Short Term Rental Community Survey Findings

Short Term Rental Community Meeting
May 29 & 30, 2019
Agenda

1. Background
2. Survey Results
   a) Overall Findings
   b) Short Term Rental Hosts
   c) Deep Dive
3. “Straw-man” Proposal
4. Feedback
5. Next Steps

Short Term Rental Community Meeting

May 29 & 30, 2019
Background
Background

Jan. 4, 2016 - Council asks Staff to begin monitoring STR activity as part of JDU ordinance review.

Aug. 20, 2018 - Staff provides Housing Report to City Council. Council directs staff to return with informational report on STRs.

June 10, 2016 - Staff enters into contract with Host Compliance to provide the following STR monitoring services:
- Trend Monitoring;
- Address Identification

Today - San Rafael does not prohibit, regulate, tax or enforce STRs.

Feb. 19, 2019 - Staff provides STR Informational Report to City Council. Council directs staff to conduct additional outreach and further analyze STRs regulation.
Existing Conditions

• ~286 Active Listings in 2018:
  • Increase from 150 active listings when monitoring first began in 2016.
  • 3-Bedroom Single Family Homes are the largest “host-described” property type (75-listings);

• Distributed relatively equally geographical across city:
  • Slight concentrations in West End, Gerstle Park, and Dominican neighborhoods.

• Over the last three years, the City has received less than a dozen STR related complaints.

Short Term Rental Community Meeting
May 29 & 30, 2019
## 2.19 Staff Report Analysis

<table>
<thead>
<tr>
<th>Low Estimate</th>
<th>Revenue</th>
<th>Expenditures</th>
<th>Annual Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Option</strong></td>
<td><strong>Year 1</strong></td>
<td><strong>Ongoing</strong></td>
<td><strong>With Fees Collected</strong>&lt;sup&gt;*&lt;/sup&gt;</td>
</tr>
<tr>
<td></td>
<td><strong>Fees</strong></td>
<td><strong>Fees</strong></td>
<td><strong>TOT</strong></td>
</tr>
<tr>
<td>1) Status Quo</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>2) Minimal Enforcement</td>
<td>$34,907</td>
<td>$26,576</td>
<td>$18,051</td>
</tr>
<tr>
<td>3) STR Ban</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
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</table>

<table>
<thead>
<tr>
<th>Mean Estimate</th>
<th>Revenue</th>
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<th>Annual Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Option</strong></td>
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<td>$26,576</td>
<td>$39,738</td>
</tr>
<tr>
<td>3) STR Ban</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>High Estimate</th>
<th>Revenue</th>
<th>Expenditures</th>
<th>Annual Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Option</strong></td>
<td><strong>Year 1</strong></td>
<td><strong>Ongoing</strong></td>
<td><strong>With Fees Collected</strong>&lt;sup&gt;*&lt;/sup&gt;</td>
</tr>
<tr>
<td></td>
<td><strong>Fees</strong></td>
<td><strong>Fees</strong></td>
<td><strong>TOT</strong></td>
</tr>
<tr>
<td>1) Status Quo</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>2) Minimal Enforcement</td>
<td>$34,907</td>
<td>$26,576</td>
<td>$105,183</td>
</tr>
<tr>
<td>3) STR Ban</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>

* Program fees are calculated as cost-recovering for program expenses. If fees are collected, Year 1 and Ongoing program balances would be the same as they reflect the TOT Revenue collected that year.
Community Survey: Overall Findings
Who took the survey?

Answered: 409    Skipped: 0

Q1 Which option best describes you?

- I am a Homeowner in San Rafael: 61.65%
- I am a Renter in San Rafael: 14.18%
- I own property in San Rafael but do not live here: 1.96%
- I am a property manager in San Rafael: 0.98%

Q2 How long have you lived in your current home?

- Less than 1 year: 5.87%
- 1-5 years: 27.14%
- 5-10 years: 18.58%
- 10-15 years: 9.29%
- 15+ years: 39.12%
Who took the survey?

**Q20 What is your race?**

- White or Caucasian: 80.80%
- Black or African American: 4.00%
- Hispanic or Latino: 3.73%
- Asian or Asian American: 0.80%
- Native Hawaiian or other Pacific Islander: 0.00%
- Another race: 10.40%

**Q21 What is your age?**

- Under 18: 0.27%
- 18-24: 1.33%
- 25-34: 4.80%
- 35-44: 12.27%
- 45-54: 23.47%
- 55-64: 24.00%
- 65+: 33.87%

**Q23 If yes, which San Rafael neighborhood do you live in?**

- downtown: 5.92%
- Terra Linda: 9.37%
- Fairmont: 8.54%
- Gerstle Park: 7.16%
- Dominican: 6.61%
- West End: 6.61%
- Other (please specify): 5.79%
- Pleasant Grove: 4.96%
- Sun Valley: 4.88%
- Best Place: 4.41%
- Lincoln/San Rafael HRO: 4.13%
- Glenwood: 3.58%
- Serra Venetian: 3.03%
- Country Club: 2.79%
- Lucas Valley: 2.75%
- Canal: 2.20%
Overall Findings

- **40% (155).** San Rafael should allow Short-Term Rentals but regulate them.
- **22% (84).** San Rafael should ban Short-Term Rentals.
- **33% (128).** San Rafael should leave Short-Term Rentals unregulated.
- **4% (17).** Not Sure/ Undecided.

Short Term Rental Community Meeting
May 29 & 30, 2019
Overall Findings

Are you aware of any Short-Term Rentals in your neighborhood?

- No: 43.84% (176)
- Yes: 56.16% (228)

Short Term Rental Community Meeting
May 29 & 30, 2019
Overall Findings

Are you aware of any Short-Term Rentals in your neighborhood?

- Yes: 56.16% (228)
- No: 43.84% (178)

If yes, have the Short-Term Rentals caused any problems?

- Yes: 41.41% (94)
- No: 58.59% (133)
Overall Findings

Short Term Rental Community Meeting
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If yes, please choose the option(s) below that best describes the problem.
Overall Findings

How concerned are you about the following challenges related to Short-Term Rentals?

<table>
<thead>
<tr>
<th>Challenge</th>
<th>1- Not Concerned</th>
<th>2- A Little Concerned</th>
<th>3- Concerned</th>
<th>4- Very Concerned</th>
<th>No Opinion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Impacts on Neighborhood Character</td>
<td>41%</td>
<td>12%</td>
<td>12%</td>
<td>34%</td>
<td>1%</td>
</tr>
<tr>
<td>Party Houses</td>
<td>35%</td>
<td>18%</td>
<td>16%</td>
<td>32%</td>
<td>2%</td>
</tr>
<tr>
<td>Parking</td>
<td>41%</td>
<td>14%</td>
<td>14%</td>
<td>30%</td>
<td>1%</td>
</tr>
<tr>
<td>Noise</td>
<td>35%</td>
<td>17%</td>
<td>16%</td>
<td>28%</td>
<td>1%</td>
</tr>
<tr>
<td>Loss of Long-Term Housing</td>
<td>41%</td>
<td>14%</td>
<td>14%</td>
<td>27%</td>
<td>3%</td>
</tr>
<tr>
<td>Strangers in the Neighborhood</td>
<td>41%</td>
<td>16%</td>
<td>16%</td>
<td>26%</td>
<td>1%</td>
</tr>
<tr>
<td>Resident Displacement</td>
<td>41%</td>
<td>16%</td>
<td>16%</td>
<td>25%</td>
<td>4%</td>
</tr>
<tr>
<td>Personal Security</td>
<td>41%</td>
<td>16%</td>
<td>15%</td>
<td>24%</td>
<td>1%</td>
</tr>
<tr>
<td>Increases in Housing Prices</td>
<td>46%</td>
<td>16%</td>
<td>15%</td>
<td>22%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Short Term Rental Community Meeting
May 29 & 30, 2019
How concerned are you about the following challenges related to Short-Term Rentals?

- Impacts on Neighborhood Character
- Party Houses
- Parking
- Noise
- Loss of Long-Term Housing
- Strangers in the Neighborhood
- Resident Displacement
- Personal Security
- Increases in Housing Prices

"Party Houses" was the only issue where delta between Not Concerned and Very Concerned was near zero.

All others “Not Concerned” was largest response.
### Overall Findings

**Short Term Rental Community Meeting**  
May 29 & 30, 2019

<table>
<thead>
<tr>
<th>Requirement</th>
<th>1- Not a Priority</th>
<th>2- A Minor Priority</th>
<th>3- A Major Priority</th>
<th>4- The Single Biggest Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ban all short-term rentals</td>
<td>73%</td>
<td>63%</td>
<td>3%</td>
<td>15%</td>
</tr>
<tr>
<td>Require owner lives at the property</td>
<td>10%</td>
<td>22%</td>
<td>26%</td>
<td>13%</td>
</tr>
<tr>
<td>Require 24-hour local contact</td>
<td>15%</td>
<td>15%</td>
<td>29%</td>
<td>13%</td>
</tr>
<tr>
<td>Limit number of guests or occupants</td>
<td>28%</td>
<td>28%</td>
<td>41%</td>
<td>12%</td>
</tr>
<tr>
<td>Require additional parking</td>
<td>38%</td>
<td>15%</td>
<td>29%</td>
<td>12%</td>
</tr>
<tr>
<td>Require 24-hour local contact</td>
<td>28%</td>
<td>28%</td>
<td>41%</td>
<td>12%</td>
</tr>
<tr>
<td>Require rules be posted in rental</td>
<td>28%</td>
<td>28%</td>
<td>41%</td>
<td>9%</td>
</tr>
<tr>
<td>Limit short-term rentals to one per resident</td>
<td>48%</td>
<td>20%</td>
<td>30%</td>
<td>8%</td>
</tr>
<tr>
<td>Require short-term rentals pass a safety inspection</td>
<td>35%</td>
<td>25%</td>
<td>35%</td>
<td>7%</td>
</tr>
<tr>
<td>Require notification of neighbors of a new listing</td>
<td>41%</td>
<td>15%</td>
<td>26%</td>
<td>7%</td>
</tr>
<tr>
<td>Require exterior signage</td>
<td>35%</td>
<td>15%</td>
<td>15%</td>
<td>5%</td>
</tr>
</tbody>
</table>
## Overall Findings

### Short Term Rental Community Meeting

**May 29 & 30, 2019**

<table>
<thead>
<tr>
<th>Requirement</th>
<th>% of “Single Biggest/ Major Priority” responses</th>
<th>% of “Not A Priority” response for 5 Regulations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ban all short-term rentals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Require owner lives at the property</td>
<td></td>
<td></td>
</tr>
<tr>
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<tr>
<td>Require exterior signage</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

How would you prioritize the following Short-Term Rental regulations?

- Ban all short-term rentals
- Require owner lives at the property
- Require additional parking
- Require 24-hour local contact
- Limit number of guests or occupants
- Require rules be posted in rental
- Limit short-term rentals to one per resident
- Require short-term rentals pass a safety inspection
- Require notification of neighbors of a new listing
- Require exterior signage
Community Survey:
Short-Term Rental Hosts
Have you ever been a Short-Term Rental Host?

- I am not a host. 66% (254)
- I am currently a host. 15% (57)
- I have thought about being a host. 14% (53)
- I have been a host but am no longer active. 5% (18)

Have you ever been a Short-Term Rental Host?

- Yes, I currently live at the property. 84% (104)
- Yes, I have multiple properties. 2% (2)
- No, I would like to list a property I do not live at. 14% (18)
Short-Term Rental Hosts

Have you ever been a Short-Term Rental Host?

- I am not a host. 66% (254)
- I have thought about being a host. 14% (53)
- I am currently a host. 15% (57)
- I have been a host but am no longer active. 5% (18)

Please select the type of listing you would host?

- An Accessory Dwelling Unit or Junior Dwelling Unit 24% (30)
- Whole house 30% (37)
- A room in a house 32% (40)
- Other (please specify) 14% (18)

Short Term Rental Community Meeting
May 29 & 30, 2019
Short-Term Rental Hosts

Why do you want to host a Short-Term Rental?

- It provides additional income: 43% 
- It helps me pay my mortgage: 28% 
- I have extra space: 31% 
- I enjoy the sharing economy: 29% 
- I enjoy entertaining and meeting new people: 29% 
- I enjoy promoting San Rafael: 32% 
- I do not want to manage a long-term rental: 19%

Short Term Rental Community Meeting
May 29 & 30, 2019
**Short-Term Rental Hosts**

**Why do you want to host a Short-Term Rental?**

<table>
<thead>
<tr>
<th>Reason</th>
<th>1- Not a Reason</th>
<th>2- A Minor Reason</th>
<th>3- A Major Reason</th>
<th>4- The Single Biggest Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>It provides additional income.</td>
<td>4%</td>
<td>9%</td>
<td>43%</td>
<td>44%</td>
</tr>
<tr>
<td>It helps me pay my mortgage.</td>
<td>14%</td>
<td>15%</td>
<td>28%</td>
<td>43%</td>
</tr>
<tr>
<td>I have extra space.</td>
<td>28%</td>
<td>28%</td>
<td>22%</td>
<td>12%</td>
</tr>
<tr>
<td>I enjoy the sharing economy.</td>
<td>26%</td>
<td>26%</td>
<td>22%</td>
<td>12%</td>
</tr>
<tr>
<td>I enjoy entertaining and meeting new people</td>
<td>30%</td>
<td>24%</td>
<td>29%</td>
<td>7%</td>
</tr>
<tr>
<td>I enjoy promoting San Rafael</td>
<td>85%</td>
<td>20%</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>I do not want to manage a long-term rental</td>
<td>54%</td>
<td>26%</td>
<td>19%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Financial reasons are the main drivers for hosting Short-Term Rentals.
58% (73) of Hosts said they would be willing to pay an annual registration fee.
58% (73) of Hosts said they would be willing to pay an annual registration fee.

On average, hosts said they would be willing to pay an annual fee of $121 (including hosts who said they would not be willing to pay a fee).
Community Survey:
Non-Short-Term Rental Hosts
Deep Dive: Non-Short-Term Rental Hosts

254 Respondents (66% of all responses)

How concerned are you about the following challenges related to Short-Term Rentals?

- Impacts on Neighborhood Character
- Party Houses
- Parking
- Noise
- Loss of Long-Term Housing
- Strangers in the Neighborhood
- Resident Displacement
- Personal Security
- Increases in Housing Prices

More likely to be “Very Concerned” with Short-Term Rental Impacts

Short Term Rental Community Meeting
May 29 & 30, 2019
Deep Dive: Non-Short-Term Rental Hosts

How would you prioritize the following Short-Term Rental regulations?

- Ban all short-term rentals
- Limit number of guests or occupants
- Restrict number of days rented per year
- Require owner lives at the property
- Require additional parking
- Require 24-hour local contact
- Require rules be posted in rental
- Limit short-term rentals to one per resident
- Require short-term rentals pass a safety inspection
- Require notification of neighbors of a new listing
- Require exterior signage

While “Very Concerned,” a Short-Term Rental Ban was not considered a priority by majority of non-host respondents.
Instead similar regulations as survey overall were identified, only with higher priority...

...Number of days rented per year is the only new regulation considered a priority.

**Deep Dive: Non-Short-Term Rental Hosts**

<table>
<thead>
<tr>
<th>Regulation</th>
<th>1st</th>
<th>2nd</th>
<th>3rd</th>
<th>4th</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ban all short-term rentals</td>
<td>50%</td>
<td>9%</td>
<td>17%</td>
<td>20%</td>
</tr>
<tr>
<td>Limit number of guests or occupants</td>
<td>15%</td>
<td>19%</td>
<td>50%</td>
<td>20%</td>
</tr>
<tr>
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<td>20%</td>
<td>15%</td>
<td>40%</td>
<td>17%</td>
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<tr>
<td>Require owner lives at the property</td>
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<td>10%</td>
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<tr>
<td>Require additional parking</td>
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<td>20%</td>
<td>37%</td>
<td>16%</td>
</tr>
<tr>
<td>Require 24-hour local contact</td>
<td>15%</td>
<td>77%</td>
<td>40%</td>
<td>13%</td>
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<tr>
<td>Require rules be posted in rental</td>
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<td>22%</td>
<td>50%</td>
<td>11%</td>
</tr>
<tr>
<td>Limit short-term rentals to one per resident</td>
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<td>10%</td>
<td>10%</td>
<td>5%</td>
</tr>
<tr>
<td>Require short-term rentals pass a safety inspection</td>
<td>10%</td>
<td>25%</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Require notification of neighbors of a new listing</td>
<td>33%</td>
<td>92%</td>
<td>93%</td>
<td>93%</td>
</tr>
<tr>
<td>Require exterior signage</td>
<td>33%</td>
<td>92%</td>
<td>93%</td>
<td>93%</td>
</tr>
</tbody>
</table>

**Short Term Rental Community Meeting**

May 29 & 30, 2019
When non-host respondents who were supportive of a ban are removed...

...again, similar regulations as survey overall were identified, only with higher priority

**Deep Dive: Non-Short-Term Rental Hosts**

- Require additional parking
- Limit number of guests or occupants
- Require 24-hour local contact
- Restrict number of days rented per year
- Require rules be posted in rental
- Require owner lives at the property
- Limit short-term rentals to one per resident
- Require short-term rentals pass a safety inspection
- Require notification of neighbors of a new listing
- Require exterior signage
- Ban all short-term rentals

**Short Term Rental Community Meeting**  
May 29 & 30, 2019
Community Survey:
Supportive of Ban
Deep Dive: Supportive of Ban

Are you aware of any Short-Term Rentals in your neighborhood?

84 Respondents (22% of all responses)

48% of respondents who said they were supportive of a Short-Term Rental Ban, were unaware of Short-Term Rentals in their neighborhood.

Short Term Rental Community Meeting
May 29 & 30, 2019
Deep Dive: Supportive of Ban

How would you prioritize the following Short-Term Rental regulations?

- Ban all short-term rentals
- Require owner lives at the property
- Restrict number of days rented per year
- Limit number of guests or occupants
- Require additional parking
- Require notification of neighbors of a new listing
- Require 24-hour local contact
- Require short-term rentals pass a safety inspection
- Limit short-term rentals to one per resident
- Require exterior signage
- Require rules be posted in rental

Of the respondents who were supportive of a Short-Term Rental Ban, only 65% marked a ban as their “Single Biggest Priority”
“Straw-Man” Proposal
What is a “Straw-man” Proposal?

A “Straw-man” Proposal is a simple draft proposal intended to generate discussion of its disadvantages and to provoke the generation of new and better proposals.
## Policy Proposal

<table>
<thead>
<tr>
<th>Policy Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Occupancy Limits</strong></td>
<td>Occupancy is restricted to two people per bedroom. Properties must also be able to provide the appropriate off-street parking spaces for the occupancy they are providing.</td>
</tr>
<tr>
<td></td>
<td><em>Ex. a studio and 1-bedroom could allow 2 or less people, a 3-Bedroom house would be 6 or less people. However, a 3-Bedroom house with only one (1) off-street parking space could only allow four (4) guests.</em>*</td>
</tr>
<tr>
<td><strong>Parking Requirements</strong></td>
<td>Listings must provide one (1) off-street parking space for every four (4) guests. A minimum of one (1) off-street parking space is required per listing.</td>
</tr>
<tr>
<td></td>
<td><em>Ex. A studio and a one-bedroom listing would need to provide one (1) off-street parking space, a 2- and 3-bedroom listing would need to provide two (2) off-street parking spaces.</em></td>
</tr>
<tr>
<td><strong>Accessory Dwelling Units</strong></td>
<td>An existing Accessory Dwelling Units can be used as Short-Term Rentals only if they have received a Certificate of Occupancy prior to the effective date of the Short-Term Rental ordinance.</td>
</tr>
<tr>
<td><strong>Owner-Occupancy Requirements</strong></td>
<td>The property being used as a short-term rental must be the owner's primary residence.</td>
</tr>
<tr>
<td>Policy Element</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Registration & Fees        | Short-Term Rental hosts will be required to submit an initial registration and annual renewal. Hosts will need to pay the following registrations fees:  
  • Initial Registration Fee: $175  
  • Annual Renewal Fee: $125  
  Hosts will also be required to collect and remit TOT (10% City, 2% County) for all rentals. For hosts using Airbnb, this collection and remittance will occur automatically through their platform. |
| Safety Inspections         | As part of the registration, hosts will be required to conduct a self-certification inspection documenting their compliance with the program regulations, including:  
  • Smoke and Carbon Monoxide Detectors;  
  • Rules and Local Contact Information posted inside;  
  • Off-Street Parking Requirements |
| 24-Hour Local Contact      | Hosts will be required to have a Local Contact (within 30 miles) on file with the City whenever the listing is rented.                                                                                                                                              |
| 24-Hour Complaint Hotline  | A 24-Hour Complaint Hotline will be available to neighbors in case of disturbance.                                                                                                                                                                                      |
Meeting Questions

Survey

• How do the survey results compare to your expectations?
• What is most surprising?
• Did they change your perception of the topic? If so, how?

“Straw-man” Policy

• Is the policy in-line with the survey results?
• Would you support this policy?
  • If not, what is missing? What would you change?
Next Steps

July 15th- City Council Staff Presentation (Tentative)

• Overview of Survey Findings
• Program Design Proposal
• Draft Ordinance

July 29th- City Council Potential First Reading of Ordinance

Short Term Rental Community Meeting
May 29 & 30, 2019
Updates and Contact Information

• Staff posting updates to Short Term Rental Webpage:
  
  www.cityofsanrafael.org/short-term-rentals/

• Contact Information:
  • ethan.guy@cityofsanrafael.org
  • 415.458.2392

Short Term Rental Community Meeting
May 29 & 30, 2019