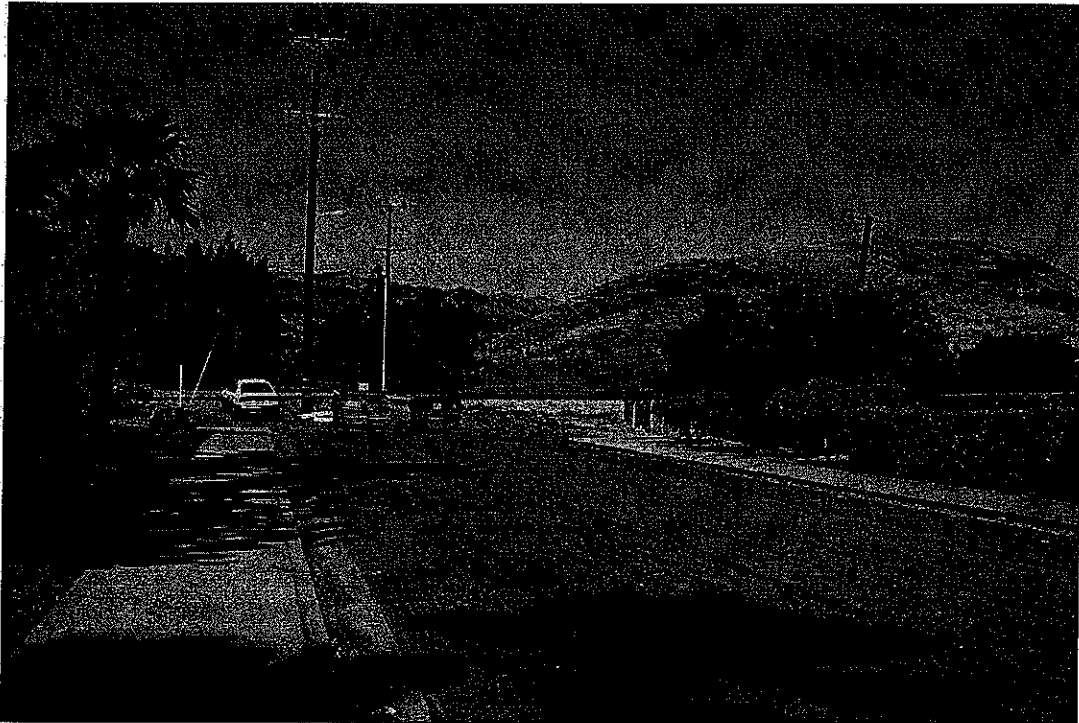


Andrew G. Merriam, AICP
Consulting Planner

Enclosures

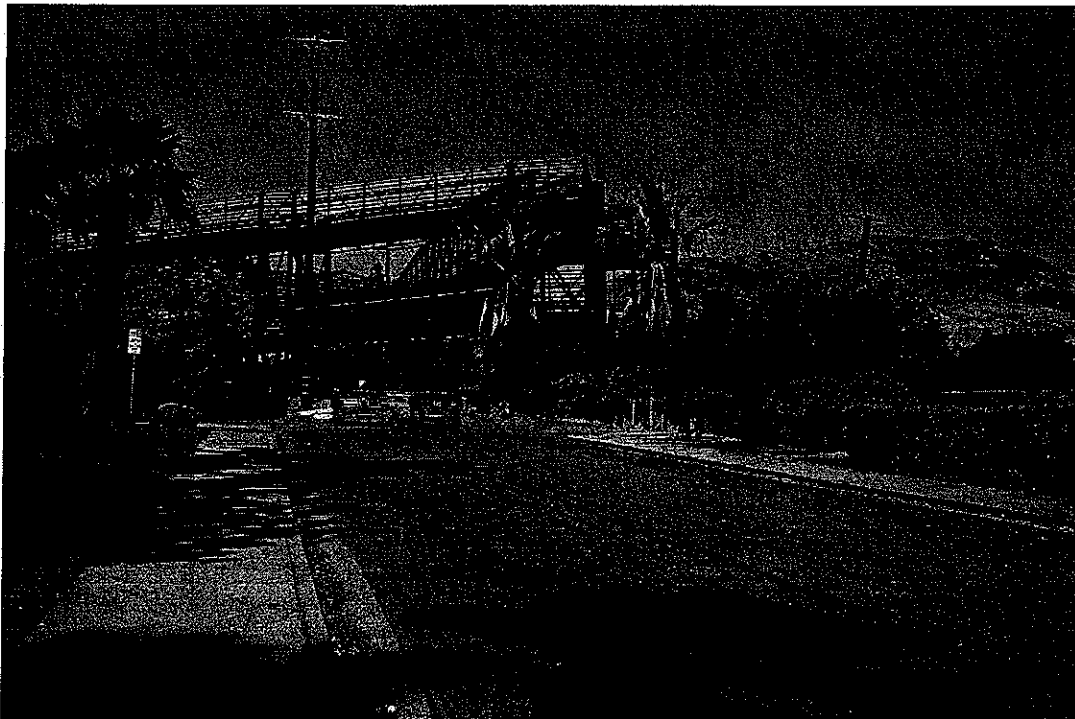
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KVA 2 - Baseline

View of existing condition at the intersection of Industrial Way and railroad right-of-way, looking east from Industrial Way, adjacent to the Graduate Restaurant.



KVA 2 - Simulation

Simulation of the proposed bridge structure based on the SLO Jennifer Street overpass. (Bottom of bridge 22' above railhead.)

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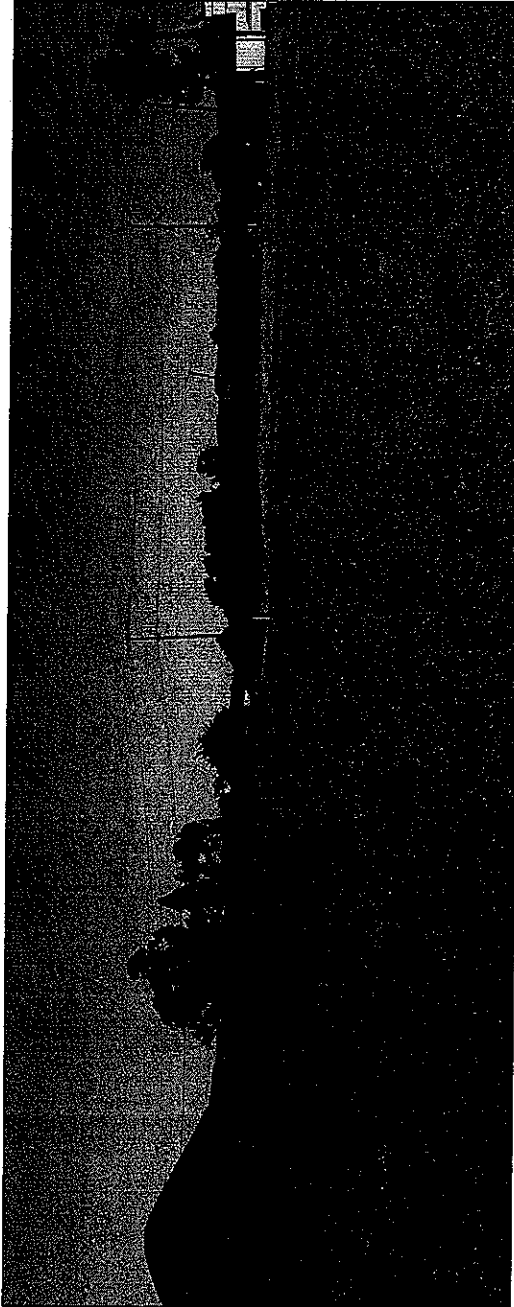


JUNE 2008



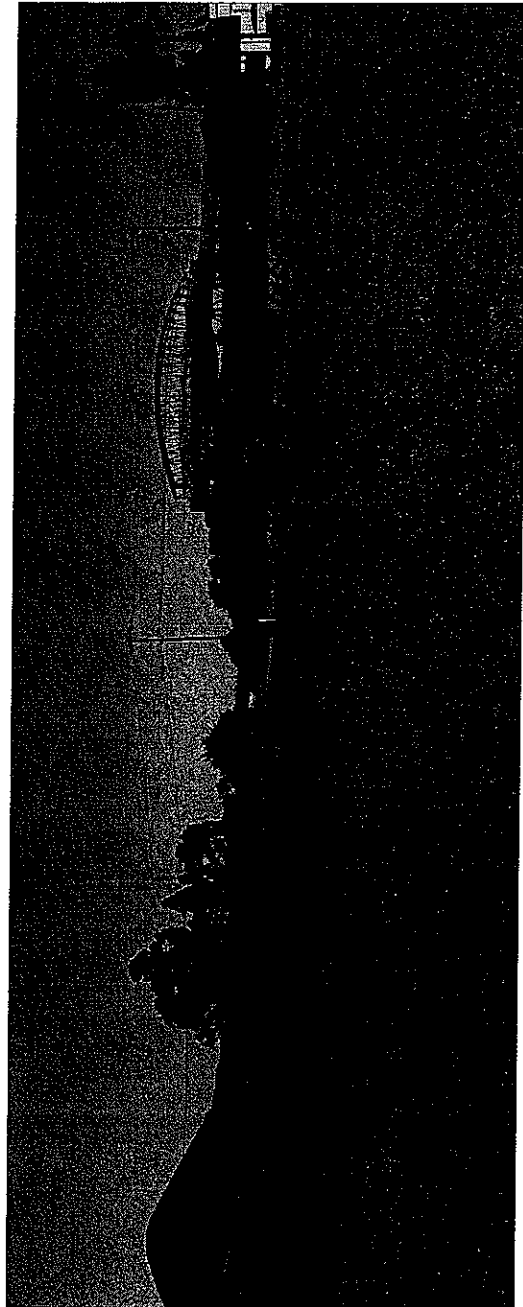
KVA 1 - Baseline

View of existing condition at the intersection of Industrial Way and railroad right-of-way looking south from the specific plan area near B' Street. Islay Hill at left, Graduate Restaurant at right.



KVA 1 - Simulation

Simulation of the proposed bridge structure based on the SLO Jennifer Street overpass. Bridge spans 3 tracks and is 22' clear above railhead, plus an additional 4 feet to compensate for the railroad embankment at this location.



ORCUTT AREA SPECIFIC PLAN

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Faint, illegible text scattered across the page, possibly bleed-through from the reverse side.