

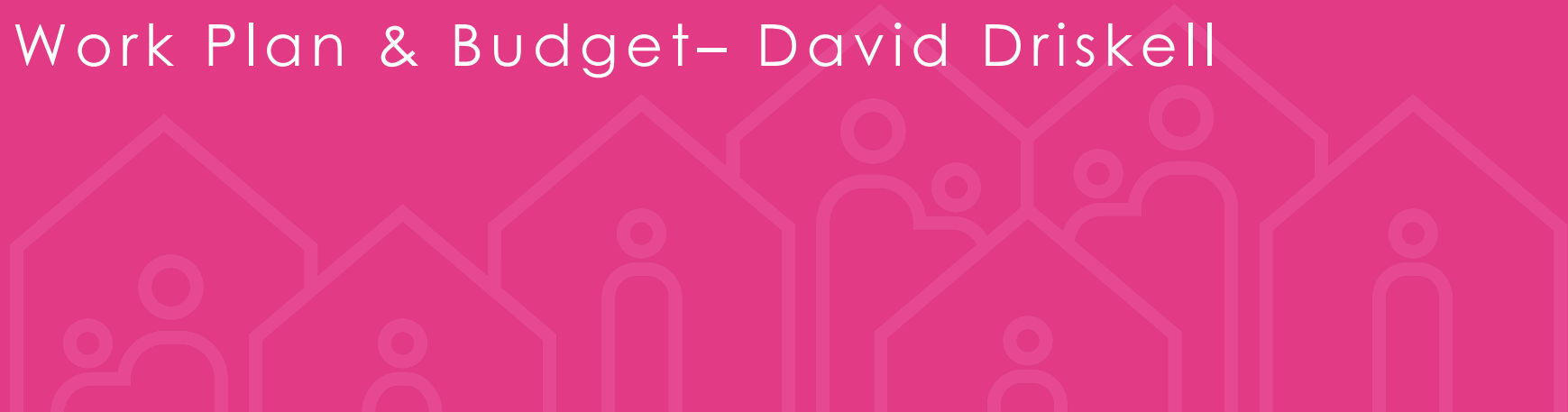
Santa Clara County Planning Collaborative

June 13, 2024



Agenda

- We're back! Welcome!
- MTC-ABAG Announcements – Manuel Ávalos
- Collaborative Updates – Samantha Dolgoff
- ADU Homeowner Survey – Avery Harmon
- ADU Plans Gallery – Bowen Close
- Collaborative Work Plan & Budget– David Driskell
- Round Robin!



MTC-ABAG Announcements

Manuel Ávalos, MTC-ABAG

- \$20 Billion Regional Housing Bond for Nov 2024 Election
- Plan Bay Area 2050+ Draft Blueprint Performance/Equity Outcomes
- Priority Conservation Area Refresh
- Tribal Consultation Toolkit
- Recording of “Working with BART on TOD” Webinar
- Additional New Products
- Local Public Fleet Electrification Planning Technical Assistance Awards
- Consultant Bench: Transportation Electrification Planning & Technical Assistance



Collaborative Updates

- Thanks for meeting with us and completing the survey!

If you haven't met with us, let's chat!

- Email tuning@planningcollaborative.com
- HE Certification – Congrats on certification!
 - Santa Clara City, Sunnyvale, Cupertino, Los Gatos, Monte Sereno
- Rezoning
 - Do we have your info right? Spreadsheet check.





Collaborative Updates

- Nexus Study – Getting close to kick off!
 - Will circulate MOU for the participating jurisdictions, CPC and the City of Sunnyvale (fiscal agent — thank you, Sunnyvale!) to review and sign.
 - Will also circulate updated scope from Strategic Economics, who has already signed off on Sunnyvale's form of contract.





ADU TA and Resources:

AB 1332/Pre-Approved
Plans Info Session

ADU Work Group

Homeowner Survey

AB 1332/Pre-Approved Plans Info Sessions

Jurisdictions must create a program to pre-approve ADU plans by January 1, 2025

Info Session 1: June 3rd

- Introduction to the law and legal requirements with Goldfarb & Lipman LLP

Future Info Sessions TBD

- Panel discussion with building officials on existing pre-approved plans
- Best practices for establishing a review process

ADU Work Group

Encourage ADU development across Bay Area jurisdictions to help meet housing goals

July 2024 to March 2025

5 workshop sessions:

- State laws
- Encourage affordable ADUs
- General homeowner support
- Staff resources



ADU Homeowner Survey

Goal

- Help document the affordability of new ADUs and meet Housing Element monitoring requirements.

Challenge

- Difficult for cities to collect relevant data (few responses, challenge to administer, etc.)

Solution

- ABAG coordinates a **VOLUNTARY, opt-in** survey for interested jurisdictions to distribute to homeowners building ADUs.

Key Details

Survey shaped by jurisdiction staff and verbally approved by HCD.

All interested jurisdictions use the same online form.

Collected data will be shared with each jurisdiction quarterly in Year 1; then annually.

Aggregated data will be available annually.



Survey Participation

100% OPTIONAL for jurisdictions - see options below

- Don't use survey
- Suggest voluntary completion of survey by homeowners
- Require survey to be completed as part of approval process (distribute to applicants at time of Building Permit or Certificate of Occupancy.)

ADU Resources

- **Website**
- Instructions for jurisdictions
- Handouts for homeowners

ADU Affordability Survey Tool

[← BACK TO TECHNICAL ASSISTANCE](#)

RELATED TECHNICAL ASSISTANCE

Zoning for Affordability
Guidance / Tool / Toolkit, Knowledge Sharing

To help document the affordability of new ADUs, the RHTA Program is launching an [online survey tool](#) to help jurisdictions meet ADU monitoring requirements made in their Housing Elements. The survey was developed in consultation with an advisory group of jurisdiction staff and has been reviewed by HCD.

Participation is optional. Participating cities or counties should plan on asking (or requiring) homeowners to fill out the survey as part of the ADU building approval process. [Read more about the jurisdiction process and instructions.](#)

Staff are hosting two information sessions to provide an overview of the survey.

- **Session 1: June 24, 2 pm** [Join via this Zoom Link](#) – registration is not required
- **Session 2: June 25, 3 pm** [Link to the Zoom meeting](#) – registration is not required

The survey will also be presented at County Collaborative meetings. We welcome your feedback on this new initiative. Contact Avery Harmon, harmon@planningcollaborative.com, for more information.

TOPICS
[Housing](#)
[Housing Elements](#)
[Creating Housing Choices ADUs & JADUs](#)

TYPE
[Guidance / Tool / Toolkit](#)

SOURCE:
[Community Planning Collaborative](#)

Related: [Housing TA](#), [RHTA](#)

Development Process and Data Collection

Survey Questions

ADU Homeowner Survey
[View the survey.](#) →

Survey Instructions for Jurisdictions
[Review the instructions.](#) →

ADU Resources

- Website
- **Instructions for jurisdictions**
- Handouts for homeowners



ADU Homeowner Survey Information for Jurisdictions

This document describes how jurisdictions can use the ABAG ADU Homeowner Survey to track the affordability of new ADUs. It is particularly useful for those jurisdictions that made commitments in their Housing Element to monitor ADU affordability. Jurisdiction participation is completely optional.

Background

ABAG's Regional Housing Technical Assistance Program will soon launch an online homeowner survey to help jurisdictions meet ADU monitoring requirements made in their Housing Elements. Specifically, the survey will allow jurisdictions to document and report on the affordability of new ADUs (e.g., low-income, moderate-income, etc.) The survey was developed in consultation with a jurisdiction advisory group and has been reviewed by HCD.

Participation is 100% optional. If interested, your jurisdiction can ask (or require) homeowners to fill out the survey as part of the ADU approval process. The survey can be found here: bit.ly/ADUHomeownerSurvey

Key Next Steps

1. **Decide if your city/county wants to participate**
2. **Decide if your city/county wants the survey to be voluntary or mandatory**
3. **If the survey is mandatory, decide how your city/county will integrate the survey into your ADU approval process**

The following pages provide more information. Additional detail and sample flyers for distribution to homeowners [are available via this link](#).

Contact Avery Harmon at harmon@planningcollaborative.com for more information through June 30, 2024. After July 1, 2024, contact Hannah Diaz, hdiaz@bayareametro.com

We welcome your feedback on this new initiative.

ADU Resources

- Website
- Instructions for jurisdictions
- Handouts for homeowners

Logo Here

ADU Survey


REQUIRED

[CITY/COUNTY] requires homeowners to complete a brief survey about their Accessory Dwelling Unit (ADU) in order to receive an ADU Building Permit. Please follow the link below to complete your survey.

The purpose of this survey is to help **[CITY/COUNTY]** understand how ADUs are being used and respond to state requests for data about ADU rents. If you do not yet know the answer to a specific question (like how much rent you plan to charge), provide your best estimate based on what you know now.

The survey asks for your email address. You have the option of completing a paper survey if you do not want to provide your email address.

To complete the survey, please go to: bit.ly/ADUHomeownerSurvey



After completing the survey, you will receive an email confirmation you can use as your proof of completion. **[Insert additional instructions e.g. please provide a copy of your confirmation email with your building permit application]**

Questions, please contact:
[JURISDICTION POINT OF CONTACT NAME, PHONE AND EMAIL]

The survey is hosted by The Association of Bay Area Governments (ABAG). Please note that ABAG may be required by law to disclose the responses to a survey, including a survey respondent's email address.

Logo Here


ADU Survey

[CITY/COUNTY] requests that homeowners complete a brief survey as part of the Accessory Dwelling Unit (ADU) application process. Please follow the link below to complete your survey.

The purpose of this survey is to help **[CITY/COUNTY]** understand how ADUs are being used and respond to state requests for data about ADU rents. If you do not yet know the answer to a specific question (like how much rent you plan to charge), provide your best estimate based on what you know now.

The survey does not ask for your name or address.

To complete the survey, please go to: bit.ly/ADUHomeownerSurvey



Questions? Please contact:
[JURISDICTION POINT OF CONTACT NAME, PHONE AND EMAIL]

The survey is hosted by The Association of Bay Area Governments (ABAG). Please note that ABAG may be required by law to disclose the responses to a survey, including a survey respondent's email address.



ADU Survey Content

1. County
2. City or Community
3. Who do you expect to live in your ADU?
4. How many square feet will your ADU be?
5. How many bedrooms does it have?
6. What do you expect the approximate monthly rent to be?
7. Which utilities will the tenant pay for (in full or part)
8. Are you in a city/town/county that requires you to fill out this survey?
9. Please provide your email address as the homeowner.
10. Do you want to answer optional demographic questions?

ADU Survey Content

11. What is the age of the head of your household?
12. What is the race of the head of your household?
13. If another race was selected above, please specify.
14. What is the primary language spoken in your home?
15. If another language was selected above, please specify.
16. What is the number of people who live in your household?
17. What is your household income?

Thank You



Association of Bay Area Governments



Technical Assistance
for Local Planning

HOUSING

AB 1332/Pre-Approved Plans Info Session

Future Sessions TBD

ADU Workgroup:

June 2024 - March 2025

Contact: dolgoff@planningcollaborative.com

ADU Homeowner Survey Info Session:

June 25, 2 PM - 3 PM

June 26, 3 PM - 4 PM

Contact: harmon@planningcollaborative.com

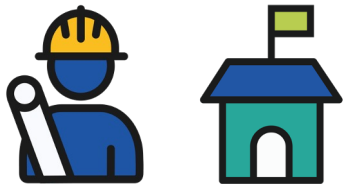
ADU Plans Gallery

Bowen Close



Overview

Online, customized gallery of ADU plans listings for each jurisdiction



Designers and Jurisdictions each have their own account

- Designers add listings
- Jurisdictions select listings

A screenshot of a web application interface for viewing ADU plans. On the left is a 'FILTERS' sidebar with sections for 'See Pre-Approved Plans Only', 'Construction Type' (Site-Built, Prefabricated), 'Square Footage' (a slider from 400 to 1,000 SF), 'Bedrooms' (Studio, 1, 2, 3+), and 'Features' (All-electric, In-unit washer/dryer, WUI certified, Net Zero certified, Solar-ready, Accessibility features, Turnkey project). On the right is a grid of four plan cards. Each card has a 'PRE-APPROVED PLAN' badge, a photo of the house, a title, a designer name, and details on size, construction type, and room count. Each card includes a 'SEE PLAN' button and a heart icon for favorites.

FILTERS

See Pre-Approved Plans Only ?

Construction Type

Site-Built (8) ?

Prefabricated (4) ?

Square Footage ?

400 SF 1,000 SF

Bedrooms

Studio (1)

1 (6)

2 (4)

3+ (0)

Features

All-electric (11) ?

In-unit washer/dryer (10) ?

WUI (wildland urban interface) certified (5) ?

Net Zero certified (2) ?

Solar-ready (12) ?

Accessibility features (9)

Turnkey project (5) ?

PRE-APPROVED PLAN

Klassen 2BR HOUSETECH

Medium - 610 SF Prefabricated

2 Bedrooms 1 Bathroom

SEE PLAN

PRE-APPROVED PLAN

Sonoma HATI HOMES

Medium - 569 SF Site-built

1 Bedroom 1 Bathroom

SEE PLAN

PRE-APPROVED PLAN

Sierras HOUSETECH

Small - 460 SF Prefabricated

1 Bedrooms 1 Bathroom

SEE PLAN

PRE-APPROVED PLAN

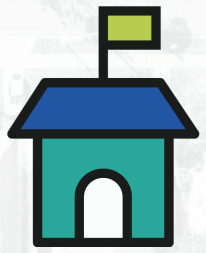
Library Cottage HOMETECH

Medium - 690 SF Site-built

1 Bedroom 1 Bathroom

SEE PLAN

How it works for jurisdictions



STEP 1: Fill out your profile

- Logo
- Contacts (internal)
- Short content about ADUs in your area

Profile

MAILING ADDRESS

Street Address 1

Prepopulated

City

Prepopulated

State

Prepopulated

Postal Code

Prepopulated

PUBLIC PROFILE INFORMATION

Upload Jurisdiction Logo or Seal












This image will show on your gallery and/or calculator.

Upload File


 BROWSE

Contact instructions for homeowners (Limit 150 characters)

Briefly describe where homeowners should go for more information. This text will appear in your gallery and/or calculator with the heading "Questions about building an ADU?". Include locations and days/times, email addresses, and phone numbers. Example: "Visit city.gov/adus, email planning@city.gov, or make an appointment at our Permit Center by calling 555-555-5555."

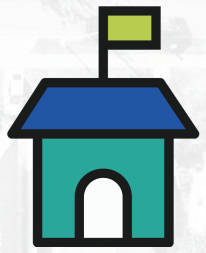
B *i* U **A:**           

Type something

Powered by  Characters : 0

SAVE

How it works for jurisdictions



STEP 1: Fill out your profile

- Logo
- Contacts (internal)
- Short content about ADUs in your area



STEP 2: Select plans (or not!)

- Existing pre-approved plans
- Pre-designed plans from our database
- Prefab plans from our database




Pre-Approved Plans

All the plans below have been marked by the designer as pre-approved in your location. You must confirm the plans below for them to show as pre-approved by your jurisdiction.

Pending Confirmation (5)

PLAN	REFERENCE	DATE SUBMITTED	ACTION
 <p>Plan name ARCHITECT</p>	NCPH19DWX	10/31/2023	<input type="button" value="CONFIRM"/> <input type="button" value="DECLINE"/>
 <p>Plan name ARCHITECT</p>	NCPH19DWX	10/31/2023	<input type="button" value="CONFIRM"/> <input type="button" value="DECLINE"/>
 <p>Plan name ARCHITECT</p>	NCPH19DWX	10/31/2023	<input type="button" value="CONFIRM"/> <input type="button" value="DECLINE"/>
 <p>Plan name ARCHITECT</p>	NCPH19DWX	10/31/2023	<input type="button" value="CONFIRM"/> <input type="button" value="DECLINE"/>

Confirmed Plans (3)

PLAN	REFERENCE	DATE SUBMITTED	ACTION
 <p>Plan name ARCHITECT</p>	NCPH19DWX	10/31/2023	<input type="button" value="REMOVE"/>
 <p>Plan name ARCHITECT</p>	NCPH19DWX	10/31/2023	<input type="button" value="REMOVE"/>
 <p>Plan name ARCHITECT</p>	NCPH19DWX	10/31/2023	<input type="button" value="REMOVE"/>

PLAN	REFERENCE	DATE SUBMITTED	ACTION
 <p>Plan name ARCHITECT</p>	NCPH19DWX	10/31/2023	<input type="button" value="CONFIRM"/> <input type="button" value="DECLINE"/>
 <p>Plan name ARCHITECT</p>	NCPH19DWX	10/31/2023	<input type="button" value="CONFIRM"/> <input type="button" value="DECLINE"/>

Select Plans

Select plans to include in your gallery. This does not include your locally pre-approved plans.

FILTERS

X CLEAR FILTERS

Construction Type

- Site-Built (3) ?
- Prefabricated (9) ?

Square Footage ?

400 SF 1,000 SF

Bedrooms

- Studio (2)
- 1 (6)
- 2 (4)
- 3+ (0)

Features

- All-electric (11) ?
- In-unit washer/dryer (10) ?
- WUI (wildland urban interface) certified (5) ?
- Net Zero certified (2) ?
- Solar-ready (12) ?
- Accessibility features (9)
- Turnkey project (5) ?

Cost

- Show me plans that are free to use ?

Where are other cost filters? ADU costs depend heavily on the ADU type and size and on your specific property. See individual listings for more cost details.



Skyview

M. GALEMORE ARCHITECT

- Large - 798 SF Site-built
- 2 Bedrooms 1 Bathroom

SEE PLAN

SELECT FOR GALLERY



Klassen 2BR

HOUSETECH

- Large - 798 SF Site-built
- 2 Bedrooms 1 Bathroom

SEE PLAN

Pre-Approved



Sonoma

HATI HOMES

- Large - 798 SF Prefabricated
- 2 Bedrooms 1 Bathroom

SEE PLAN

SELECT FOR GALLERY



Sonoma

HATI HOMES

- Large - 798 SF Prefabricated
- 2 Bedrooms 1 Bathroom

SEE PLAN

PRE-APPROVED



Skyview

M. GALEMORE ARCHITECT

- Large - 798 SF Site-built
- 2 Bedrooms 1 Bathroom

SEE PLAN

SELECT FOR GALLERY



Klassen 2BR

HOUSETECH

- Large - 798 SF Site-built
- 2 Bedrooms 1 Bathroom

SEE PLAN

SELECT FOR GALLERY



Klassen 2BR

HOUSETECH

Large - 798 SF

Site-built

2 Bedrooms

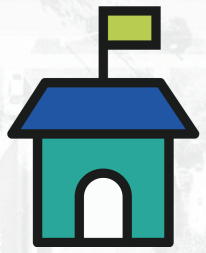
1 Bathroom

SEE PLAN

SELECT FOR GALLERY



How it works for jurisdictions



STEP 1: Fill out your profile

- Logo
- Contacts (internal)
- Short content about ADUs in your area



STEP 2: Select plans (or not!)

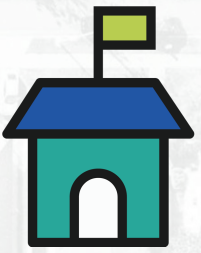
- Existing pre-approved plans
- Pre-designed plans from our database
- Prefab plans from our database



STEP 3: Launch gallery

- Help Center
- Launch materials
- Designer handouts and more ...

Ongoing maintenance and pre-approval



YOUR ONGOING TO-DO LIST:

- Confirm pre-approvals when notified
 1. Designer adds your location to their plan
 2. You receive notification and confirm or decline
- Add plans from the database
- Update contacts and custom text
- Building code cycle updates

How it works for designers



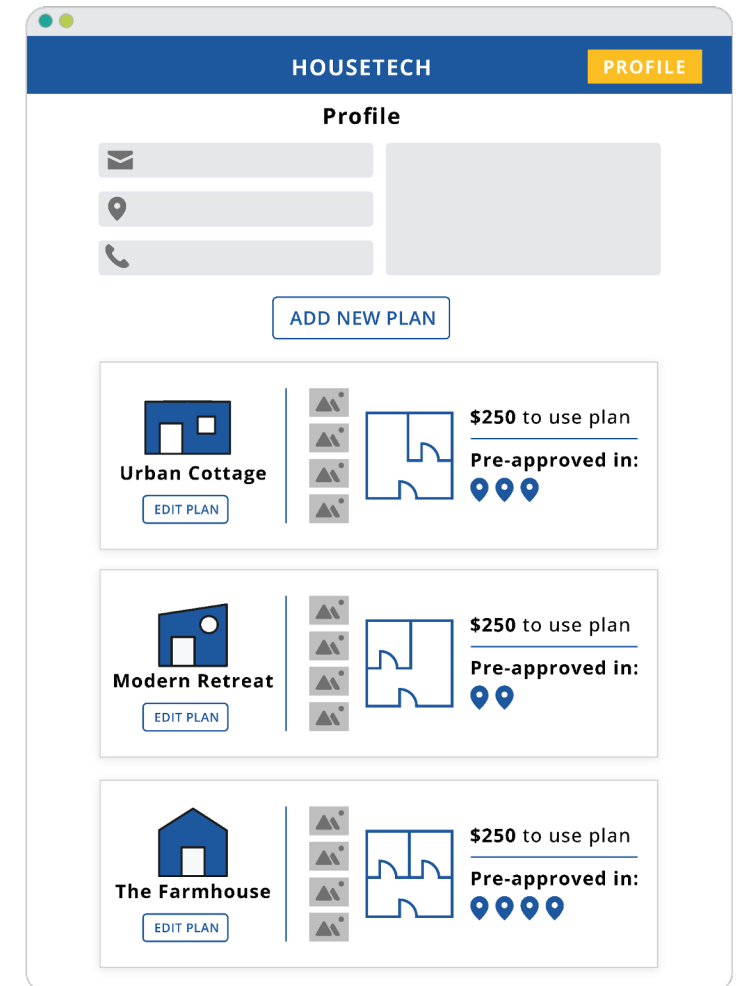
Designers have **FREE** accounts to add plans. They are always responsible for their listings.

TWO WAYS IN:

1. Get a plan pre-approved by a jurisdiction
2. Add plans to database

ADD LISTINGS (no construction drawings!):

- Basic details (size, layout, features)
- Images (renderings, photos, floorplan)
- Construction estimates, cost to use the plan
- Pre-approval locations
- Designer profile information



Next steps

- ❑ Confirm you want to set up a gallery – tell Sam Dolgoff
- ❑ Prepare profile information (logo, custom text)
- ❑ Decide who will manage your account and confirm pre-approvals submitted by designers
- ❑ Prepare to add existing pre-approved plans, if you have them (contact us for more information)
- ❑ Decide if you'll build a gallery of pre-designed and prefab plans or only pre-approved plans
- ❑ Determine your pre-approval process before 1/1/2025

**Onboarding starting late Summer 2024,
Galleries launching Fall 2024**

Thank you! For more information:



Plans Gallery Info Session on June 20
aduaccelerator.org/gallery-info-session



ADUAccelerator.org/plans-gallery



info@aduaccelerator.org



ADUAccelerator.org
BY COMMUNITY PLANNING COLLABORATIVE

Collaborative Work Plan & Budget

David Driskell





HE Implementation & Work Plan

**Thank you for filling out the survey and meeting with us!
If we haven't had a call, let's talk.**

Priority areas outlined on following slides based on:

- Survey input
- 1:1 calls
- TA requests from previous meetings





Top Priority Areas

- State Law Implementation/Compliance
- AFFH, Anti-Displacement, Tenant Support
- ADUs (Plans, Affordability Programs)
- Making Affordable Housing Happen
- Zoning Tools: Inclusionary, Affordability, Middle Income Housing



Work Plan Options

ADUs

- Plans Gallery (ongoing support)
- Affordability Program Policy Memo, Deep Dive Session

Deep Dive Sessions

- Affordable Housing Finance
- Pro-Housing Designation
- Builder's Remedy
- State Laws
- ADU Affordability Programs

Work Groups

- Anti-Displacement / Tenant Support
- Zoning for Outcomes: Affordability / Inclusionary / Missing Middle

Templates + Tools

- State Law Implementation
- Outreach & Tenant Resources

Shared Resources

- Additional Outreach Support / Engagement Software
- Shared Housing Staff



Other Suggestions?



Collaborative Funding & Governance

Contracting

- ABAG – Cities Association contract is final
- Cities Association – SCCPC contract is nearly final



Round Robin!



Next Meeting:

Thursday, July 11
12 noon - 1:30 pm

