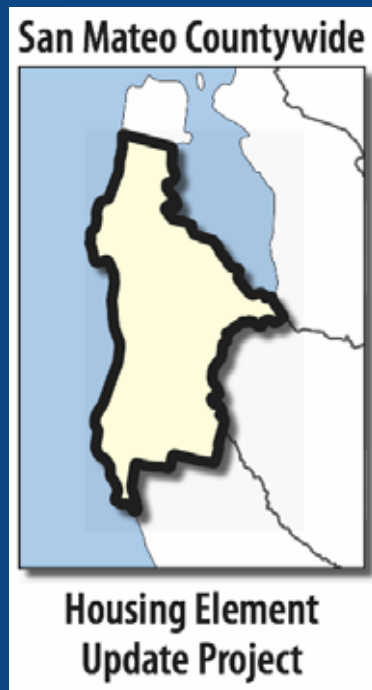


San Mateo Countywide Housing Element Update Kit (HEUK)



Technical Advisory Committee
(TAC) Meeting #2

April 24, 2008

Purpose and Approach of HEUK

- Provide Quality Products on Time for Jurisdictions to Use
- Produce Materials, Templates and Methodologies Acceptable to HCD
- Provide Opportunities for Sharing Comparative Data and Best Practices
- Save Time and Resources
- Facilitate the Housing Element Review Process with HCD

Types of Products from the “Kit”

- Nearly Complete Sections of Local Jurisdiction Housing Element *(Housing Needs, Special Needs)*
- Templates and Methodologies Acceptable to HCD *(Existing Housing Element Review, Available Land Inventory)*
- Comparative Data and Best Practices *(Potential Governmental Constraints, Menu of Housing Policies/Programs)*
- Draft Public Handouts and Information *(Fact Sheets)*

Schedule of “Kit” Products for Jurisdiction Use

- **Beginning of May, 2008**

Templates and Methodologies Acceptable to HCD (*Existing Housing Element Review, Available Land Inventory*)

- **Beginning of July, 2008**

Nearly Complete Sections of Local Jurisdiction Housing Element and Comparative Data (*Housing Needs, Special Needs, Potential Governmental and Non-Governmental Constraints, Other Sections*)

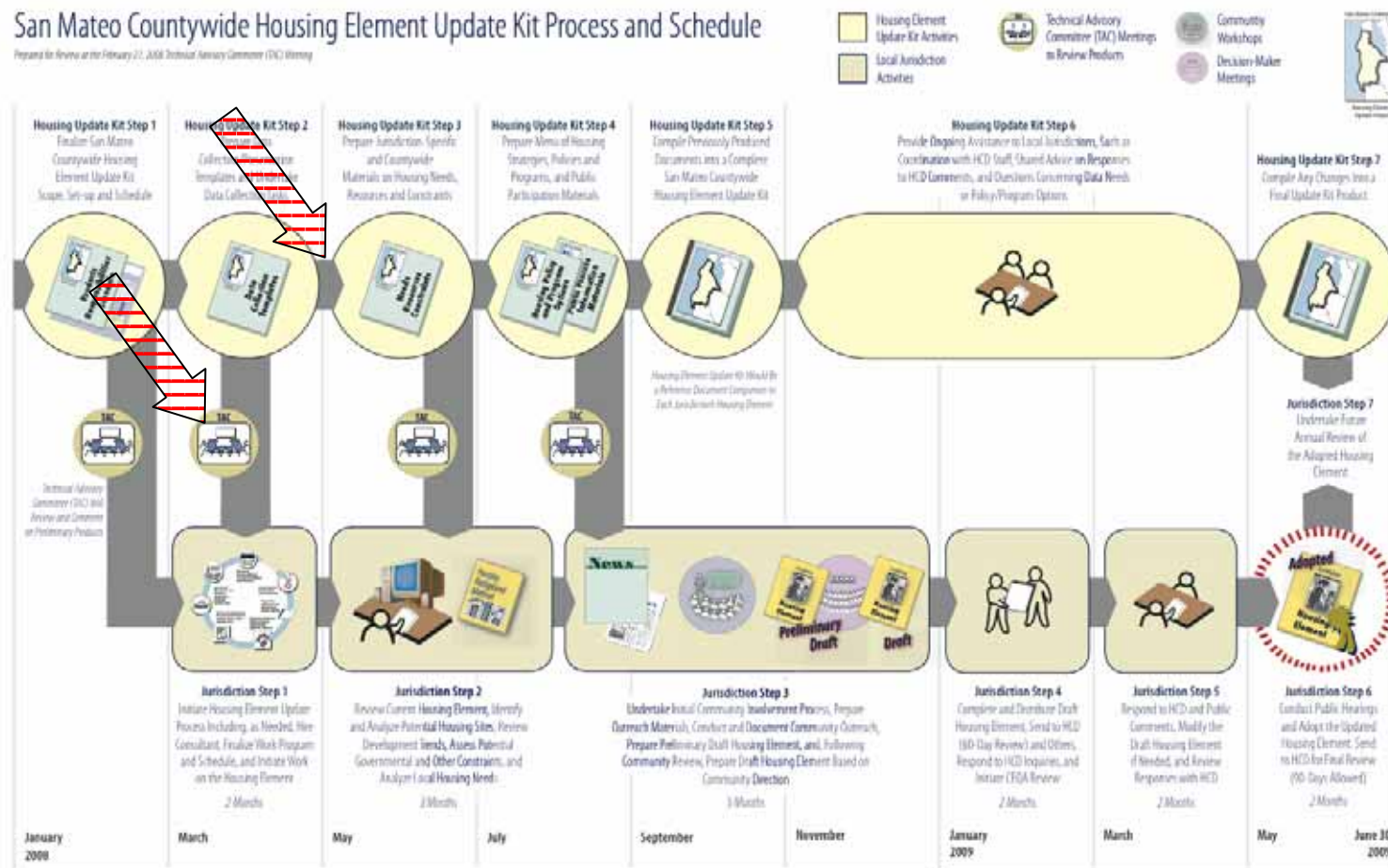
- **Beginning of September, 2008**

Best Practices and Draft Public Handouts and Information (*Menu of Housing Policies/Programs, Fact Sheets*)

Overall Schedule

San Mateo Countywide Housing Element Update Kit Process and Schedule

Prepared for Review at the February 22, 2008 Technical Advisory Committee (TAC) Meeting



Completed or In-Progress Tasks

- Meetings with Jurisdictions *(18 Jurisdictions)*
- Compilation of Returned Questionnaires *(from 12 Jurisdictions)*
- Development of Project Website *(Expected Up and Running by Mid-May)*
- Coordination with HCD
- Development of Templates and Methodologies Materials / Review with HCD *(In-Progress)*
- Initial Data Collection and Coordination
- Refinement of Project Management Needs

Next-Step Tasks

- **HEUK Task – Refinement of Templates / Methodologies**
Further Refinement and Review of Templates and Methodologies with HCD
(Week of April 29th)
- **HEUK Task – Product to Jurisdictions**
Distribution of Methodologies and Templates to Jurisdictions (Week of May 5th)
- **Jurisdiction Homework – Annotation of Current Housing Element**
Forms for Jurisdictions to Annotate Current Housing to Identify What Has Worked Well, What Might be Missing, Key Issues, Questions. (April 29 – May 19)
- **HEUK Task – Compilation of Current Housing Element Review Comments**
Jurisdiction Best Practices, Missing Topics, and Questions Based on Jurisdictions Responses (for Review at June TAC Meeting)
- **Jurisdiction Homework – Current Development Standards/Processes**
Forms for Jurisdictions to Summarize Development Standards, Fees, Processing Requirements, etc. (May – June 9)

Introduction of the Project Website

List of Initial Website Pages

Static Pages

- Home Page
- Site Map (index to all the pages on the website)
- Contact Us
- Project Background
- Resources (links to other websites and additional information)
- Jurisdiction Contact List
- Process Graphic / Timeline
- Frequently Asked Questions

Dynamic Pages

- Calendar
- Document Depository (where municipalities can upload or download documents)
- Discussion Board (where municipalities can post questions or comments and other municipalities can answer)

Introduction of the Project Website Questions

■ Forum / Discussion Section



Introduction of the Project Website Questions

Project Website Address (URL)?

- www.SMCHECK.com
- www.HEUK.com
- www.21elements.com

Summary of Jurisdiction Questionnaire and Meetings

- SB2
- Inclusionary Housing
- Mixed Use (Commercial/Residential)
Standards and Calculations
- Second Units

Previous Housing Element Review and Analysis

- Housing Element Effectiveness

Goals, Quantified Objectives, Policies and Programs
Actual Results or Outcomes of Programs
Quantified if Possible

(Use Annual Reports)

- Progress in Implementation and
Differences from Expectations

- What was Learned?

Previous Housing Element Review and Analysis

Housing Element — Evaluation of Existing Policies/Programs

Policy/Program Title <i>Ref. # and brief description</i>	Quantified Objective <i>where applicable</i>	Achievements <i>quantified if possible</i>	Barriers to Implementation <i>reasons why it was not implemented or was not able to meet its objectives</i>	Recommendations for the Housing Element Update <i>carry forward as is / carry forward with modifications (specify) / or delete</i>

Draft

Previous Housing Element Review and Analysis

- Provide HEUK Team with Electronic Copy of Previous Housing Element to Set-up Review Sheet for Your Use *(If Desired)*
- Annotate and Review Current Housing Element *(See Checklist Sample)*

Important to Carry Forward

Important to Keep with Minor Modifications Needed

Less Important

Important to Modify

Comments

CURRENT HOUSING ELEMENT REVIEW CHECKLIST/COMMENTS

Below is a checklist of current Housing Element GOALS, POLICIES and PROGRAMS. We have organized the checklist so that you can provide feedback on important items from the current Housing Element that are either (1) important to carry forward in the updated housing element, (2) important to keep but with minor modifications, (3) less important but should be carried forward, and (4) those items you feel will be critical for the Steering Committee to discuss. There is also a small space for comments next to the topics and more space at the end of this checklist for any other comments or suggestions you may have, including items you feel are not covered. We have grouped the policies by goal and referenced the corresponding programs under the goal topic by name and number. *(For more information, please consult your copy of the Housing Element)*

Current Housing Element Goals, Policies and Program

GOAL H-1

A Vital and Diverse Community — We are a balanced, vital and evolving community with a socially and economically diverse population that has preserved our small town feel and heritage, sense of community, beautiful natural environment, attractive neighborhoods, vital and diverse businesses and adequate services.

☐ IMPORTANT TO KEEP *Notes and Comments:*
☐ IMPORTANT TO KEEP BUT UPDATE
☐ LESS IMPORTANT
☐ NEED TO DISCUSS/MODIFY

POLICIES

H-1.1 Efficient Use of Land. The City shall promote creative and efficient use of vacant and built on land within its RUL to help maintain the City's preeminent agricultural environment and open space.

☐ IMPORTANT TO KEEP *Notes and Comments:*
☐ IMPORTANT TO KEEP BUT UPDATE
☐ LESS IMPORTANT
☐ NEED TO DISCUSS/MODIFY

H-1.2 Provide Adequate Sites. The City shall maintain an adequate supply of land designated for all types of residential development to meet the quantified housing need of 3,369 units and a portion of Napa County's quantified housing need of 664 units for the state-mandated time frame of the Housing Element (1999-mid 2007). Within this total, the City shall also maintain a sufficient supply of land for multi family housing to meet the quantitative housing need of 2,062 very low, low and moderate income housing units and a portion of the County's need of 534 very low, low and moderate income housing units. (amend 2/05)

☐ IMPORTANT TO KEEP *Notes and Comments:*
☐ IMPORTANT TO KEEP BUT UPDATE
☐ LESS IMPORTANT
☐ NEED TO DISCUSS/MODIFY

H-1.3 Minimum Densities. The City shall not approve development below minimum designated General Plan densities unless physical or environmental constraints preclude its achievement. If development on a site is to occur over time the applicant must show that the proposed development does not prevent subsequent development of the site to its minimum density.

☐ IMPORTANT TO KEEP *Notes and Comments:*
☐ IMPORTANT TO KEEP BUT UPDATE
☐ LESS IMPORTANT
☐ NEED TO DISCUSS/MODIFY

H-1.4 Efficient Use of Sites. The City shall make every effort to approve well-designed projects at the mid to high range of general plan densities.

☐ IMPORTANT TO KEEP *Notes and Comments:*
☐ IMPORTANT TO KEEP BUT UPDATE
☐ LESS IMPORTANT
☐ NEED TO DISCUSS/MODIFY

H-1.5 Support Density Bonuses. The City recognizes that density bonuses help achieve housing goals and shall promote their use consistent with the provisions of state law. Any projects receiving density bonuses shall incorporate long term rental rate or sales restrictions.

☐ IMPORTANT TO KEEP *Notes and Comments:*
☐ IMPORTANT TO KEEP BUT UPDATE
☐ LESS IMPORTANT
☐ NEED TO DISCUSS/MODIFY

H-1.6 Density Bonus for Multi Family. The City shall grant density bonuses of 25% to 100% for multi family projects above the maximum pod density when:

- Project impacts are mitigated
- The project incorporates the minimum qualifying units in accordance with Government Code Section 65915.
- The project provides high quality design that fits with the surrounding neighborhood and incorporates attractive and usable common/open areas.

The amount of the density bonus shall be based on the extent to which the project satisfies the third criterion, and applicants may also be given credit for optional benefits.

Optional:

- The project provides specific benefits to the neighborhood (trail, plaza, etc.)
- The project provides underground parking

☐ IMPORTANT TO KEEP *Notes and Comments:*
☐ IMPORTANT TO KEEP BUT UPDATE
☐ LESS IMPORTANT
☐ NEED TO DISCUSS/MODIFY

H-1.7 Density Flexibility for Multi Family. The City may approve, through a Use Permit Process, a housing density that exceeds the limit for its pod up to the maximum allowed by the Multi Family Residential land use category when:

- The site is within 0.5 mile distance to a transit stop and services ("services" mean retail centers where daily goods and services are provided such as markets, dry cleaners, pharmacies, deli's and similar uses).
- Project impacts are mitigated;
- The project constructs required inclusionary units onsite

Related Issues – Previous Housing Element Review and Analysis

■ Housing Element Law (AB 1233; GC Section 65584.09)

" . . . If a city or county in the prior planning period failed to identify or make available adequate sites to accommodate the regional housing need allocated, then the city or county shall, within the first year of the planning period of the new housing element, zone or rezone adequate sites to accommodate the unaccommodated portion of the regional housing need allocation from the prior planning period."

If the current element was found in compliance by HCD and the answer to either of the following questions is yes, GC Section 65584.09 generally **will not** apply:

Question	Yes	No
Did the inventory of sites required by Section 65583(a)(3) identify adequate sites?		
Were the program actions to rezone or provide adequate sites fully implemented?		

Related Issues – Previous Housing Element Review and Analysis

GC Section 65584.09 **does apply**, however, if any response to the next set of questions is yes:

Question	Yes	No
Failed to adopt an updated housing element for the prior planning period?		
Adopted a housing element found out of compliance by HCD due to failure to substantially comply with the adequate sites requirement?		
Failed to implement the adequate sites programs to make sites available within the planning period?		
Failed to identify or make available adequate sites to accommodate a portion of the regional housing need?		

Existing Conditions Analysis (Housing Needs / Special Needs)

- **Housing Costs and the Ability to Pay for Housing**
- **Population, Employment, and Housing Characteristics**
- **Lower Income Households**
- **Overcrowding**
- **Extremely Low-Income Households Housing Needs**

Extremely low-income is a subset of the very low-income housing need and is defined as 30 percent of area median and below.

Quantification of the number of existing households with extremely low- income, and a quantification of the number of projected number of households with extremely low-income households

The kind of housing available and suitable for Extremely Low-Income Households (such as Supportive Housing and Single-Room Occupancy units).

Jurisdictions must assess whether existing zoning permits those housing types.

Existing Conditions Analysis (Housing Needs / Special Needs)

- **Housing Conditions** – Estimate of the total number of substandard units (those in need of rehabilitation and repair, and those in need of replacement or demolition).
- **Assisted Housing Developments “At Risk” of Conversion**
- **Opportunities for Energy Conservation**
- **Analysis of Housing Needs for Persons with Disabilities**
- **Elderly Housing Needs**
- **Large Families and Female Headed Households Needs**
- **Farmworkers Housing Needs**

Existing Conditions Analysis (Housing Needs / Special Needs)

- **Analysis of the Needs of Families and Persons In Need of Emergency Shelters**

- **New Amendment to State Housing Element Law (SB2)**

Increases planning requirements for emergency shelters

Requires all jurisdictions have a zone in place to permit at least one year-round emergency shelter without a conditional use permit or any discretionary permit requirements

Local government is required to designate zoning within one year of the adoption of the Housing Wlement

SB 2 amended the Housing Accountability Act

Existing Conditions Analysis (Housing Needs / Special Needs)

■ Sources of Data

- US Decennial Census (1990 and 2000)
- US Economic Census (2002, 2007?)
- American Community Survey for large jurisdictions (2007)
- California Department of Finance E-5 report (2007)
- Construction Industry Research Reports by city (1997-2007)
- San Mateo County Housing Needs Study /Homelessness Study
- HCD's Division of Housing Policy Dvlpmnt/Financial Assistance (at-risk units)

■ Potential Data Sources

- Claritas (demographic data)
- DataQuick (real estate data)
- RealFacts (rental data)

Existing Conditions Analysis (Housing Needs / Special Needs)

- Tasks and Responsibilities
- Questions and Discussion?

Adequate Sites and Relationship to Potential Governmental Constraints

■ Sites Inventory and Suitability Analysis

Sites that require rezoning may be included in the inventory provided the element includes a program to rezone early within the planning period

Other characteristics to consider when evaluating the appropriateness of sites include physical features, water/sewer and location

■ Categories of Potential Housing Sites

Vacant residentially zoned sites

Vacant non-residentially zoned sites that allow residential development

Underutilized residentially zoned sites capable of being developed at a higher density or with greater intensity

Non-residentially zoned sites that can be redeveloped for, and/or rezoned for, residential use (via program actions)

Sites that are in the process of being made available for residential uses via rezones or specific plans, provided the housing element includes a program that commits the local government to completing all necessary administrative and legislative actions early in the planning period.

RHNA, Adequate Sites and Counting Housing Units

- **RHNA – Four Income Levels and Total**
- **Counting Units Built, Under Construction and/or Approved During Planning Period**

Units constructed/under construction since January 2007.

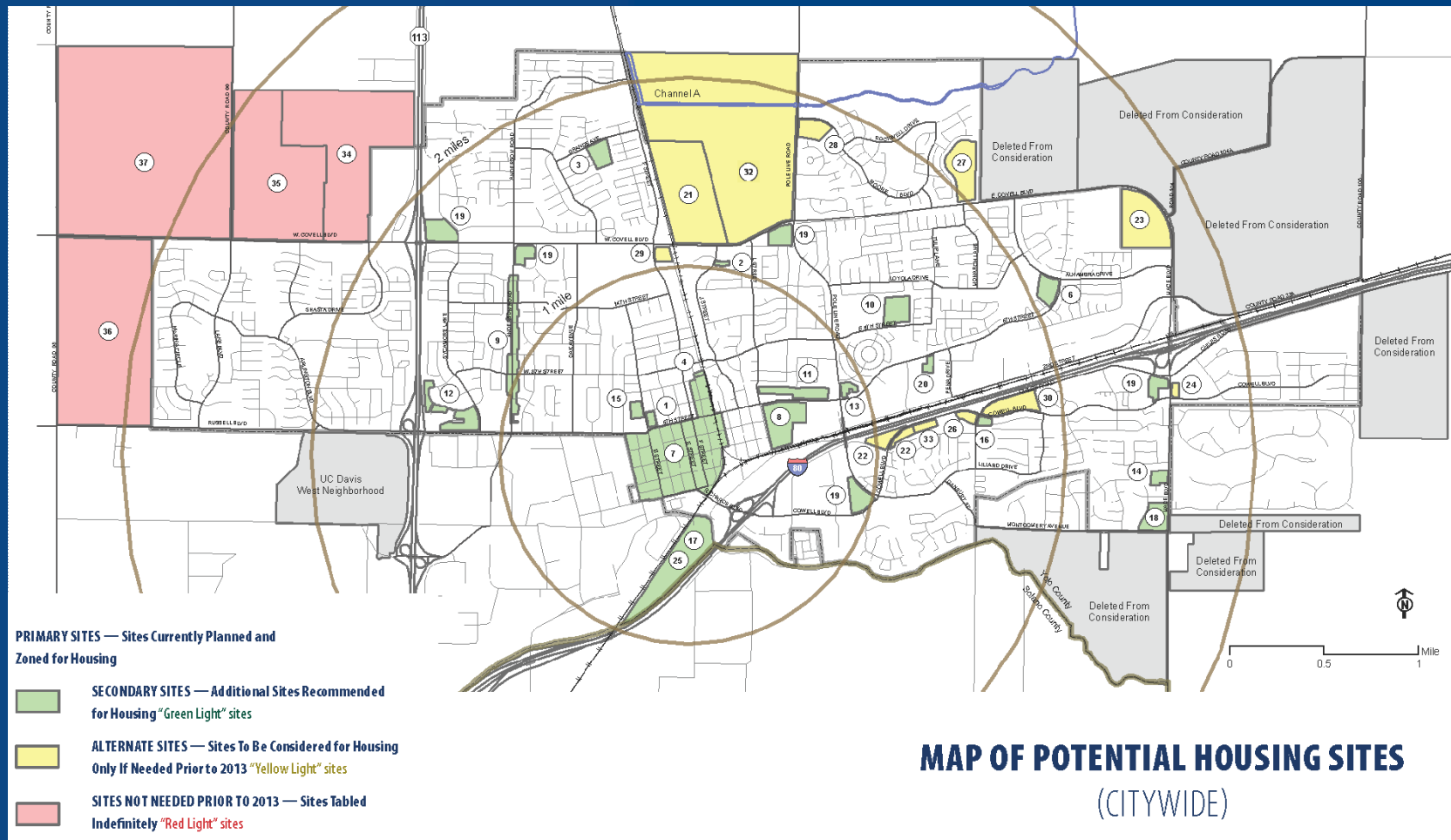
Affordable housing units must be based on (a) subsidies, financing or other mechanisms that ensure affordability, (b) actual rents, or (c) actual sales prices.

Approved Projects must demonstrate the units can be built within the remaining planning period AND demonstrate affordability to very low- or low-income households.

Adequate Sites and Relationship to Potential Governmental Constraints

- **Information Required** – The site inventory analysis must include an estimate of the number of housing units that can be accommodated on each site identified in the land inventory within the planning period
 - (a) Parcel-specific listing of sites, including the parcel number or other unique reference such as address
 - (b) General plan and zoning designations of sites
 - (c) Description of parcel size
 - (d) Map showing the location of sites
 - (e) The existing uses of any non-vacant sites
 - (f) General description of any known environmental constraints
 - (g) General description of existing or planned water, sewer, and other dry utilities supply, including the availability and access to distribution facilities

Adequate Sites and Relationship to Potential Governmental Constraints



Adequate Sites and Relationship to Potential Governmental Constraints

Study and Identification of Potential Housing Sites in Davis

Grande School Site



Location	South side of Grande Avenue between F Street and Catalina Drive
Site Size (Gross / Net Assumption)	8.4 ac / 6.0 ac
Recommended General Plan Overall Residential Density Category (net density range including density bonus)	Medium (7.2 - 16.79 du/ac)
Estimated Potential Number of Housing Units Range Per General Plan Category	43 - 101 du
Steering Committee Recommendation	50 - 75 du

Recommendations of the General Plan Update Steering Committee — Approved March 20, 2008

Rationale for Recommended Site Ranking Category and Number (Including Key Principles)

- 3.1 Close to parks and schools.
- 3.2 Adequate vehicular access to Grande Avenue, a collector street.
- 3.3 Residential use is appropriate given the existing surrounded residential uses.

Countering Views to Recommended Site Ranking Category and Number

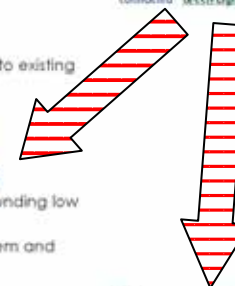
- 3.4 Difficult to integrate site with area due to existing street patterns.

Recommended Land Use and Design Considerations, Requirements or Conditions, and Any Additional Information that May be Needed for Site Development

- 3.A Design compatibility with existing surrounding low density residential uses.
- 3.B Augment of the existing greenbelt system and connections.

SECONDARY SITE Site Ranking 3

SECONDARY SITES are sites recommended for housing; they are considered "Green Light" sites



Recommended Actions and Responsibilities

Action 3.1 City should continue to consult with the DUKSD and neighbors.

Action 3.2 General Plan amendment, reporting.

Adequate Sites and Relationship to Potential Governmental Constraints

■ Examples of Other Site Inventory Considerations

Sites subject to pending litigation on environmental grounds that could impact their availability for development during the planning period

Sites included within an “infill opportunity zone” pursuant to a Congestion Management Plan (CMP) (Government Code Section 65089(a) and 65088.4) – the applicable development conditions or exemptions from traffic level of service standards should be described

An analysis demonstrating the estimate of the number of units projected on small sites, if small sites are critical to providing for adequate sites, is realistic or feasible.

Adequate Sites and Relationship to Potential Governmental Constraints

■ Realistic Development Capacity

Describe methodology used to estimate the realistic capacity for potential housing sites (not based on the theoretical maximum buildout allowed by the zoning, but should be based on all applicable land-use controls and site improvement requirements)

Consider existing development trends as well as the cumulative impact of standards such as maximum lot coverage, height, open space, parking, and FARs

Establish the housing unit capacity based on the established minimum density.

Adequate Sites and Relationship to Potential Governmental Constraints

■ Limited Land Availability

Local governments with limited vacant land resources or with infill and reuse goals may rely on non-vacant and underutilized residential sites to accommodate the regional housing need

Examples include sites with potential for recycling, scattered sites suitable for assembly, publicly-owned surplus land, portions of blighted areas with abandoned or vacant buildings, areas with mixed-used potential, substandard or irregular lots which could be consolidated, and any other suitable underutilized land.

Adequate Sites and Relationship to Potential Governmental Constraints

■ **Counting Second Units**

Include an estimate of the potential number of second units to be developed in the planning period based on an analysis that considers (a) the number of second units developed in the prior planning period, (b) community need for these types of housing units, (c) the resources and/or incentives available that will encourage the development of second-units, and (d) other relevant factors as allowed by HCD.

■ **Second-Unit Affordability**

Approach for assessing illegal second units

Second-unit affordability – (a) survey existing second units, and (b) examination of market rents for reasonably comparable rental properties to determine an average price per square foot

Special Issues and New Requirements

- SB2
- Inclusionary Housing
- Mixed Use (Commercial/Residential) Standards and Calculations
- Second Units
- Other? Questions?

HEUK Management Items and Next Steps

- Project Budget
- Coordination
- Next Steps
- Evaluation