

TWAIN HARTE COMMUNITY SERVICES DISTRICT

WATER – SEWER – FIRE – PARK
22912 Vantage Pointe Drive, Twain Harte, CA 95383
Phone (209) 586-3172 Fax (209) 586-0424

REGULAR MEETING OF THE BOARD OF DIRECTORS THCSD CONFERENCE ROOM 22912 VANTAGE POINTE DR., TWAIN HARTE July 12, 2023 9:00 A.M.

NOTICE: This meeting will be accessible via ZOOM for virtual participation.

- Videoconference Link: <https://us02web.zoom.us/j/85005953899>
- Meeting ID: 850 0595 3899
- Telephone: (669) 900-6833

AGENDA

The Board may take action on any item on the agenda.

1. Call to Order

2. Pledge of Allegiance & Roll Call

3. Reading of Mission Statement

4. Public Comment

This time is provided to the public to speak regarding items not listed on this agenda.

5. Consent Agenda:

- A. Presentation and approval of financial statements through June 30, 2023.
- B. Approval of the minutes of the Regular Meeting held on June 14, 2023.

6. New Business

- A. Discussion/action regarding water and sewer demands for Accessory Dwelling Units (ADU).
- B. Discussion/action to adopt Resolution #23-27 – Approving a Fiscal Year 2022-23 Fire Fund Budget Adjustment in the amount of \$7,700 for Engine 722 Repairs.
- C. Discussion/action to adopt Resolution #23-28 – Approving Fiscal Year 2023-24 Budget Adjustments to Modify the Part-Time Utility Maintenance Worker Position to a Full-Time Position.

- D. Presentation of Fiscal Year 2022-23 Strategic Plan progress report and semi-annual review of Strategic Plan.
- E. Discussion/action to approve General Manager Objectives for Fiscal Year 2023-24.
- F. Discussion/action to cast a vote for the Special District Risk Management (SDRMA) board of directors.

7. Reports

- A. President and Board member reports.
- B. Fire Chief's report.
- C. Water/Sewer Operations Manager's report.
- D. General Manager's report.

8. Adjourn

HOW TO VIRTUALLY PARTICIPATE IN THIS MEETING

The public can virtually observe and participate in a meeting as follows:

- **Computer:** Join the videoconference by clicking the videoconference link located at the top of this agenda or on our website. You may be prompted to enter your name and email. Your email will remain private and you may enter "anonymous" for your name.
- **Smart Phone/Tablet:** Join the videoconference by clicking the videoconference link located at the top of this agenda OR log in through the Zoom mobile app and enter the Meeting ID# and Password found at the top of this agenda. You may be prompted to enter your name and email. Your email will remain private and you may enter "anonymous" for your name.
- **Telephone:** Listen to the meeting by calling Zoom at (4669) 900-6833. Enter the Meeting ID# listed at the top of this agenda, followed by the pound (#) key.

* NOTE: your personal video will be disabled and your microphone will be automatically muted.

FOR MORE DETAILED INSTRUCTIONS, CLICK [HERE](#)

SUBMITTING PUBLIC COMMENT

The public will have an opportunity to comment before and during the meeting as follows:

- **Before the Meeting:**
 - Email comments to ksilva@twainhartecsd.com, write "Public Comment" in the subject line. In the body of the email, include the agenda item number and title, as well as your comments.
 - Mail comments to THCSD Board Secretary: P.O. Box 649, Twain Harte, CA 95383
- **During the Meeting:**
 - Computer/Tablet/Smartphone: Click the "Raise Hand" icon and the host will unmute your audio when it is time to receive public comment. If you would rather make a

comment in writing, you may click on the “Q&A” icon and type your comment. You may need to tap your screen or click on “View Participants” to make icons visible.



- Telephone: Press *9 if to notify the host that you have a comment. The host will unmute you during the public comment period and invite you to share comments.
- In-Person: Raise your hand and the Board Chairperson will call on you.

* NOTE: If you wish to speak on an item on the agenda, you are welcome to do so during consideration of the agenda item itself. If you wish to speak on a matter that does not appear on the agenda, you may do so during the Public Comment period. Persons speaking during the Public Comment will be limited to five minutes or depending on the number of persons wishing to speak, it may be reduced to allow all members of the public the opportunity to address the Board. Except as otherwise provided by law, no action or discussion shall be taken/conducted on any item not appearing on the agenda. Public comments must be addressed to the board as a whole through the President. Comments to individuals or staff are not permitted.

MEETING ETIQUETTE

Attendees shall make every effort not to disrupt the meeting. Cell phones must be silenced or set in a mode that will not disturb District business during the meeting.

ACCESSIBILITY

Board meetings are accessible to people with disabilities. In compliance with the Americans with Disabilities Act, those requiring accommodations for this meeting should notify the District office 48 hours prior to the meeting at (209) 586-3172.

WRITTEN MEETING MATERIALS

If written materials relating to items on this Agenda are distributed to Board members prior to the meeting, such materials will be made available for public inspection on the District’s website: www.twainhartecsd.com



Board Meeting Agenda Item Summary

July 12, 2023

ITEM #:	05A	ITEM TYPE:	<input type="checkbox"/> Discussion <input type="checkbox"/> Action <input checked="" type="checkbox"/> Both
SUBJECT:	Presentation and Approval of Financial Statements through June 30, 2023		
RELATION TO STRATEGIC PLAN:	<input checked="" type="checkbox"/> N/A <input type="checkbox"/> Advances Goal/Objective #'s: _____		

RECOMMENDED ACTION:

Receive and approve the financial statements through June 30, 2023

SUMMARY:

This item presents the following Fiscal Year 2022-23 financial statements for all District Funds through June 30, 2023:

- Bank Balances – Including a summary of receipts and disbursements.

As a general summary of the financial statements:

- The finance department has begun the year-end closing process and upon completion, a summary of the final operating and capital expenditures for 22-23 will be provided.
- Bank balances are healthy and as expected. The transfer of funds to the new Five Star Bank operating account and money market account is nearly complete. All accounts have been reconciled.

FINANCIAL IMPACT:

None.

ATTACHMENTS:

- Bank Balances – Including a summary of receipts and disbursements

TWAIN HARTE COMMUNITY SERVICES DISTRICT
BANK BALANCES
As of June 30, 2023

Account	Beginning Balance	Receipts	Disbursements	Transfers	Current Balance
U.S. Bank Operating**	85,628	8,474	(68)		94,034
Five Star Bank-Operating**	712,018	362,625	(354,402)		720,241
U.S. Bank - D Grunsky #1*	35,106				35,106
U.S. Bank - D Grunsky #2*	41,183				41,183
LAIF	3,026,229				3,026,229
Five Star Money Market	1,023,648	2,504			1,026,152
TOTAL	\$ 4,923,812	\$ 373,603	\$ (354,470)	\$ -	\$ 4,942,945

*Davis Grunsky reserve money restricted for Davis Grunsky Loan Payments

** In process of changing operating bank accounts



Board Meeting Agenda Item Summary

July 12, 2023

ITEM #:	05B	ITEM TYPE:	<input type="checkbox"/> Discussion <input type="checkbox"/> Action <input checked="" type="checkbox"/> Both
SUBJECT:	Approval of the Minutes of the Regular Meeting Held on June 14, 2023		
RELATION TO STRATEGIC PLAN:	<input checked="" type="checkbox"/> N/A <input type="checkbox"/> Advances Goal/Objective #'s: _____		

RECOMMENDED ACTION:

Approve the minutes of the Regular Meeting held on June 14, 2023.

SUMMARY:

The California Government Code and District Policy #5060 (Minutes of Board Meetings) requires the District to keep a record of all its actions. As such, the District's Board Secretary prepared draft minutes for the Board's Regular Meeting held on June 14, 2023, in the format required by Policy #5060. The Board's responsibility is to review and approve the draft meeting minutes.

FINANCIAL IMPACT:

None.

ATTACHMENTS:

- Minutes of the Regular Meeting held on June 14, 2023

TWAIN HARTE COMMUNITY SERVICES DISTRICT
Board of Directors Regular Meeting
June 14, 2023

CALL TO ORDER: President Mannix called the meeting to order at 9:00 a.m. The following Directors, Staff, and Community Members were present:

DIRECTORS:

Director Mannix, President
Director Sipperley
Director Knudson
Director deGroot
Director Bohlman

STAFF:

Tom Trott, General Manager
Neil Gamez, Fire Chief
Lewis Giambruno, Operations Manager
Carolyn Higgins, Finance Officer

AUDIENCE: 14 Attendees

PUBLIC COMMENT ON NON-AGENDIZED ITEMS:

No public comment.

PRESENTATIONS:

- A. Badge Pinning of Captain Orozco.

CONSENT AGENDA:

- A. Presentation and approval of financial statements through May 31, 2023.
- B. Approval of the minutes of the Regular Meeting held on May 10, 2023.
- C. Discussion/action to Adopt Resolution #23-29 – Approve Continuance of the 1981 Special Tax for Fire Protection and Prevention.

MOTION: Director Sipperley made a motion to accept the consent agenda in its entirety.

SECOND: Director Bohlman

AYES: Mannix, Sipperley, Knudson, deGroot, Bohlman

NOES: None

ABSTAIN: None

PUBLIC HEARING:

- A. Open public hearing.
- B. Presentation on continuation of assessments for Fire and Rescue, Fire Protection and Emergency Services and Parks and Recreation Maintenance Districts.
- C. Receive public comment regarding continuation of assessments.
- D. Presentation of the proposed Fiscal Year 2023-24 budget, salary plan, capital outlay plans and reserve designations.
- E. Receive public comment regarding budget.
- F. Close public hearing.

- G. Discussion/action to adopt Resolution #23-20 – Approval of Engineer’s Report, Diagram and Assessment and Order to Continue Assessments for the Fire and Rescue Assessment District for Fiscal Year 2023-24.

MOTION: Director deGroot made a motion to adopt Resolution #23-20 – Approval of Engineer’s Report, Diagram and Assessment and Order to Continue Assessments for the Fire and Rescue Assessment District for Fiscal Year 2023-24.

SECOND: Director Sipperley

AYES: Mannix, Knudson, Sipperley, deGroot, Bohlman

NOES: None

ABSTAIN: None

- H. Discussion/action to adopt Resolution #23-21 – Approval of Engineer’s Report, Diagram and Assessment and Order to Continue Assessments for the Fire Protection and Emergency Response Services Assessment District for Fiscal Year 2023-24.

MOTION: Director Bohlman made a motion to adopt Resolution #23-21 – Approval of Engineer’s Report, Diagram and Assessment and Order to Continue Assessments for the Fire Protection and Emergency Response Services Assessment District for Fiscal Year 2023-24.

SECOND: Director Knudson

AYES: Mannix, Knudson, Sipperley, deGroot, Bohlman

NOES: None

ABSTAIN: None

- I. Discussion/action to adopt Resolution #23-22 – Approval of Engineer’s Report, Diagram and Assessment and Order to Continue Assessments for the Parks and Recreation Maintenance District for Fiscal Year 2023-24.

MOTION: Director Sipperley made a motion to adopt Resolution #23-22 – Approval of Engineer’s Report, Diagram and Assessment and Order to Continue Assessments for the Parks and Recreation Maintenance District for Fiscal Year 2023-24.

SECOND: Director DeGroot

AYES: Mannix, Sipperley, deGroot, Bohlman

NOES: None

ABSTAIN: Knudson

- J. Discussion/action to adopt Resolution #23-23 – Adoption of the Fiscal Year 2023-24 Budget, Salary Plan, Capital Outlay Plans and Reserve Designations.

MOTION: Director Sipperley made a motion to adopt Resolution #23-23 – Adoption of the Fiscal Year 2023-24 Budget, Salary Plan, Capital Outlay Plans and Reserve Designations.

SECOND: Director Bohlman

AYES: Mannix, Knudson, Sipperley, deGroot, Bohlman

NOES: None

ABSTAIN: None

NEW BUSINESS:

- A. Discussion/action regarding selection of an auditor for Fiscal Year 2022-23 through Fiscal Year 2025-26.

MOTION: Director deGroot made a motion to select auditor Blomberg and Griffin Accountancy Corporation for Fiscal Year 2022-23 through Fiscal Year 2025-26.

SECOND: Director Bohlman

AYES: Mannix, Knudson, Sipperley, deGroot, Bohlman

NOES: None

ABSTAIN: None

- B. Discussion/action to adopt the plans and specifications for the Twain Harte Meadows Park Project and authorize that it be advertised for formal bidding.

MOTION: Director Bohlman made a motion to adopt the plans and specifications for the Twain Harte Meadows Park Project and authorize that it be advertised for formal bidding.

SECOND: Director Sipperley

AYES: Mannix, Sipperley, deGroot, Bohlman

NOES: None

ABSTAIN: Knudson

- C. Discussion/action to adopt Resolution #23-24 – Awarding a Services Agreement to Advantage Technical Services, Inc. in the Amount of \$121,054 for Construction Management, Engineering and Inspection Services for the Million Gallon Tank #2 Rehabilitation Project.

MOTION: Director Sipperley made a motion to adopt Resolution #23-24 – Awarding a Services Agreement to Advantage Technical Services, Inc. in the Amount of \$121,054 for Construction Management, Engineering and Inspection Services for the Million Gallon Tank #2 Rehabilitation Project.

SECOND: Director Knudson

AYES: Mannix, Knudson, Sipperley, deGroot, Bohlman

NOES: None

ABSTAIN: None

- D. Discussion/action to adopt Resolution #23-25 – Approving a Fiscal Year 2022-23 Fire Fund Budget Adjustment in the amount of \$28,500 for Engine 722 Repairs.

MOTION: Director deGroot made a motion to adopt Resolution #23-25 – Approving a Fiscal Year 2022-23 Fire Fund Budget Adjustment in the amount of \$28,500 for Engine 722 Repairs.

SECOND: Director Sipperley

AYES: Mannix, Knudson, Sipperley, deGroot, Bohlman

NOES: None

ABSTAIN: None

- E. Discussion/action to adopt Resolution #23-26 – Adopting the Twain Harte Community Services District Water Shortage Contingency Plan.

MOTION: Director Sipperley made a motion to adopt Resolution #23-26 – Adopting the Twain Harte Community Services District Water Shortage Contingency Plan.

SECOND: Director Bohlman

AYES: Mannix, Knudson, Sipperley, deGroot, Bohlman

NOES: None

ABSTAIN: None

- F. Discussion/action to adopt revisions to Policy #2081 – Performance Evaluations.

MOTION: Director Bohlman made a motion to adopt revisions to Policy #2081 – Performance Evaluations.

SECOND: Director deGroot

AYES: Mannix, Knudson, Sipperley, deGroot, Bohlman

NOES: None

ABSTAIN: None

- G. Discussion/action to adopt revisions to Policy #2120 – District Cellular Phones.

MOTION: Director Knudson made a motion to adopt revisions to Policy #2120 – District Cellular Phones.

SECOND: Director Bohlman

AYES: Mannix, Knudson, Sipperley, deGroot, Bohlman

NOES: None

ABSTAIN: None

REPORTS:

President and Board Member Reports

- Director Bohlman reported on her attendance of Legislative Days and LAFCO meeting

-Director Sipperley reported on his attendance of the Tuolumne County CSD meeting.

-President Mannix reported on her attendance of the Tuolumne County CSD meeting.

Fire Chief Report by Chief Gamez

– A verbal summary of the written report was provided by Chief Gamez.

– A verbal summary of the CERT written report was provided by Carol Hallet.

Water/Sewer/Park Operations Report Provided by Operations Manager Giambruno

- A verbal summary of the written report was provided.

General Manager Report Provided by General Manager Trott

– A verbal summary of the written report was provided.

ADJOURNMENT:

The meeting was adjourned at 10:54 a.m.

Respectfully submitted,

APPROVED:

Kimberly Silva, Board Secretary

Eileen Mannix, President



Board Meeting Agenda Item Summary

July 12, 2023

ITEM #:	06A	ITEM TYPE:	<input type="checkbox"/> Discussion <input type="checkbox"/> Action <input checked="" type="checkbox"/> Both
SUBJECT:	Discussion/action regarding water and sewer demands for Accessory Dwelling Units (ADU).		
RELATION TO STRATEGIC PLAN:	<input checked="" type="checkbox"/> N/A <input type="checkbox"/> Advances Goal/Objective #'s: <u>5.14</u>		

RECOMMENDED ACTION:

Discuss regulations and capacity analysis for accessory dwelling units (ADU) and provide direction to staff for update of District Water and Sewer Ordinances.

SUMMARY:

In the last several years, California legislators have passed several laws to encourage the construction of ADU's as one of the solutions to the state's housing crisis. These laws remove many of the bureaucratic barriers that make the development process for a new structure costly and time-consuming. For example, the laws guarantee building permits, remove minimum lot sizes, minimize parking requirements and setbacks, and reduce and/or remove up-front impact and capacity fees for certain types of ADU's. The laws only ease requirements for the initial development process to encourage creation of ADU's; they do not provide any benefits or ease of regulations/fees for the ongoing utility services required for an ADU.

The District's current Water and Sewer Ordinances do not specifically address ADU's. Per the existing ordinances, ADU's are treated as "Multiple Dwelling Structures," which are defined as:

Any two or more dwelling units in any single building or structure or group of buildings or structures, including any apartment house or apartment court or rooming houses or condominium units.

The District's current Water and Sewer Ordinance has no size limits on "Multiple Dwelling Structures," but defines a "Dwelling Unit" as:

Any unit designed to house human beings which shall consist of one or more rooms and having one or more plumbing fixtures and used or capable of occupancy by a single person or any number of persons living together as a single family.

Although these definitions do not match the State's definition of an ADU, they are also not out of alignment with the State's definition:

An attached or detached residential dwelling unit that provides complete independent living facilities for one or more persons and is located on a lot with a proposed or existing primary residence. It shall include permanent provisions for living, sleeping, eating, cooking, and sanitation on the same parcel as the single-family or multi-family dwelling is or will be situated.

Since ADU's are treated as "Multiple Dwelling Structures" by the current District ordinances and are potentially capable of housing the same number of individuals as other "Dwelling Units," they are considered to have the same potential water and sewer capacity as other single family dwelling units. Therefore, new detached units have been charged the same up-front, one-time connection and impact charges as a single-family dwelling unit. They also receive an ongoing equivalent base water and sewer charge as a single-family dwelling unit.

State law only addresses regulations to encourage the initial development of an ADU and not ongoing services. The District's ongoing water and sewer charges for ADU's are based on the California Constitution provisions

for “property related fees,” which require that ongoing service charges be proportional to the service provided to each property. As such, the District’s ongoing water and sewer charges for ADU’s comply with current law. However, the Board may want to re-classify ADU’s and other multi-residential units based on the recent analysis of ADU and multi-residential water and sewer capacity – see attached ADU Capacity Analysis.

In order to comply with ADU law and Tuolumne County’s ordinance relating to ADU’s (Ordinance Section 17.52.200), the District needs to evaluate and revise its existing water and sewer ordinance as it relates to up-front development requirements and connection and impact charges for ADU’s. Some recent law and County ordinance requirements that need to be taken into consideration are as follows:

- ADU’s shall not be considered as new construction for the purposes of calculating connection fees or capacity charges for water and sewer services.
- Impact fees cannot be charged for ADU’s less than 750 SF.
- Impact fees for ADU’s greater than 750 SF must be charged proportionally in relation to square footage.
- Connection fees shall not be collected for Junior ADU’s (an ADU less than 500 SF located withing an existing primary residence).
- New water and sewer connections cannot be required for ADU’s constructed within an existing primary residence.

As the District updates its water and sewer ordinances, staff recommends that the Board discuss, at a minimum, the following ADU-related questions and provide direction for potential revision of the ordinances:

1. Is the current definition of “Multiple Dwelling Structures” and “Dwelling Unit” sufficient?
2. Does a separate definition for ADU need to be added?
3. Should size be incorporated into the definition for ADU or Dwelling Unit?
4. Should the proportional charge for ADU’s and/or multi-family dwelling units be revised based on proportional capacity for multi-family residential units?
5. How should the District revise its connection and capacity fees in relation to ADU’s?
6. How should the District approach the potential of unknown, existing ADU’s within the District?

The District currently has 42 accounts on record with “Multiple Dwelling Structures,” 30 of which could be classified as either a single-family dwelling unit with an ADU or a duplex.

FINANCIAL IMPACT:

An update of the definition of dwelling unit and/or capacity determination in the District’s Water and Sewer Ordinances may impact the proportional share of customer costs and future water and sewer rate revenue.

ATTACHMENTS:

- ADU Regulations Summary
- ADU Capacity Analysis
- California 2022 ADU Handbook
- Tuolumne County ADU Ordinance

ACCESSORY DWELLING UNIT (ADU) REGULATIONS SUMMARY

CURRENT THCSO ORDINANCE

THCSO's current ordinance does not specifically address ADU's. It does, however, define a single family dwelling and multiple dwelling structure:

43. Single Family Dwelling - Any unit designed to house human beings which shall consist of one or more rooms and having one or more plumbing fixtures and used or capable of occupancy by a single person or any number of persons living together as a single family.

20. Multiple Dwelling Structure - Any two or more dwelling units in any single building or structure or group of buildings or structures, including any apartment house or apartment court or rooming houses or condominium units.

Based on these definitions, an ADU inside a single building would be classified as a "Multiple Dwelling Structure" and an ADU that is separate from the main building would be classified as two "Single Family Dwellings".

CALIFORNIA REGULATIONS

Reference: 2022 CA Accessory Dwelling Unit (ADU) Handbook

<https://www.hcd.ca.gov/sites/default/files/2022-07/ADUHandbookUpdate.pdf>

Definition:

An ADU is accessory to a primary residence (on the same lot as the residence) and has complete independent living facilities for one or more persons. It shall include permanent provisions for living, sleeping, eating, cooking, and sanitation. ADU's have a few variations:

- Detached: The unit is separated from the primary structure.
- Attached: The unit is attached to the primary structure.
- Converted Existing Space: Space (e.g., master bedroom, attached garage, storage area, or similar use, or an accessory structure) on the lot of the primary residence that is converted into an independent living unit.
- Junior ADU: A specific type of conversion of existing space (less than 500 SF) that is contained entirely within an existing or proposed single-family residence and may share sanitation facilities with primary residence.

Recent Law:

Recent laws encourage the construction of ADU's to assist in solving California's housing crisis by reducing up-front restrictive costs and regulations to build an ADU. These generally include:

- Ministerial building permit approval withing a residential or mixed-use zone.
- No requirement on minimum lots size; HOWEVER, local agencies may restrict building if the water and sewer services are not adequate to serve the ADU.
- Minimizes requirements for extra parking and setbacks.

- No impact fees for ADU's less than 750 SF. Impact fees may be charged for larger units, but only based on proportional impact, usually based on square footage.
- ADU's shall not be considered as new construction in relation to connection fees or capacity charges for water and sewer, unless they are built concurrently with a new single family home.
- Cannot require new water/sewer connections if ADU is within existing home space and has its own exterior access.

TUOLUMNE COUNTY REGULATIONS

Reference: Tuolumne County Ordinance Section 17.52.200

<https://www.tuolumnecounty.ca.gov/DocumentCenter/View/454/Chapter-1752---General-Provisions-and-Exceptions?bidId=>

Of particular note, in Section 17.52.200.E.7.a,b:

- All ADU's are subject to sewer connection fees and ongoing sewer charges.
- Separate metering of utilities is not required for ADU's, unless they are constructed at the same time as the primary residence.
- No one-time impact fees can be charged for ADU's less than 750 SF. For reference, impact fees usually include capacity fees, one-time fees that help fund existing or new public facilities that are of proportional benefit to the property being charged. Impact fees usually do not include one-time connection fees, which pay for the physical facilities needed to make a water or sewer connection (i.e. meters, service lines, labor, materials, etc.).
- Impact fees on ADU's greater than 750 SF must be charged proportionally in relation to the square footage.
- Connection fees (water and sewer) shall not be collected for a Junior ADU. A Junior ADU is an accessory dwelling unit that is less than 500 SF and is built within an existing primary residence.

MULTI-RESIDENTIAL (MULTI-UNIT) WATER USE ANALYSIS

AVERAGE MONTHLY CONSUMPTION - PER UNIT

	Consumption (gal/mo)	% of SFR
<u>SINGLE FAMILY RESIDENTIAL (SFR)</u>		
All - Single Family Home (1-unit)	3,596	100%
<u>ALL MULTI-RESIDENTIAL</u>		
Full-Time Only	3,247	90%
<u>MULTI-RESIDENTIAL BY UNIT TYPE</u>		
Duplexes/Triplexes (Full-Time)	3,088	86%
Apartments (Full-Time)	3,222	90%
Homes w/ADU (Full-Time)	3,784	105%

CONSUMPTION NOTES

*Outliers have been removed - see notes below.

** Consumption based on a 3-year average

NOTES ABOUT OUTLIERS

Remove outliers to best determine use by an average occupied household:

* Remove units with an average use less than 1,130 gallons/month to account for unoccupied homes:

1,130 gallons is based on 80% of 47 gallons/person/day (SWRCB "normal" indoor use) for 1 person

It is normal to see customers conserve this much, especially during drought.

* Remove units with an average use more than 14,100 gallons/month to account for major household leaks

14,100 gallons is based on 47 gallons/person/day (SWRCB "normal" indoor use) for a household of 10 people

* Remove multi-residential units from full-time status that have a clear pattern of part-time use. For example, several months each year may be near 0 gallons or overall month-to-month use is sporadic and often below 1,130 gallons. However, units that have sporadic, but mostly full use are included.

MULTI-RESIDENTIAL (MULTI-UNIT) SEWER USE ANALYSIS

AVERAGE MONTHLY CONSUMPTION - PER UNIT

	Consumption (gal/mo)	% of SFR
<u>SINGLE FAMILY RESIDENTIAL (SFR)</u>		
Winter- Single Family Home (1-unit)	3,307	100%
<u>ALL MULTI-RESIDENTIAL</u>		
Full-Time Only	3,010	91%
<u>MULTI-RESIDENTIAL BY UNIT TYPE</u>		
Duplexes/Triplexes (Full-Time)	2,785	84%
Apartments (Full-Time)	2,990	90%
Homes w/ADU (Full-Time)	3,417	103%

CONSUMPTION NOTES

*Outliers have been removed - see notes below.

** Consumption based on a 3-year average

NOTES ABOUT OUTLIERS

Remove outliers to best determine use by an average occupied household:

* Remove units with an average use less than 1,130 gallons/month to account for unoccupied homes:

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* Remove multi-residential units from full-time status that have a clear pattern of part-time use. For example, several months each year may be near 0 gallons or overall month-to-month use is sporadic and often below 1,130 gallons. However, units that have sporadic, but mostly full use are included.



CALIFORNIA DEPARTMENT OF HOUSING AND COMMUNITY
DEVELOPMENT

ACCESSORY DWELLING UNIT HANDBOOK

UPDATED JULY 2022



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Understanding Accessory Dwelling Units (ADUs) and Their Importance



California's housing production is not keeping pace with demand. In the last decade, fewer than half of the homes needed to keep up with the population growth were built. Additionally, new homes are often constructed away from job-rich areas. This lack of housing that meets people's needs is impacting affordability and causing average housing costs, particularly for renters in California, to rise significantly. As affordable housing becomes less accessible, people drive longer distances between housing they can afford and their workplace or pack themselves into smaller shared spaces, both of which reduce quality of life and produce negative environmental impacts.

Beyond traditional construction, widening the range of housing types can increase the housing supply and help more low-income Californians thrive. Examples of some of these housing types are accessory dwelling units (ADUs – also referred to as second units, in-law units, casitas, or granny flats) and junior accessory dwelling units (JADUs).

What is an ADU?

An ADU is accessory to a primary residence and has complete independent living facilities for one or more persons and has a few variations:

- Detached: The unit is separated from the primary structure.
- Attached: The unit is attached to the primary structure.
- Converted Existing Space: Space (e.g., master bedroom, attached garage, storage area, or similar use, or an accessory structure) on the lot of the primary residence that is converted into an independent living unit.
- JADU: A specific type of conversion of existing space that is contained entirely within an existing or proposed single-family residence.

ADUs tend to be significantly less expensive to build than new detached single-family homes and offer benefits that address common development barriers, such as environmental quality. Because ADUs must be built on lots with existing or proposed housing, they do not require paying for new land or other costly infrastructure often required to build a new single-family home. Because they are contained inside existing or proposed single-family homes, JADUs require relatively modest renovations and are much more affordable to complete. ADUs are often built with cost-effective one- or two-story wood frames, which are also less expensive than other construction types. Additionally, prefabricated ADUs (e.g., manufactured housing and factory-built housing) can be directly purchased and can further reduce construction time and cost. ADUs can provide as much living space as apartments and condominiums and work well for couples, small families, friends, young people, and seniors.

Much of California's housing crisis comes from job-rich, high-opportunity areas where the total housing stock is insufficient to meet demand and exclusionary practices have limited housing choice and inclusion. Professionals and students often prefer living closer to jobs and amenities rather than spending hours commuting. Parents often want better access to schools and do not necessarily require single-family homes to meet their housing needs. There is a shortage of affordable units, and the units that are available can be out of reach for many people. Homeowners can construct an ADU on their lot or convert an underutilized part of their home into a JADU. This flexibility benefits both renters and homeowners, who can receive extra monthly rental income while also contributing to meeting state housing production goals.

ADUs also give homeowners the flexibility to share independent living areas with family members and others, allowing seniors to age in place, even if they require more care, thus helping extended families stay together while maintaining privacy. ADUs provide housing for family members, students, the elderly, in-home health care providers, individuals with disabilities, and others at below market prices within existing neighborhoods.

New policies are making ADUs even more affordable to build, in part by limiting the development impact fees that local jurisdictions may charge for ADU construction and relaxing local zoning requirements. ADUs and JADUs can often be built at a fraction of the price of a new single-family home, and homeowners may use their existing lot to create additional housing. Often the rent generated from the ADU can pay for the entire project in a matter of years.

ADUs and JADUs are a flexible form of housing that can help Californians more easily access job-rich, high-opportunity areas. By design, ADUs are more affordable to renters and can provide additional income to homeowners. Local governments can encourage the development of ADUs and improve access to jobs, education, and services for many Californians.

Summary of Recent Changes to ADU Laws



In Government Code Section 65852.150, the California Legislature found and declared that, among other things, allowing ADUs in zones that allow single-family and multifamily uses provides additional rental housing and is an essential component in addressing California's housing needs. Over the years, State ADU Law has been revised to improve its effectiveness at creating more housing units. Changes to State ADU Law effective January 1, 2021, further reduce barriers, streamline approval processes, and expand capacity to accommodate the development of ADUs and JADUs. Within this context, the California Department of Housing and Community Development (HCD) developed –

and continues to update – this handbook to assist local governments, homeowners, architects, and the general public in encouraging the development of ADUs. Below is a summary of recent legislation that amended State ADU Law. Please see Attachment 1 for the complete statutory changes.

AB 345 (Chapter 343, Statutes of 2021)

AB 345 (Chapter 343, Statutes of 2021) builds upon recent changes to State ADU Law, particularly Government Code sections 65852.2 and 65852.26, to require the allowance of the separate conveyance of ADUs from the primary dwelling in certain circumstances, provided they meet certain conditions, including those listed below, found in Government Code section 65852.26, subdivisions (a)(1-5):

- The ADU or primary dwelling was built or developed by a qualified nonprofit. (Gov. Code, § 65852.26, subd. (a).)
- There is an enforceable restriction on the use of the property between the low-income buyer and nonprofit that satisfies the requirements of Section 402.1 of the Revenue and Taxation Code. (Gov. Code, § 65852.26, subd. (a)(2).)
- The entire property is subject to the affordability restrictions to assure that the ADU and primary dwelling are preserved for owner-occupied, low-income housing for 45 years and are sold or resold only to a qualified buyer. (Gov. Code, § 65852.26, subd. (a)(3)(D).)
- The property is held in a recorded tenancy in common agreement that meets certain requirements. (Gov. Code, § 65852.26, subd. (a)(3).)

AB 345 does not apply to JADUs, and local ordinances must continue to prohibit JADUs from being sold separately from the primary residence.

AB 3182 (Chapter 198, Statutes of 2020)

AB 3182 (Chapter 198, Statutes of 2020) builds upon recent changes to State ADU Law, specifically Government Code section 65852.2 and Civil Code Sections 4740 and 4741, to further address barriers to the development and use of ADUs and JADUs.

This legislation, among other changes, addresses the following:

- States that an application for the creation of an ADU or JADU shall be *deemed approved* (not just subject to ministerial approval) if the local agency has not acted on the completed application within 60 days. (Gov. Code, § 65852.2, subd. (a)(3).)
- Requires ministerial approval of an application for a building permit within a residential or mixed-use zone to create one ADU *and* one JADU per lot (not one or the other), within the proposed or existing single-family dwelling, if certain conditions are met. (Gov. Code, § 65852.2, subd. (e)(1)(A).)
- Provides for the rental or leasing of a separate interest ADU or JADU in a common interest development, notwithstanding governing documents that otherwise appear to prohibit renting or leasing of a unit, and without regard to the date of the governing documents. (Civ. Code, § 4740, subd. (a), and Civ. Code, § 4741, subd. (a).)
- Provides that not less than 25 percent of the separate interest units within a common interest development be allowed as rental or leasable units. (Civ. Code, § 4740, subd. (b).)

AB 68 (Chapter 655, Statutes of 2019), AB 881 (Chapter 659, Statutes of 2019), and SB 13 (Chapter 653, Statutes of 2019)

AB 68 (Chapter 655, Statutes of 2019), AB 881 (Chapter 659, Statutes of 2019), and SB 13 (Chapter 653, Statutes of 2019) build upon recent changes to ADU and JADU Law, specifically Government Code sections 65852.2 and 65852.22, and further address barriers to the development of ADUs and JADUs.

This legislation, among other changes, addresses the following:

- Prohibits local agencies from including in development standards for ADUs requirements on minimum lotsize. (Gov. Code, § 65852.2, subd. (a)(1)(B)(i).)
- Clarifies that areas designated by local agencies for ADUs may be based on the adequacy of water and sewer services, as well as on impacts on traffic flow and public safety. (Gov. Code, § 65852.2, subd. (a)(1)(A).)
- Eliminates all owner-occupancy requirements by local agencies for ADUs approved between January 1, 2020, and January 1, 2025. (Gov. Code, § 65852.2, subd. (a)(6).)
- Prohibits a local agency from establishing a maximum size of an ADU of less than 850 square feet, or 1,000 square feet if the ADU contains more than one bedroom and

requires approval of a permit to build an ADU of up to 800 square feet. (Gov. Code, § 65852.2, subds. (c)(2)(B) and (C).)

- Clarifies that when ADUs are created through the conversion of a garage, carport or covered parking structure, replacement of off-street parking spaces cannot be required by the local agency. (Gov. Code, § 65852.2, subd. (a)(1)(D)(xi).)
- Reduces the maximum ADU and JADU application review time from 120 days to 60 days. (Gov. Code, § 65852.2, subd. (a)(3) and (b).)
- Clarifies that “public transit” includes various means of transportation that charge set fees, run on fixed routes, and are available to the public. (Gov. Code, § 65852.2, subd. (j)(9).)
- Establishes impact fee exemptions and limitations based on the size of the ADU. ADUs up to 750 square feet are exempt from impact fees, and ADUs that are 750 square feet or larger may be charged impact fees but only such fees that are proportional in size (by square foot) to those for the primary dwelling unit. (Gov. Code, § 65852.2, subd. (f)(3).)
- Defines an “accessory structure” to mean a structure that is accessory and incidental to a dwelling on the same lot. (Gov. Code, § 65852.2, subd. (j)(2).)
- Authorizes HCD to notify the local agency if HCD finds that the local ADU ordinance is not in compliance with state law. (Gov. Code, § 65852.2, subd. (h)(2).)
- Clarifies that a local agency may identify an ADU or JADU as an adequate site to satisfy its Regional Housing Needs Allocation (RHNA). (Gov. Code, §§ 65583.1, subd. (a), and 65852.2, subd. (m).)
- Permits JADUs even where a local agency has not adopted an ordinance expressly authorizing them. (Gov. Code, § 65852.2, subds. (b) and (e).)
- Allows a permitted JADU to be constructed within the walls of the proposed or existing single-family residence and eliminates the required inclusion of an existing bedroom and an interior entry into the single-family residence. (Gov. Code, § 65852.22, subd. (a)(4-5).)
- Requires, upon application and approval, a local agency to delay enforcement against a qualifying substandard ADU for five years to allow the owner to correct the violation, so long as the violation is not a health and safety issue, as determined by the enforcement agency. (Gov. Code, § 65852.2, subd. (n); Health & Safety Code, § 17980.12).)

[AB 587](#) (Chapter 657, Statutes of 2019), [AB 670](#) (Chapter 178, Statutes of 2019), and [AB 671](#) (Chapter 658, Statutes of 2019)

In addition to the legislation listed above, AB 587 (Chapter 657, Statutes of 2019), AB 670 (Chapter 178, Statutes of 2019), and AB 671 (Chapter 658, Statutes of 2019) also have an

impact on State ADU Law, particularly through Health and Safety Code Section 17980.12. These pieces of legislation, among other changes, address the following:

- AB 587 creates a narrow exemption to the prohibition for ADUs to be sold or otherwise conveyed separately from the primary dwelling by allowing deed-restricted sales to occur if the local agency adopts an ordinance. To qualify, the primary dwelling and the ADU are to be built by a qualified nonprofit corporation whose mission is to provide units to low-income households. (Gov. Code, § 65852.26.)
- AB 670 provides that covenants, conditions and restrictions that either effectively prohibit or unreasonably restrict the construction or use of an ADU or JADU on a lot zoned for single-family residential use are void and unenforceable. (Civ. Code, § 4751.)
- AB 671 requires local agencies' housing elements to include a plan that incentivizes and promotes the creation of ADUs that can offer affordable rents for very low-, low-, or moderate-income households and requires HCD to develop a list of state grants and financial incentives in connection with the planning, construction, and operation of affordable ADUs. (Gov. Code, § 65583; Health & Safety Code, § 50504.5.)

Frequently Asked Questions

1. Legislative Intent

- **Should a local ordinance encourage the development of ADUs?**

Yes. Pursuant to Government Code section 65852.150, the California Legislature found and declared that, among other things, California is facing a severe housing crisis and ADUs are a valuable form of housing that meets the needs of family members, students, the elderly, in-home health care providers, people with disabilities, and others. Therefore, ADUs are an essential component of California's housing supply.

State ADU Law and recent changes intend to address barriers, streamline approval, and expand potential capacity for ADUs, recognizing their unique importance in addressing California's housing needs. The preparation, adoption, amendment, and implementation of local ADU ordinances must be carried out consistent with Government Code section 65852.150 and must not unduly constrain the creation of ADUs. Local governments adopting ADU ordinances should carefully weigh the adoption of zoning, development standards, and other provisions for impacts on the development of ADUs.

ADU Law is the statutory minimum requirement. Local governments may elect to go beyond this statutory minimum and further the creation of ADUs. (Gov. Code, § 65852.2, subd. (g).) Many local governments have embraced the importance of ADUs as an important part of their overall housing policies and have pursued innovative strategies.

Government Code section 65852.150:

(a) The Legislature finds and declares all of the following:

(1) Accessory dwelling units are a valuable form of housing in California.

(2) Accessory dwelling units provide housing for family members, students, the elderly, in-home health care providers, the disabled, and others, at below market prices within existing neighborhoods.

(3) Homeowners who create accessory dwelling units benefit from added income, and an increased sense of security.

(4) Allowing accessory dwelling units in single-family or multifamily residential zones provides additional rental housing stock in California.

(5) California faces a severe housing crisis.

(6) The state is falling far short of meeting current and future housing demand with serious consequences for the state's economy, our ability to build green infill consistent with state greenhouse gas reduction goals, and the well-being of our citizens, particularly lower and middle-income earners.

(7) Accessory dwelling units offer lower cost housing to meet the needs of existing and future residents within existing neighborhoods, while respecting architectural character.

(8) Accessory dwelling units are, therefore, an essential component of California's housing supply.

(b) It is the intent of the Legislature that an accessory dwelling unit ordinance adopted by a local agency has the effect of providing for the creation of accessory dwelling units and that provisions in this ordinance relating to matters including unit size, parking, fees, and other requirements, are not so arbitrary, excessive, or burdensome so as to unreasonably restrict the ability of homeowners to create accessory dwelling units in zones in which they are authorized by local ordinance.

2. Zoning, Development and Other Standards

A) Zoning and Development Standards

- **Are ADUs required jurisdiction-wide?**

No. ADUs proposed pursuant to subdivision (e) of Government Code section 65852.2 must be permitted in any residential or mixed-use zone, which should be construed broadly to mean any zone where residential uses are permitted by-right or by conditional use. For other ADUs, local governments may, by ordinance, designate areas in zones where residential uses are permitted that will also permit ADUs. However, any limits on where ADUs are permitted may only be based on the adequacy of water and sewer service and on the impacts on traffic flow and public safety.

Further, local governments may not preclude the creation of ADUs altogether, and any limitation should be accompanied by detailed findings of fact explaining why ADU limitations are required and consistent with these factors. If a lot with a residence has been rezoned to a use that does not allow for residential uses, that lot is no longer eligible to create an ADU. (Gov. Code § 65852.2 subd. (a)(1) and (e)(1).)

Impacts on traffic flow should consider factors like lower car ownership rates for ADUs. Finally, local governments may develop alternative procedures, standards, or special conditions with mitigations for allowing ADUs in areas with potential health and safety concerns.

- **Can ADUs exceed general plan and zoning densities?**

Yes. An ADU is an accessory use for the purposes of calculating allowable density under the general plan and zoning and does not count toward the allowable density. For example, if a zoning district allows one unit per 7,500 square feet, then an ADU would not be counted as an additional unit. Further, local governments could elect to allow more than one ADU on a lot, and ADUs are automatically a residential use deemed consistent with the general plan and zoning. (Gov. Code, § 65852.2, subd. (a)(1)(C).)

- **Can a local government apply design and development standards?**

Yes. With an adopted ADU ordinance in compliance with State ADU Law, a local government may apply development and design standards that include, but are not limited to, parking, height, setback, landscape, architectural review, maximum size of a unit, and standards that prevent adverse impacts on any real property that is listed in the California Register of Historical Resources. **However, these standards should be objective to allow ministerial review of an ADU.** (Gov. Code, § 65852.2, subds. (a)(1)(B)(i) and (a)(4).)

ADUs created under subdivision (e) of Government Code section 65852.2 shall not be subject to design and development standards except for those that are noted in the subdivision.

ADUs that do not meet objective and ministerial development and design standards may still be permitted through an ancillary discretionary process if the applicant chooses to pursue this route. In this scenario, the applicant assumes time and monetary costs associated with a discretionary approval process. Some jurisdictions with compliant ADU ordinances apply additional processes to further the creation of ADUs that do not otherwise comply with the minimum standards necessary for ministerial review. Importantly, these processes are intended to provide additional opportunities to create ADUs that would not otherwise be permitted, and a discretionary process may not be used to review ADUs that are fully compliant with State ADU Law.

- **Are ADUs permitted ministerially?**

Yes. ADUs subject to State ADU Law must be considered, approved, and permitted ministerially, without discretionary action. Development and other decision-making standards must be sufficiently objective to allow for ministerial review. Examples include numeric and fixed standards such as heights or setbacks, or design standards such as colors or materials. Subjective standards require judgement and can be interpreted in multiple ways, such as privacy, compatibility with neighboring properties, or promoting harmony and balance in the community; subjective standards must not be imposed on ADU development. Further, ADUs must not be subject to hearing requirements or any ordinance regulating the issuance of variances or special use permits and must be considered ministerially. (Gov. Code § 65852.2, subs. (a)(3) and (a)(4).)

- **Is there a streamlined permitting process for ADU and JADU applications?**

Yes. Whether or not a local agency has adopted an ordinance, applications to create an ADU or JADU shall be considered and approved ministerially within 60 days from the date the local agency receives a completed application. Although the allowed 60-day review period may be interrupted due to an applicant addressing comments generated by a local agency during the permitting process, additional 60-day time periods may not be required by the local agency for minor revisions to the application. (Gov. Code § 65852.2, subs. (a)(3) and (b).)

- **Can I create an ADU if I have multiple detached dwellings on a lot?**

Yes. A lot where there are currently multiple detached single-family dwellings is eligible for creation of one ADU per lot by converting space within the proposed or existing space of a single-family dwelling or existing structure and by building a new detached ADU subject to certain development standards. (Gov. Code § 65852.2, subs. (e)(1)(A) and (B).)

- **What is considered a multifamily dwelling under ADU Law?**

For the purposes of State ADU Law, a structure with two or more attached dwellings on

a single lot is considered a multifamily dwelling structure. Multiple detached single-unit dwellings on the same lot are not considered multifamily dwellings for the purposes of State ADU Law.

- **Can I build an ADU in a historic district or if the primary residence is subject to historic preservation?**

Yes. ADUs are allowed within a historic district and on lots where the primary residence is subject to historic preservation. State ADU Law allows for a local agency to impose standards that prevent adverse impacts on any real property that is listed in the California Register of Historical Resources. However, these standards do not apply to ADUs proposed pursuant to Government Code section 65852.2, subdivision (e).

As with non-historic resources, a jurisdiction may impose objective and ministerial standards that are sufficiently objective to be reviewed ministerially and do not unduly burden the creation of ADUs. Jurisdictions are encouraged to incorporate these standards into their ordinances and to submit these standards along with their ordinances to HCD. (Gov. Code, § 65852.2, subds. (a)(1)(B)(i) and (a)(5).)

B) Size Requirements

- **Can minimum lot size requirements be imposed on ADUs? What about lot coverage, floor area ratio, or open space requirements?**

No. While local governments may impose certain development standards on ADUs, these standards shall not include minimum lot size requirements. Further, lot coverage requirements cannot preclude the creation of a statewide exemption ADU (see below). If lot coverage requirements do not allow such an ADU, an automatic exception or waiver should be given to appropriate development standards such as lot coverage, floor area, or open space requirements. Local governments may continue to enforce building and health and safety standards and may consider design, landscape, and other standards to facilitate compatibility. (Gov. Code, § 65852.2, subds. (c)(2)(C).)

What is a statewide exemption ADU?

A statewide exemption ADU, found in Government Code section 65852, subdivision (e), is an ADU of up to 800 square feet, 16 feet in height, as potentially limited by a local agency, and with four-foot side and rear yard setbacks. State ADU Law requires that no lot coverage, floor area ratio, open space, or minimum lot size will preclude the construction of a statewide exemption ADU. Further, State ADU Law allows the construction of a detached new construction statewide exemption ADU to be combined on the same lot with a JADU in a single-family residential zone. In addition, ADUs are allowed in any residential or mixed uses regardless of zoning and development standards imposed in an ordinance. See more discussion below.

- **Can minimum and maximum unit sizes be established for ADUs?**

Yes. A local government may, by ordinance, establish minimum and maximum unit size requirements for both attached and detached ADUs; however, maximum unit size requirements must allow an ADU of at least 850 square feet, or 1,000 square feet for ADUs with more than one bedroom. For local agencies without an ADU ordinance, maximum unit sizes are 1,200 square feet for a new detached ADU and up to 50 percent of the floor area of the existing primary dwelling for an attached ADU (at least 800 square feet). Finally, the local agency must not establish by ordinance a minimum square footage requirement that prohibits the development of an efficiency unit as defined in Health and Safety Code section 17958.1.

The conversion of an existing accessory structure or a portion of the existing primary residence to an ADU is not subject to unit size requirements. For example, an existing 3,000 square-foot barn converted to an ADU would not be subject to the local unit size requirements, regardless of whether a local government has an adopted ADU ordinance. Should an applicant want to expand an accessory structure to create an ADU beyond 150 square feet, this ADU would be subject to the size maximums outlined in State ADU Law or in the local agency's adopted ordinance.

- **Can a percentage of the primary dwelling be used to limit the maximum size of an ADU?**

Yes. Local agencies may utilize a percentage (e.g., 50 percent) of the primary dwelling as a maximum unit size for attached ADUs, but only if it does not restrict an ADU's size to less than the standard of at least 850 square feet (or at least 1,000 square feet for ADUs with more than one bedroom). Local agencies shall not, by ordinance, establish any other minimum or maximum unit sizes, including limits based on a percentage of the area of the primary dwelling, that precludes an 800 square-foot ADU. (Gov. Code, § 65852.2, subd. (c)(2)(C).) Local agencies utilizing percentages of the primary dwelling as maximum unit sizes can consider multi-pronged standards to help navigate these requirements (e.g., shall not exceed 50 percent of the dwelling or 1,000 square feet, whichever is greater).

- **Can maximum unit sizes exceed 1,200 square feet for ADUs?**

Yes. Maximum unit sizes can exceed 1,200 square feet for ADUs through the adoption of a local ADU ordinance. State ADU Law does not limit the authority of local agencies to adopt less restrictive requirements for the creation of ADUs. (Gov. Code, § 65852.2, subd. (g).)

C) Parking Requirements

- **Are certain ADUs exempt from parking requirements?**

Yes. A local agency shall not impose ADU parking standards for any of the following ADUs, pursuant to Government Code section 65852.2, subdivisions (d)(1-5) and (j)(10):

- (1) ADUs located within one-half mile walking distance of public transit.
- (2) ADUs located within an architecturally and historically significant historic district.
- (3) ADUs that are part of the proposed or existing primary residence or an accessory structure.
- (4) When on-street parking permits are required but not offered to the occupant of the ADU.
- (5) When there is a car share vehicle located within one block of the ADU.

Note: For the purposes of State ADU Law, a jurisdiction may use the designated areas where a car share vehicle may be accessed. Public transit is any location where an individual may access buses, trains, subways, and other forms of transportation that charge set fares, run on fixed routes, and are available to the general public. Walking distance is defined as the pedestrian shed to reach public transit. Additional parking requirements to avoid impacts to public access may be required in the Coastal Zone.

- **Can ADU parking requirements exceed one space per unit or bedroom?**

No. Parking requirements for ADUs shall not exceed one parking space per unit or bedroom, whichever is less. These spaces may be provided as tandem parking on a driveway. Guest parking spaces shall not be required for ADUs under any circumstances. For certain ADUs, pursuant to Government Code section 65852.2, subdivisions (d)(1-5) and (j)(10), a local agency may not impose any ADU parking standards (see above question).

What is Tandem Parking?

Tandem parking means two or more automobiles that are parked on a driveway or in any other location on a lot, lined up behind one another. (Gov. Code, § 65852.2, subs. (a)(1)(D)(x)(l) and (j)(11).)

Local agencies may choose to eliminate or reduce parking requirements for ADUs, such as requiring zero or half a parking space per each ADU, to remove barriers to ADU construction and to facilitate development.

- **Is flexibility for siting ADU parking recommended?**

Yes. Local agencies should be flexible when siting parking for ADUs. Off-street parking spaces for the ADU shall be permitted in setback areas in locations determined by the local agency or through tandem parking unless specific findings are made. Specific findings must be based on specific site or regional topographical or fire and life safety conditions.

When a garage, carport, or covered parking structure is demolished in conjunction with the construction of an ADU, or converted to an ADU, the local agency shall not require that those off-street parking spaces for the primary unit be replaced. (Gov. Code, § 65852.2, subd. (a)(1)(D)(xi).)

D) Setbacks

- **Can setbacks be required for ADUs?**

Yes. A local agency may impose development standards, such as setbacks, for the creation of ADUs. However, setbacks should not unduly constrain the creation of ADUs and cannot be required for ADUs proposed pursuant to subdivision (e). Further, a setback of no more than four feet from the side and rear lot lines shall be required for an attached or detached ADU. (Gov. Code, § 65852.2, subd. (a)(1)(D)(vii).) Additional setback requirements may be required in the Coastal Zone if required by a local Coastal Program. Setback requirements must also comply with any recorded utility easements or other previously recorded setback restrictions.

No setback shall be required for an ADU created within an existing living area or accessory structure or an ADU created in a new structure in the same location as an existing structure, while not exceeding the existing dimensions, including height. (Gov. Code, § 65852.2, subd. (a)(1)(D)(vii).)

A local agency may also allow the expansion of a detached structure being converted into an ADU when the existing structure does not have four-foot rear and side setbacks. A local agency may also allow the expansion area of a detached structure being converted into an ADU to have no setbacks, or setbacks of less than four feet, if the existing structure has no setbacks, or has setbacks of less than four feet, respectively. A local agency shall not require setbacks of more than four feet for the expanded area of a detached structure being converted into an ADU.

A local agency may still apply front yard setbacks for ADUs, but front yard setbacks cannot preclude an ADU of at least 800 square feet and must not unduly constrain the creation of all types of ADUs. (Gov. Code, §65852.2, subd. (c) and (e).)

- **Is there a distance requirement between an ADU and other structures on the lot?**

State ADU Law does not address the distance between an ADU and other structures on a lot. A local agency may impose development standards for the creation of ADUs, and ADUs shall comply with local building codes. However, development standards should not unduly constrain the creation of ADUs, cannot preclude a statewide exemption ADU (an ADU of up to 800 square feet, 16 feet in height, as potentially limited by a local agency, and with four-foot side and rear yard setbacks), and should not unduly constrain the creation of all types of ADUs, where feasible. (Gov. Code, § 65852.2, subd. (c).)

E) Height Requirements

- **Is there a limit on the height or number of stories of an ADU?**

There is no height limit contained in State ADU Law, but local agencies may impose height limits provided that the limit is no less than 16 feet. (Gov. Code, § 65852.2, subd. (a)(1)(B)(i).) For a local agency to impose a height limit, it must do so through the adoption of a compliant ADU ordinance.

F) Bedrooms

- **Can a limit on the number of bedrooms in an ADU be imposed?**

A limit on the number of bedrooms could be construed as a discriminatory practice towards protected classes, such as familial status, and would be considered a constraint on the development of ADUs. Building code standards for minimum bedroom size still apply.

G) Impact Fees

- **Can impact fees be charged for an ADU less than 750 square feet?**

No. An ADU is exempt from incurring impact fees from local agencies, special districts, and water corporations if less than 750 square feet. If an ADU is 750 square feet or larger, impact fees shall be charged proportionately in relation to the square footage of the ADU to the square footage of the primary dwelling unit.

What is “Proportionately”?

“Proportionately” is some amount in relation to a total amount, in this case, an impact fee for a single-family dwelling. For example, a 2,000 square-foot primary dwelling with a proposed 1,000 square-foot ADU could result in 50 percent of the impact fee that would be charged for a new primary dwelling on the same site. In all cases, the impact fee for the ADU must be less than the primary dwelling. Otherwise, the fee is not calculated proportionately. When utilizing proportions, careful consideration should be given to the impacts on costs, feasibility, and, ultimately, the creation of ADUs. In the case of the example above, anything greater than 50 percent of the primary dwelling could be considered a constraint on the development of ADUs. A proportional fee shall not be greater than 100 percent, as when a proposed ADU exceeds the size of the existing primary dwelling.

For purposes of calculating the fees for an ADU on a lot with a multifamily dwelling, the proportionality shall be based on the average square footage of the units within that multifamily dwelling structure. For ADUs converting existing space with a 150 square-foot expansion, a total ADU square footage over 750 square feet could trigger the proportionate fee requirement. (Gov. Code, § 65852.2, subd. (f)(3)(A).)

- **Can local agencies, special districts, or water corporations waive impact fees?**

Yes. Agencies can waive impact and any other fees for ADUs. Also, local agencies may use fee deferrals for applicants.

- **Can school districts charge impact fees?**

Yes. School districts are authorized to, but do not have to, levy impact fees for ADUs greater than 500 square feet pursuant to Section 17620 of the Education Code. ADUs less than 500 square feet are not subject to school impact fees. Local agencies are encouraged to coordinate with school districts to carefully weigh the importance of promoting ADUs, ensuring appropriate nexus studies and appropriate fees to facilitate construction or reconstruction of adequate school facilities.

- **What types of fees are considered impact fees?**

Impact fees charged for the construction of ADUs must be determined in accordance with the Mitigation Fee Act and generally include any monetary exaction that is charged by a local agency in connection with the approval of an ADU, including impact fees, for the purpose of defraying all or a portion of the cost of public facilities relating to the ADU. A local agency, special district, or water corporation shall not consider ADUs as a new residential use for the purposes of calculating connection fees or capacity charges for utilities, including water and sewer services. However, these provisions do not apply to ADUs that are constructed concurrently with a new single-family home. (Gov. Code, §§ 65852.2, subd. (f), and 66000.)

- **Can I still be charged water and sewer connection fees?**

ADUs converted from existing space and JADUs shall not be considered by a local agency, special district, or water corporation to be a new residential use for purposes of calculating connection fees or capacity charges for utilities, unless constructed with a new single-family dwelling. The connection fee or capacity charge shall be proportionate to the burden of the proposed ADU, based on its square footage or plumbing fixtures as compared to the primary dwelling. ADU Law does not cover monthly charge fees. (Gov. Code, § 65852.2, subd. (f)(2).)

H) Ministerially Approved ADUs and Junior ADUs (JADUs) Not Subject to Local Standards

- **Are local agencies required to comply with Government Code section 65852.2, subdivision (e)?**

Yes. All local agencies must comply with subdivision (e). This subdivision requires the ministerial approval of ADUs within a residential or mixed-use zone. The subdivision creates four categories of ADUs that should not be subject to other specified areas of State ADU Law, most notably zoning and development standards. For example, ADUs under this subdivision should not have to comply with lot coverage, setbacks, heights, and unit sizes. However, ADUs under this subdivision must meet the building code and health and safety requirements. The four categories of ADUs under subdivision (e)(1) are:

- (A) One ADU and one JADU are permitted per lot within the proposed space of a single-family dwelling or existing space of a single-family dwelling or accessory structure that meets specified requirements such as exterior access and setbacks for fire and safety.
- (B) One detached new construction ADU that does not exceed four-foot side and rear yard setbacks. This ADU may be combined on the same lot with a JADU, and may be required to meet a maximum unit size requirement of 800 square feet and a height limitation of 16 feet.

(C) Multiple ADUs within the portions of multifamily structures that are not used as livable space. Local agencies must allow at least one of these types of ADUs and up to 25 percent of the existing multifamily structures.

(D) Up to two detached ADUs on a lot that has existing multifamily dwellings that are subject to height limits of 16 feet and four-foot rear and side yard setbacks.

The above four categories may be combined. For example, local governments must allow (A) and (B) together or (C) and (D) together.

The most common ADU that can be created under subdivision (e) is a conversion of proposed or existing space of a single-family dwelling or accessory structure into an ADU, without any prescribed size limitations, height, setback, lot coverage, architectural review, landscape, or other development standards. This would enable the conversion of an accessory structure, such as a 2,000 square-foot garage, to an ADU without any additional requirements other than compliance with building standards for dwellings.

These types of ADUs are also eligible for a 150 square-foot expansion (see discussion below).

ADUs created under subdivision (e) shall not be required to provide parking if the ADU qualifies for one of the five exemptions listed under subdivision (d). Moreover, these units shall not, as a condition for ministerial approval, be required to correct any existing or created nonconformity. Subdivision (e) ADUs shall be required to be rented for terms longer than 30 days and only require fire sprinklers if fire sprinklers are required for the primary residence. These ADUs shall not be counted as units when calculating density for the general plan and are not subject to owner occupancy.

- **How many ADUs are allowed on a multifamily site under subdivision (e)?**

Under subdivision (e), an applicant may apply to build up to two detached ADUs and at least one interior ADU up to 25 percent of the number of units in the proposed or existing multifamily dwelling. All interior ADUs, however, must be converted from non-livable space, which is not a requirement under subdivision (a) for ADUs associated with single-family sites. It should also be noted that if there is no existing non-livable space within a multifamily structure, an applicant would not be able to build an interior ADU under subdivision (e). Attached ADUs are also prohibited under this subdivision.

By contrast, under subdivision (a), an applicant may choose to build one attached, detached, or conversion ADU on a site with a proposed or existing multifamily dwelling, with local objective development standards applied in the same manner as they would be applied to an ADU proposed on a single-family site under subdivision (a). JADUs can only be constructed on a site with a proposed or existing single-family dwelling; however, a JADU cannot be constructed on a multifamily site concurrently with an ADU under subdivision (a).

- **Can I convert my accessory structure into an ADU?**

Yes. The conversion of garages, sheds, barns, and other existing accessory structures, either attached or detached from the primary dwelling, into ADUs is permitted and promoted through State ADU Law.

These conversions of accessory structures are not subject to any additional development standards, such as unit size, height, and lot coverage requirements, and shall be from existing space that can be made safe under building and safety codes. A local agency should not set limits based on when the structure was created, and the structure must meet standards for health and safety.

Additionally, the two ADUs allowed on each multifamily site under subdivision (e) may be converted from existing detached structures on the site. Existing, detached accessory structures on a lot with an existing multifamily dwelling that are converted to ADUs cannot be required to be modified to correct for a non-conforming use. Both structures must be accessory structures detached from the primary residence, and because they are conversions of existing structures, these ADUs would not have to comply with the four-foot setback requirements under subdivision (e) if the existing structures are closer than four feet to the property line. This would also mean that the 16-foot height limitation would not apply if the existing structure were taller than 16 feet. Conversion ADUs in this scenario would not be subject to any square footage restrictions as long as they are built within the footprint of the previous structure.

- **Can an ADU created by converting existing space be expanded?**

Yes. An ADU created within the existing or proposed space of a single-family dwelling or accessory structure can be expanded beyond the physical dimensions of the structure. Per State ADU Law, only an ADU created within an existing accessory structure may be expanded up to 150 square feet without application of local development standards, but this expansion shall be limited to accommodating ingress and egress. An ADU created within the space of an existing or proposed single-family dwelling is subject to local development standards. An example of where this expansion could be applicable is for the creation of a staircase to reach a second story ADU. These types of ADUs shall conform to setbacks sufficient for fire and safety.

A local agency may allow for an expansion beyond 150 square feet, though the ADU would have to comply with the size maximums as per State ADU Law or per a local agency's adopted ordinance. (Gov. Code, § 65852.2, subd. (e)(1)(i).)

As a JADU is limited to being created within the walls of a primary residence and not an accessory structure, this expansion of up to 150 square feet does not pertain to JADUs.

- **Can an ADU be constructed in the non-livable spaces of the non-residential portions of a mixed-use development?**

No. The non-livable space used to create an ADU or ADUs under Government Code section 65852.2, subdivision (e)(1)(C), should be limited to the residential areas of a mixed-use development, and not the areas used for commercial or other activities. The parking and storage areas for these non-residential uses would also be excluded from potential ADU development.

I) Nonconforming Zoning Standards

- **Does the creation of an ADU require the applicant to carry out public improvements?**

No physical improvements shall be required for the creation or conversion of an ADU. Any requirement to carry out public improvements is beyond what is required for the creation of an ADU, as per State ADU Law. For example, an applicant shall not be required to improve sidewalks or carry out street or access improvements to create an ADU. Additionally, as a condition for ministerial approval of an ADU, an applicant shall not be required to correct nonconforming zoning conditions. (Gov. Code, § 65852.2, subd. (e)(2).)

J) Renter- and Owner-Occupancy

- **Are rental terms allowed?**

Yes. Local agencies may require that the property be used for rentals of terms longer than 30 days. ADUs permitted ministerially, under subdivision (e), shall be rented for terms longer than 30 days. (Gov. Code, §65852.2, subds. (a)(6) and (e)(4).)

- **Are there any owner-occupancy requirements for ADUs?**

No. Prior to recent legislation, ADU laws allowed local agencies to elect whether the primary dwelling or ADU was required to be occupied by an owner. The updates to State ADU Law removed the owner-occupancy requirement for newly created ADUs effective January 1, 2020. The new owner-occupancy exclusion is set to expire on December 31, 2024; however, local agencies may not retroactively require owner-occupancy for ADUs permitted between January 1, 2020, and December 31, 2024.

However, should a property have both an ADU and JADU, JADU law requires owner-occupancy of either the newly created JADU or the single-family residence. Under this specific circumstance, a lot with an ADU would be subject to owner-occupancy requirements. (Gov. Code, § 65852.22, subd. (a)(2).)

K) Fire Sprinkler Requirements

- **Can fire sprinklers be required for ADUs?**

Installation of fire sprinklers may not be required in ADUs (attached, detached, or conversion) where sprinklers were not required by building codes for the existing primary residence. For example, a detached single-family home designed and constructed decades ago would not have been required to have fire sprinklers installed under the applicable building code at the time. However, if the same primary dwelling recently underwent significant alteration and is now required to have fire sprinklers, any ADU created after that alteration must be provided with fire sprinklers. (Gov. Code, § 65852.2, subds. (a)(1)(D)(xii) and (e)(3).)

Please note, for ADUs created on lots with multifamily residential structures, the entire residential structure shall serve as the “primary residence” for the purposes of this analysis. Therefore, if the multifamily structure is served by fire sprinklers, the ADU can be required to install fire sprinklers.

For additional guidance on ADUs and fire sprinkler system requirements, please consult the Office of the State Fire Marshal.

L) Solar System Requirements

- **Are solar systems required for newly constructed ADUs?**

Yes, newly constructed ADUs are subject to the California Energy Code requirement (excluding manufactured homes) to provide solar systems if the unit(s) is a newly constructed, non-manufactured, detached ADU (though some exceptions apply). Per the California Energy Commission (CEC), the solar systems can be installed on the ADU or on the primary dwelling unit. ADUs that are constructed within existing space, or as an addition to existing homes, including detached additions where an existing detached building is converted from non-residential to residential space, are not subject to the Energy Code requirement to provide solar systems.

Please refer to the CEC on this matter. For more information, see the CEC’s website at www.energy.ca.gov. You may email your questions to title24@energy.ca.gov, or contact the Energy Standards Hotline at 800-772-3300. CEC memos can also be found on HCD’s website at <https://www.hcd.ca.gov/policy-research/AccessoryDwellingUnits.shtml>.

See HCD’s [Information Bulletin 2020-10](#) for information on the applicability of California solar requirements to manufactured housing.

3. JADUs – Government Code Section 65852.22

- **What is a JADU?**

A “junior accessory dwelling unit” or JADU is a unit that is no more than 500 square feet in size and contained entirely within a single-family residence. A JADU may include separate sanitation facilities or may share sanitation facilities with the existing structure. (Gov. Code, § 65852.22, subd. (h)(1).)

- **Are two JADUs allowed on a lot?**

No. A JADU may be created on a lot zoned for single-family residences with one primary dwelling. The JADU may be created within the walls of the proposed or existing single-family residence, including attached garages, as attached garages are considered within the walls of the existing single-family residence. Please note that JADUs created in the attached garage are not subject to the same parking protections as ADUs and could be required by the local agency to provide replacement parking.

JADUs are limited to one per residential lot with a single-family residence. Lots with multiple detached single-family dwellings are not eligible to have JADUs. (Gov. Code, § 65852.22, subd. (a)(1).)

- **Are JADUs required to have an interior connection to the primary dwelling?**

No. Although JADUs are required to be within the walls of the primary dwelling, they are not required to have an interior connection to the primary dwelling. That said, JADUs may share a significant interior connection to the primary dwelling, as they are allowed to share bathroom facilities with the primary dwelling.

- **Are JADUs allowed in detached accessory structures?**

No, JADUs are not allowed in accessory structures. The creation of a JADU must be within the single-family residence. As noted above, attached garages are eligible for JADU creation. (Gov. Code, § 65852.22, subds. (a)(1) and (a)(4).)

- **Are JADUs allowed to be increased up to 150 square feet when created within an existing structure?**

No. Only ADUs are allowed to add up to 150 square feet “beyond the physical dimensions of the existing accessory structure” to provide for ingress. (Gov. Code, § 65852.2, subd. (e)(1)(A)(i).)

This provision extends only to ADUs and excludes JADUs. A JADU is required to be created within the single-family residence.

- **Are there any owner-occupancy requirements for JADUs?**

Yes. The owner must reside in either the remaining portion of the primary residence or in the newly created JADU. (Gov. Code, § 65852.22, subd. (a)(2).)

4. Manufactured Homes

- **Are manufactured homes considered to be an ADU?**

Yes. An ADU is any residential dwelling unit with independent living facilities and permanent provisions for living, sleeping, eating, cooking and sanitation. An ADU includes a manufactured home. (Health & Saf. Code, § 18007.)

Health and Safety Code section 18007, subdivision (a): **“Manufactured home,”** for the purposes of this part, means a structure that was constructed on or after June 15, 1976, is transportable in one or more sections, is eight body feet or more in width, or 40 body feet or more in length, in the traveling mode, or, when erected on site, is 320 or more square feet, is built on a permanent chassis and designed to be used as a single-family dwelling with or without a foundation when connected to the required utilities, and includes the plumbing, heating, air conditioning, and electrical systems contained therein. “Manufactured home” includes any structure that meets all the requirements of this paragraph except the size requirements and with respect to which the manufacturer voluntarily files a certification and complies with the standards established under the National Manufactured Housing Construction and Safety Act of 1974 (42 U.S.C., Sec. 5401, and following).

5. Regional Housing Needs Allocation (RHNA) and the Housing Element

- **Do ADUs and JADUs count toward a local agency’s RHNA?**

Yes. Pursuant to Government Code section 65852.2 subdivision (m), and section 65583.1, ADUs and JADUs may be utilized towards the RHNA and Housing Element Annual Progress Report (APR) pursuant to Government Code section 65400. To credit a unit toward the RHNA, HCD and the Department of Finance (DOF) utilize the census definition of a housing unit. Generally, an ADU, and a JADU with shared sanitation facilities, and any other unit that meets the census definition and is reported to DOF as part of the DOF annual City and County Housing Unit Change Survey can be credited toward the RHNA based on the appropriate income level. The housing element or APR must include a reasonable methodology to demonstrate the level of affordability. Local governments can track actual or anticipated affordability to assure ADUs and JADUs are

counted towards the appropriate income category. For example, some local governments request and track information such as anticipated affordability as part of the building permit or other local applications. For more information, please contact HousingElements@hcd.ca.gov.

- **What analysis is required to count ADUs toward the RHNA in the housing element?**

To count ADUs towards the RHNA in the housing element, local agencies must generally use a three-part approach: (1) development trends, (2) anticipated affordability, and (3) resources and incentives. Development trends must consider ADUs permitted in the prior planning period and may also consider more recent trends. Anticipated affordability can use a variety of methods to estimate the affordability by income group. Common approaches include rent surveys of ADUs, using rent surveys and square footage assumptions and data available through the APR pursuant to Government Code section 65400. Resources and incentives include policies and programs to encourage ADUs, such as prototype plans, fee waivers, expedited procedures, and affordability monitoring programs.

- **Are ADUs required to be addressed in the housing element?**

Yes. The housing element must include a description of zoning available to permit ADUs, including development standards and analysis of potential constraints on the development of ADUs. The element must include programs as appropriate to address identified constraints. In addition, housing elements must include a plan that incentivizes and promotes the creation of ADUs that can offer affordable rents for very low-, low-, or moderate-income households and requires HCD to develop a list of state grants and financial incentives in connection with the planning, construction, and operation of affordable ADUs. (Gov. Code, § 65583 and Health & Saf. Code, § 50504.5.) This list is available on HCD's ADU webpage.

6. Homeowners Associations

- **Can my local Homeowners Association (HOA) prohibit the construction of an ADU or JADU?**

No. Assembly Bill 670 (2019) and AB 3182 (2020) amended Section 4751, 4740, and 4741 of the Civil Code to preclude common interest developments from prohibiting or unreasonably restricting the construction or use, including the renting or leasing of, an ADU on a lot zoned for single-family residential use. Covenants, conditions and restrictions (CC&Rs) that either effectively prohibit or unreasonably restrict the construction or use of an ADU or JADU on such lots are void and unenforceable or may be liable for actual damages and payment of a civil penalty. Applicants who encounter issues with creating ADUs or JADUs within CC&Rs are encouraged to reach out to HCD for additional guidance. Refer to Section 4100 of the Civil Code for the meaning of a common interest development.

7. ADU Ordinances and Local Agencies

- **Are ADU ordinances existing prior to new 2020 laws null and void?**

Maybe. ADU ordinances existing prior to the new 2020 laws, as well as newly adopted ordinances, are null and void when they conflict with State ADU Law. Subdivision (a)(4) of Government Code section 65852.2 states that an ordinance that fails to meet the requirements of subdivision (a) shall be null and void, and the local agency shall apply the state standards until a compliant ordinance is adopted. See the question on Enforcement below for more detail.

- **Do local agencies have to adopt an ADU ordinance?**

No. Local governments may choose not to adopt an ADU ordinance. Should a local government choose not to adopt an ADU ordinance, any proposed ADU development would be subject only to standards set in State ADU Law. If a local agency adopts an ADU ordinance, it may impose zoning, development, design, and other standards in compliance with State ADU Law.

- **Is a local government required to send an ADU ordinance to HCD?**

Yes. A local government, upon adoption of an ADU ordinance, must submit a copy of the adopted ordinance to HCD within 60 days after adoption. After the adoption of an ordinance, HCD may review and submit written findings to the local agency as to whether the ordinance complies with State ADU Law. (Gov. Code, § 65852.2, subd. (h)(1).)

Local governments may also submit a draft ADU ordinance for preliminary review by HCD. HCD recommends that local agencies do so, as this provides local agencies the opportunity to receive feedback on their ordinance and helps to ensure compliance with State ADU Law prior to adoption.

- **Are charter cities and counties subject to the new ADU laws?**

Yes. State ADU Law applies to a local agency, which is defined as a city, county, or city and county, whether general law or chartered. (Gov. Code, § 65852.2, subd. (j)(5)).

Further, pursuant to Chapter 659, Statutes of 2019 (AB 881), the Legislature found and declared State ADU Law addresses “...a matter of statewide concern rather than a municipal affair, as that term is used in Section 5 of Article XI of the California Constitution” and concluded that State ADU Law applies to all cities, including charter cities.

- **Do the new ADU laws apply to jurisdictions located in the California Coastal Zone?**

Yes. ADU laws apply to jurisdictions in the California Coastal Zone, but do not

necessarily alter or lessen the effect or application of Coastal Act resource protection policies. (Gov. Code, § 65852.22, subd. (l).) Coastal localities should seek to harmonize the goals of protecting coastal resources and addressing housing needs of Californians. For example, where appropriate, localities should amend Local Coastal Programs for California Coastal Commission review to comply with the California Coastal Act and new ADU laws. For more information, see the [California Coastal Commission 2020 Memo](#) and reach out to the locality's local Coastal Commission district office.

- **Do the new ADU laws apply to areas governed by the Tahoe Regional Planning Agency (TRPA)?**

Possibly. The TRPA was formed through a bistate compact between California and Nevada. Under the compact, TRPA has authority to adopt ordinances, rules, and regulations, and those ordinances, rules, and regulations are considered federal law. Under this authority, TRPA has adopted certain restrictions that effectively limit lot coverage on developed land. State ADU Law may conflict to a degree with the TRPA standards, and to the extent that it does, the TRPA law likely preempts or overrides State ADU Law.

8. Enforcement

- **Does HCD have enforcement authority over ADU ordinances?**

Yes. Pursuant to Government Code section 65852.2, subdivision (h), local agencies are required to submit a copy of newly adopted ADU ordinances within 60 days of adoption. HCD may thereafter provide written findings to the local agency as to whether the ordinance complies with State ADU Law. If HCD finds that the local agency's ADU ordinance does not comply with State ADU Law, HCD must provide a reasonable time, no longer than 30 days, for the local agency to respond. The local agency shall either amend its ordinance in accordance with HCD's written findings or adopt the ordinance without changes but include findings in its resolution explaining why the ordinance complies with State ADU Law despite HCD's findings. If the local agency does not amend its ordinance in accordance with HCD's findings or adopt a resolution explaining why the ordinance is compliant, HCD shall notify the local agency that it is in violation of State ADU Law. HCD may also notify the Attorney General of the local agency's violation. While an ordinance is non-compliant, the local agency shall apply state standards.

In addition, HCD may review, adopt, amend, or repeal guidelines to implement uniform standards or criteria that supplement or clarify State ADU Law.

9. Senate Bill (SB) 9 (2021)

- **Does SB 9 have any impact on ADUs?**

SB 9 (Gov. Code Sections 66452.6, 65852.21 and 66411.7) contains some overlaps with State ADU Law, but only on a relatively small number of topics. Please note that although HCD does not administer or enforce SB 9, violations of SB 9 may concurrently violate other housing laws that HCD does enforce, including, but not limited to, State ADU Law and State Housing Element Law. As local jurisdictions implement SB 9, including adopting local

ordinances, it is important to keep these and other housing laws in mind. For details regarding SB 9, please see HCD's [SB 9 Factsheet](#).

10. Funding

- **Is there financial assistance or funding available for ADUs?**

Effective September 20, 2021, the California Housing Finance Agency's (CalHFA) ADU Grant Program provides up to \$40,000 in assistance to reimburse qualifying homeowners for predevelopment costs necessary to build and occupy an ADU or JADU on a lot with a single-family dwelling unit. The ADU Grant Program is intended to create more housing units in California by providing a grant to reimburse qualifying homeowners for predevelopment costs. Predevelopment costs include, but are not limited to, architectural designs, permits, soil tests, impact fees, property surveys, and energy reports. For additional information or questions, please see CalHFA's ADU Grant Program at <https://www.calhfa.ca.gov/adu> or contact the CalHFA Single Family Lending Division at (916) 326-8033 or SFLending@calhfa.ca.gov.

Resources



Attachment 1: Statutory Changes (Strikeout/Italics and Underline)

**GOV. CODE: TITLE 7, DIVISION 1, CHAPTER 4,
ARTICLE 2**
**Combined changes from AB 345, AB 3182, AB 881,
AB 68, and SB 13** (Changes noted in strikeout,
underline/italics)

Effective January 1, 2022, Section 65852.2 of the Government Code is amended to read:

65852.2.

(a)(1) A local agency may, by ordinance, provide for the creation of accessory dwelling units in areas zoned to allow single-family or multifamily dwelling residential use. The ordinance shall do all of the following:

(A) Designate areas within the jurisdiction of the local agency where accessory dwelling units may be permitted. The designation of areas may be based on the adequacy of water and sewer services and the impact of accessory dwelling units on traffic flow and public safety. A local agency that does not provide water or sewer services shall consult with the local water or sewer service provider regarding the adequacy of water and sewer services before designating an area where accessory dwelling units may be permitted.

(B)(i) Impose standards on accessory dwelling units that include, but are not limited to, parking, height, setback, landscape, architectural review, maximum size of a unit, and standards that prevent adverse impacts on any real property that is listed in the California Register of ~~Historic~~ *Historical* Resources. These standards shall not include requirements on minimum lot size.

(ii) Notwithstanding clause (i), a local agency may reduce or eliminate parking requirements for any accessory dwelling unit located within its jurisdiction.

(C) Provide that accessory dwelling units do not exceed the allowable density for the lot upon which the accessory dwelling unit is located, and that accessory dwelling units are a residential use that is consistent with the existing general plan and zoning designation for the lot.

(D) Require the accessory dwelling units to comply with all of the following:

(i) ~~The~~ *Except as provided in Section 65852.26, the* accessory dwelling unit may be rented separate from the primary residence, but may not be sold or otherwise conveyed separate from the primary residence.

(ii) The lot is zoned to allow single-family or multifamily dwelling residential use and includes a proposed or existing dwelling.

(iii) The accessory dwelling unit is either attached to, or located within, the proposed or existing primary dwelling, including attached garages, storage areas or similar uses, or an accessory structure or detached from the proposed or existing primary dwelling and located on the same lot as the proposed or existing primary dwelling.

(iv) If there is an existing primary dwelling, the total floor area of an attached accessory dwelling unit shall not exceed 50 percent of the existing primary dwelling.

(v) The total floor area for a detached accessory dwelling unit shall not exceed 1,200 square feet.

(vi) No passageway shall be required in conjunction with the construction of an accessory dwelling unit.

(vii) No setback shall be required for an existing living area or accessory structure or a structure constructed in the same location and to the same dimensions as an existing structure that is

converted to an accessory dwelling unit or to a portion of an accessory dwelling unit, and a setback of no more than four feet from the side and rear lot lines shall be required for an accessory dwelling unit that is not converted from an existing structure or a new structure constructed in the same location and to the same dimensions as an existing structure.

(viii) Local building code requirements that apply to detached dwellings, as appropriate.

(ix) Approval by the local health officer where a private sewage disposal system is being used, if required.

(x)(I) Parking requirements for accessory dwelling units shall not exceed one parking space per accessory dwelling unit or per bedroom, whichever is less. These spaces may be provided as tandem parking on a driveway.

(II) Offstreet parking shall be permitted in setback areas in locations determined by the local agency or through tandem parking, unless specific findings are made that parking in setback areas or tandem parking is not feasible based upon specific site or regional topographical or fire and life safety conditions.

(III) This clause shall not apply to an accessory dwelling unit that is described in subdivision (d).

(xi) When a garage, carport, or covered parking structure is demolished in conjunction with the construction of an accessory dwelling unit or converted to an accessory dwelling unit, the local agency shall not require that those offstreet parking spaces be replaced.

(xii) Accessory dwelling units shall not be required to provide fire sprinklers if they are not required for the primary residence.

(1) The ordinance shall not be considered in the application of any local ordinance, policy, or program to limit residential growth.

(2) A permit application for an accessory dwelling unit or a junior accessory dwelling unit shall be considered and approved ministerially without discretionary review or a hearing, notwithstanding Section 65901 or 65906 or any local ordinance regulating the issuance of variances or special use permits. The permitting agency shall act on the application to create an accessory dwelling unit or a junior accessory dwelling unit within 60 days from the date the local agency receives a completed application if there is an existing single-family or multifamily dwelling on the lot. If the permit application to create an accessory dwelling unit or a junior accessory dwelling unit is submitted with a permit application to create a new single-family dwelling on the lot, the permitting agency may delay acting on the permit application for the accessory dwelling unit or the junior accessory dwelling unit until the permitting agency acts on the permit application to create the new single-family dwelling, but the application to create the accessory dwelling unit or junior accessory dwelling unit shall be considered without discretionary review or hearing. If the applicant requests a delay, the 60-day time period shall be tolled for the period of the delay. [If the local agency has not acted upon the completed application within 60 days, the application shall be deemed approved.](#) A local agency may charge a fee to reimburse it for costs incurred to implement this paragraph, including the costs of adopting or amending any ordinance that provides for the creation of an accessory dwelling unit.

(3) An existing ordinance governing the creation of an accessory dwelling unit by a local agency or an accessory dwelling ordinance adopted by a local agency shall provide an approval process that includes only ministerial provisions for the approval of accessory dwelling units and shall not include any discretionary processes, provisions, or requirements for those units, except as otherwise provided in this subdivision. If a local agency has an existing accessory dwelling unit ordinance that fails to meet the requirements of this subdivision, that ordinance shall be null and void and that agency shall thereafter apply the standards established in this subdivision for the approval of accessory dwelling units, unless and until the agency adopts an

ordinance that complies with this section.

(4) No other local ordinance, policy, or regulation shall be the basis for the delay or denial of a building permit or a use permit under this subdivision.

(5) This subdivision establishes the maximum standards that local agencies shall use to evaluate a proposed accessory dwelling unit on a lot that includes a proposed or existing single-family dwelling. No additional standards, other than those provided in this subdivision, shall be used or imposed, including any owner-occupant requirement, except that a local agency may require that the property be used for rentals of terms longer than 30 days.

(6) A local agency may amend its zoning ordinance or general plan to incorporate the policies, procedures, or other provisions applicable to the creation of an accessory dwelling unit if these provisions are consistent with the limitations of this subdivision.

(7) An accessory dwelling unit that conforms to this subdivision shall be deemed to be an accessory use or an accessory building and shall not be considered to exceed the allowable density for the lot upon which it is located, and shall be deemed to be a residential use that is consistent with the existing general plan and zoning designations for the lot. The accessory dwelling unit shall not be considered in the application of any local ordinance, policy, or program to limit residential growth.

(b) When a local agency that has not adopted an ordinance governing accessory dwelling units in accordance with subdivision (a) receives an application for a permit to create an accessory dwelling unit pursuant to this subdivision, the local agency shall approve or disapprove the application ministerially without discretionary review pursuant to subdivision (a). The permitting agency shall act on the application to create an accessory dwelling unit or a junior accessory dwelling unit within 60 days from the date the local agency receives a completed application if there is an existing single-family or multifamily dwelling on the lot. If the permit application to create an accessory dwelling unit or a junior accessory dwelling unit is submitted with a permit application to create a new single-family dwelling on the lot, the permitting agency may delay acting on the permit application for the accessory dwelling unit or the junior accessory dwelling unit until the permitting agency acts on the permit application to create the new single-family dwelling, but the application to create the accessory dwelling unit or junior accessory dwelling unit shall still be considered ministerially without discretionary review or a hearing. If the applicant requests a delay, the 60-day time period shall be tolled for the period of the delay. If the local agency has not acted upon the completed application within 60 days, the application shall be deemed approved.

(c) (1) Subject to paragraph (2), a local agency may establish minimum and maximum unit size requirements for both attached and detached accessory dwelling units.

(2) Notwithstanding paragraph (1), a local agency shall not establish by ordinance any of the following:

(A) A minimum square footage requirement for either an attached or detached accessory dwelling unit that prohibits an efficiency unit.

(B) A maximum square footage requirement for either an attached or detached accessory dwelling unit that is less than either of the following:

(i) 850 square feet.

(ii) 1,000 square feet for an accessory dwelling unit that provides more than one bedroom.

(C) Any other minimum or maximum size for an accessory dwelling unit, size based upon a percentage of the proposed or existing primary dwelling, or limits on lot coverage, floor area ratio, open space, and minimum lot size, for either attached or detached dwellings that does not permit at least an 800 square foot accessory dwelling unit that is at least 16 feet in height with four-foot side and rear yard setbacks to be constructed in compliance with all other local

development standards.

(d) Notwithstanding any other law, a local agency, whether or not it has adopted an ordinance governing accessory dwelling units in accordance with subdivision (a), shall not impose parking standards for an accessory dwelling unit in any of the following instances:

- (1) The accessory dwelling unit is located within one-half mile walking distance of public transit.
- (2) The accessory dwelling unit is located within an architecturally and historically significant historic district.
- (3) The accessory dwelling unit is part of the proposed or existing primary residence or an accessory structure.
- (4) When on-street parking permits are required but not offered to the occupant of the accessory dwelling unit.
- (5) When there is a car share vehicle located within one block of the accessory dwelling unit.

(e)(1) Notwithstanding subdivisions (a) to (d), inclusive, a local agency shall ministerially approve an application for a building permit within a residential or mixed-use zone to create any of the following:

(A) One accessory dwelling unit ~~or~~ *and* one junior accessory dwelling unit per lot with a proposed or existing single-family dwelling if all of the following apply:

- (i) The accessory dwelling unit or junior accessory dwelling unit is within the proposed space of a single-family dwelling or existing space of a single-family dwelling or accessory structure and may include an expansion of not more than 150 square feet beyond the same physical dimensions as the existing accessory structure. An expansion beyond the physical dimensions of the existing accessory structure shall be limited to accommodating ingress and egress.
- (ii) The space has exterior access from the proposed or existing single-family dwelling.
- (iii) The side and rear setbacks are sufficient for fire and safety.
- (iv) The junior accessory dwelling unit complies with the requirements of Section 65852.22.

(B) One detached, new construction, accessory dwelling unit that does not exceed four-foot side and rear yard setbacks for a lot with a proposed or existing single-family dwelling. The accessory dwelling unit may be combined with a junior accessory dwelling unit described in subparagraph (A). A local agency may impose the following conditions on the accessory dwelling unit:

- (i) A total floor area limitation of not more than 800 square feet.
- (ii) A height limitation of 16 feet.

(C)(i) Multiple accessory dwelling units within the portions of existing multifamily dwelling structures that are not used as livable space, including, but not limited to, storage rooms, boiler rooms, passageways, attics, basements, or garages, if each unit complies with state building standards for dwellings.

(ii) A local agency shall allow at least one accessory dwelling unit within an existing multifamily dwelling and shall allow up to 25 percent of the existing multifamily dwelling units.

(D) Not more than two accessory dwelling units that are located on a lot that has an existing multifamily dwelling, but are detached from that multifamily dwelling and are subject to a height limit of 16 feet and four-foot rear yard and side setbacks.

(2) A local agency shall not require, as a condition for ministerial approval of a permit application for the creation of an accessory dwelling unit or a junior accessory dwelling unit, the correction of nonconforming zoning conditions.

(3) The installation of fire sprinklers shall not be required in an accessory dwelling unit if sprinklers are not required for the primary residence.

(4) A local agency shall require that a rental of the accessory dwelling unit created pursuant to this subdivision be for a term longer than 30 days.

(5) A local agency may require, as part of the application for a permit to create an accessory

dwelling unit connected to an onsite wastewater treatment system, a percolation test completed within the last five years, or, if the percolation test has been recertified, within the last 10 years.

(6) Notwithstanding subdivision (c) and paragraph (1) a local agency that has adopted an ordinance by July 1, 2018, providing for the approval of accessory dwelling units in multifamily dwelling structures shall ministerially consider a permit application to construct an accessory dwelling unit that is described in paragraph (1), and may impose standards including, but not limited to, design, development, and historic standards on said accessory dwelling units. These standards shall not include requirements on minimum lot size.

(f) (1) Fees charged for the construction of accessory dwelling units shall be determined in accordance with Chapter 5 (commencing with Section 66000) and Chapter 7 (commencing with Section 66012).

(2) An accessory dwelling unit shall not be considered by a local agency, special district, or water corporation to be a new residential use for purposes of calculating connection fees or capacity charges for utilities, including water and sewer service, unless the accessory dwelling unit was constructed with a new single-family dwelling.

(3) (A) A local agency, special district, or water corporation shall not impose any impact fee upon the development of an accessory dwelling unit less than 750 square feet. Any impact fees charged for an accessory dwelling unit of 750 square feet or more shall be charged proportionately in relation to the square footage of the primary dwelling unit.

(B) For purposes of this paragraph, "impact fee" has the same meaning as the term "fee" is defined in subdivision

(b) of Section 66000, except that it also includes fees specified in Section 66477. "Impact fee" does not include any connection fee or capacity charge charged by a local agency, special district, or water corporation.

(4) For an accessory dwelling unit described in subparagraph (A) of paragraph (1) of subdivision (e), a local agency, special district, or water corporation shall not require the applicant to install a new or separate utility connection directly between the accessory dwelling unit and the utility or impose a related connection fee or capacity charge, unless the accessory dwelling unit was constructed with a new single-family home.

(5) For an accessory dwelling unit that is not described in subparagraph (A) of paragraph (1) of subdivision (e), a local agency, special district, or water corporation may require a new or separate utility connection directly between the accessory dwelling unit and the utility. Consistent with Section 66013, the connection may be subject to a connection fee or capacity charge that shall be proportionate to the burden of the proposed accessory dwelling unit, based upon either its square feet or the number of its drainage fixture unit (DFU) values, as defined in the Uniform Plumbing Code adopted and published by the International Association of Plumbing and Mechanical Officials, upon the water or sewer system. This fee or charge shall not exceed the reasonable cost of providing this service.

(g) This section does not limit the authority of local agencies to adopt less restrictive requirements for the creation of an accessory dwelling unit.

(h) (1) A local agency shall submit a copy of the ordinance adopted pursuant to subdivision (a) to the Department of Housing and Community Development within 60 days after adoption. After adoption of an ordinance, the department may submit written findings to the local agency as to whether the ordinance complies with this section.

(2) (A) If the department finds that the local agency's ordinance does not comply with this section, the department shall notify the local agency and shall provide the local agency with a reasonable time, no longer than 30 days, to respond to the findings before taking any other

action authorized by this section.

(B) The local agency shall consider the findings made by the department pursuant to subparagraph (A) and shall do one of the following:

(i) Amend the ordinance to comply with this section.

(ii) Adopt the ordinance without changes. The local agency shall include findings in its resolution adopting the ordinance that explain the reasons the local agency believes that the ordinance complies with this section despite the findings of the department.

(3)(A) If the local agency does not amend its ordinance in response to the department's findings or does not adopt a resolution with findings explaining the reason the ordinance complies with this section and addressing the department's findings, the department shall notify the local agency and may notify the Attorney General that the local agency is in violation of state law.

(B) Before notifying the Attorney General that the local agency is in violation of state law, the department may consider whether a local agency adopted an ordinance in compliance with this section between January 1, 2017, and January 1, 2020.

(i) The department may review, adopt, amend, or repeal guidelines to implement uniform standards or criteria that supplement or clarify the terms, references, and standards set forth in this section. The guidelines adopted pursuant to this subdivision are not subject to Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2.

(j) As used in this section, the following terms mean:

(1) "Accessory dwelling unit" means an attached or a detached residential dwelling unit that provides complete independent living facilities for one or more persons and is located on a lot with a proposed or existing primary residence. It shall include permanent provisions for living, sleeping, eating, cooking, and sanitation on the same parcel as the single-family or multifamily dwelling is or will be situated. An accessory dwelling unit also includes the following:

(A) An efficiency unit.

(B) A manufactured home, as defined in Section 18007 of the Health and Safety Code.

(2) "Accessory structure" means a structure that is accessory and incidental to a dwelling located on the same lot.

(3) "Efficiency unit" has the same meaning as defined in Section 17958.1 of the Health and Safety Code.

(4) "Living area" means the interior habitable area of a dwelling unit, including basements and attics, but does not include a garage or any accessory structure.

(5) "Local agency" means a city, county, or city and county, whether general law or chartered.

(6) "Nonconforming zoning condition" means a physical improvement on a property that does not conform with current zoning standards.

(7) "Passageway" means a pathway that is unobstructed clear to the sky and extends from a street to one entrance of the accessory dwelling unit.

(8) "Proposed dwelling" means a dwelling that is the subject of a permit application and that meets the requirements for permitting.

(9) "Public transit" means a location, including, but not limited to, a bus stop or train station, where the public may access buses, trains, subways, and other forms of transportation that charge set fares, run on fixed routes, and are available to the public.

(10) "Tandem parking" means that two or more automobiles are parked on a driveway or in any other location on a lot, lined up behind one another.

(k) A local agency shall not issue a certificate of occupancy for an accessory dwelling unit before the local agency issues a certificate of occupancy for the primary dwelling.

(l) Nothing in this section shall be construed to supersede or in any way alter or lessen the

effect or application of the California Coastal Act of 1976 (Division 20 (commencing with Section 30000) of the Public Resources Code), except that the local government shall not be required to hold public hearings for coastal development permit applications for accessory dwelling units.

(m) A local agency may count an accessory dwelling unit for purposes of identifying adequate sites for housing, as specified in subdivision (a) of Section 65583.1, subject to authorization by the department and compliance with this division.

(n) In enforcing building standards pursuant to Article 1 (commencing with Section 17960) of Chapter 5 of Part 1.5 of Division 13 of the Health and Safety Code for an accessory dwelling unit described in paragraph (1) or (2) below, a local agency, upon request of an owner of an accessory dwelling unit for a delay in enforcement, shall delay enforcement of a building standard, subject to compliance with Section 17980.12 of the Health and Safety Code:

(1) The accessory dwelling unit was built before January 1, 2020.

(2) The accessory dwelling unit was built on or after January 1, 2020, in a local jurisdiction that, at the time the accessory dwelling unit was built, had a noncompliant accessory dwelling unit ordinance, but the ordinance is compliant at the time the request is made.

(o) This section shall remain in effect only until January 1, 2025, and as of that date is repealed.

(Becomes operative on January 1, 2025)

Section 65852.2 of the Government Code is amended to read (changes from January 1, 2021 statute noted in underline/italic):

65852.2.

(a)(1) A local agency may, by ordinance, provide for the creation of accessory dwelling units in areas zoned to allow single-family or multifamily dwelling residential use. The ordinance shall do all of the following:

(A) Designate areas within the jurisdiction of the local agency where accessory dwelling units may be permitted. The designation of areas may be based on the adequacy of water and sewer services and the impact of accessory dwelling units on traffic flow and public safety. A local agency that does not provide water or sewer services shall consult with the local water or sewer service provider regarding the adequacy of water and sewer services before designating an area where accessory dwelling units may be permitted.

(B)(i) Impose standards on accessory dwelling units that include, but are not limited to, parking, height, setback, landscape, architectural review, maximum size of a unit, and standards that prevent adverse impacts on any real property that is listed in the California Register of Historic Resources. These standards shall not include requirements on minimum lot size.

(ii) Notwithstanding clause (i), a local agency may reduce or eliminate parking requirements for any accessory dwelling unit located within its jurisdiction.

(C) Provide that accessory dwelling units do not exceed the allowable density for the lot upon which the accessory dwelling unit is located, and that accessory dwelling units are a residential use that is consistent with the existing general plan and zoning designation for the lot.

(D) Require the accessory dwelling units to comply with all of the following:

(i) The accessory dwelling unit may be rented separate from the primary residence, but may not be sold or otherwise conveyed separate from the primary residence.

(ii) The lot is zoned to allow single-family or multifamily dwelling residential use and includes a proposed or existing dwelling.

(iii) The accessory dwelling unit is either attached to, or located within, the proposed or

existing primary dwelling, including attached garages, storage areas or similar uses, or an accessory structure or detached from the proposed or existing primary dwelling and located on the same lot as the proposed or existing primary dwelling.

(iv) If there is an existing primary dwelling, the total floor area of an attached accessory dwelling unit shall not exceed 50 percent of the existing primary dwelling.

(v) The total floor area for a detached accessory dwelling unit shall not exceed 1,200 square feet.

(vi) No passageway shall be required in conjunction with the construction of an accessory dwelling unit.

(vii) No setback shall be required for an existing living area or accessory structure or a structure constructed in the same location and to the same dimensions as an existing structure that is converted to an accessory dwelling unit or a portion of an accessory dwelling unit, and a setback of no more than four feet from the side and rear lot lines shall be required for an accessory dwelling unit that is not converted from an existing structure or a new structure constructed in the same location and to the same dimensions as an existing structure.

(viii) Local building code requirements that apply to detached dwellings, as appropriate.

(ix) Approval by the local health officer where a private sewage disposal system is being used, if required.

(x)(I) Parking requirements for accessory dwelling units shall not exceed one parking space per accessory dwelling unit or per bedroom, whichever is less. These spaces may be provided as tandem parking on a driveway.

(II) Offstreet parking shall be permitted in setback areas in locations determined by the local agency or through tandem parking, unless specific findings are made that parking in setback areas or tandem parking is not feasible based upon specific site or regional topographical or fire and life safety conditions.

(III) This clause shall not apply to an accessory dwelling unit that is described in subdivision (d).

(xi) When a garage, carport, or covered parking structure is demolished in conjunction with the construction of an accessory dwelling unit or converted to an accessory dwelling unit, the local agency shall not require that those offstreet parking spaces be replaced.

(xii) Accessory dwelling units shall not be required to provide fire sprinklers if they are not required for the primary residence.

(2) The ordinance shall not be considered in the application of any local ordinance, policy, or program to limit residential growth.

(3) A permit application for an accessory dwelling unit or a junior accessory dwelling unit shall be considered and approved ministerially without discretionary review or a hearing, notwithstanding Section 65901 or 65906 or any local ordinance regulating the issuance of variances or special use permits. The permitting agency shall act on the application to create an accessory dwelling unit or a junior accessory dwelling unit within 60 days from the date the local agency receives a completed application if there is an existing single-family or multifamily dwelling on the lot. If the permit application to create an accessory dwelling unit or a junior accessory dwelling unit is submitted with a permit application to create a new single-family dwelling on the lot, the permitting agency may delay acting on the permit application for the accessory dwelling unit or the junior accessory dwelling unit until the permitting agency acts on the permit application to create the new single-family dwelling, but the application to create the accessory dwelling unit or junior accessory dwelling unit shall be considered without discretionary review or hearing. If the applicant requests a delay, the 60-day time period shall be tolled for the period of the delay. *If the local agency has not acted upon the completed application within 60 days, the application shall be deemed approved.* A local agency may charge a fee to reimburse it for costs incurred to implement this paragraph, including the costs

of adopting or amending any ordinance that provides for the creation of an accessory dwelling unit.

(4) An existing ordinance governing the creation of an accessory dwelling unit by a local agency or an accessory dwelling ordinance adopted by a local agency shall provide an approval process that includes only ministerial provisions for the approval of accessory dwelling units and shall not include any discretionary processes, provisions, or requirements for those units, except as otherwise provided in this subdivision. If a local agency has an existing accessory dwelling unit ordinance that fails to meet the requirements of this subdivision, that ordinance shall be null and void and that agency shall thereafter apply the standards established in this subdivision for the approval of accessory dwelling units, unless and until the agency adopts an ordinance that complies with this section.

(5) No other local ordinance, policy, or regulation shall be the basis for the delay or denial of a building permit or a use permit under this subdivision.

(6) (A) This subdivision establishes the maximum standards that local agencies shall use to evaluate a proposed

accessory dwelling unit on a lot that includes a proposed or existing single-family dwelling. No additional standards, other than those provided in this subdivision, shall be used or ~~imposed, including any owner-occupant requirement, except that~~ imposed except that, subject to subparagraph (B), a local agency may require an applicant for a permit issued pursuant to this subdivision to be an owner-occupant or that the property be used for rentals of terms longer than 30 days.

(B) Notwithstanding subparagraph (A), a local agency shall not impose an owner-occupant requirement on an accessory dwelling unit permitted between January 1, 2020, to January 1, 2025, during which time the local agency was prohibited from imposing an owner-occupant requirement.

(7) A local agency may amend its zoning ordinance or general plan to incorporate the policies, procedures, or other provisions applicable to the creation of an accessory dwelling unit if these provisions are consistent with the limitations of this subdivision.

(8) An accessory dwelling unit that conforms to this subdivision shall be deemed to be an accessory use or an accessory building and shall not be considered to exceed the allowable density for the lot upon which it is located, and shall be deemed to be a residential use that is consistent with the existing general plan and zoning designations for the lot. The accessory dwelling unit shall not be considered in the application of any local ordinance, policy, or program to limit residential growth.

(b) When a local agency that has not adopted an ordinance governing accessory dwelling units in accordance with subdivision (a) receives an application for a permit to create an accessory dwelling unit pursuant to this subdivision, the local agency shall approve or disapprove the application ministerially without discretionary review pursuant to subdivision (a). The permitting agency shall act on the application to create an accessory dwelling unit or a junior accessory dwelling unit within 60 days from the date the local agency receives a completed application if there is an existing single-family or multifamily dwelling on the lot. If the permit application to create an accessory dwelling unit or a junior accessory dwelling unit is submitted with a permit application to create a new single-family dwelling on the lot, the permitting agency may delay acting on the permit application for the accessory dwelling unit or the junior accessory dwelling unit until the permitting agency acts on the permit application to create the new single-family dwelling, but the application to create the accessory dwelling unit or junior accessory dwelling unit shall still be considered ministerially without discretionary review or a hearing. If the applicant requests a delay, the 60-day time period shall be tolled for the period of the delay. If

the local agency has not acted upon the completed application within 60 days, the application shall be deemed approved.

(c)(1) Subject to paragraph (2), a local agency may establish minimum and maximum unit size requirements for both attached and detached accessory dwelling units.

(2) Notwithstanding paragraph (1), a local agency shall not establish by ordinance any of the following:

(A) A minimum square footage requirement for either an attached or detached accessory dwelling unit that prohibits an efficiency unit.

(B) A maximum square footage requirement for either an attached or detached accessory dwelling unit that is less than either of the following:

(i) 850 square feet.

(ii) 1,000 square feet for an accessory dwelling unit that provides more than one bedroom.

(C) Any other minimum or maximum size for an accessory dwelling unit, size based upon a percentage of the proposed or existing primary dwelling, or limits on lot coverage, floor area ratio, open space, and minimum lot size, for either attached or detached dwellings that does not permit at least an 800 square foot accessory dwelling unit that is at least 16 feet in height with four-foot side and rear yard setbacks to be constructed in compliance with all other local development standards.

(d) Notwithstanding any other law, a local agency, whether or not it has adopted an ordinance governing accessory dwelling units in accordance with subdivision (a), shall not impose parking standards for an accessory dwelling unit in any of the following instances:

(1) The accessory dwelling unit is located within one-half mile walking distance of public transit.

(2) The accessory dwelling unit is located within an architecturally and historically significant historic district.

(3) The accessory dwelling unit is part of the proposed or existing primary residence or an accessory structure.

(4) When on-street parking permits are required but not offered to the occupant of the accessory dwelling unit.

(5) When there is a car share vehicle located within one block of the accessory dwelling unit.

(e)(1) Notwithstanding subdivisions (a) to (d), inclusive, a local agency shall ministerially approve an application for a building permit within a residential or mixed-use zone to create any of the following:

(A) One accessory dwelling unit ~~or~~ and one junior accessory dwelling unit per lot with a proposed or existing single-family dwelling if all of the following apply:

(i) The accessory dwelling unit or junior accessory dwelling unit is within the proposed space of a single-family dwelling or existing space of a single-family dwelling or accessory structure and may include an expansion of not more than 150 square feet beyond the same physical dimensions as the existing accessory structure. An expansion beyond the physical dimensions of the existing accessory structure shall be limited to accommodating ingress and egress.

(ii) The space has exterior access from the proposed or existing single-family dwelling.

(iii) The side and rear setbacks are sufficient for fire and safety.

(iv) The junior accessory dwelling unit complies with the requirements of Section 65852.22.

(B) One detached, new construction, accessory dwelling unit that does not exceed four-foot side and rear yard setbacks for a lot with a proposed or existing single-family dwelling. The accessory dwelling unit may be combined with a junior accessory dwelling unit described in subparagraph (A). A local agency may impose the following conditions on the accessory dwelling unit:

(i) A total floor area limitation of not more than 800 square feet.

(ii) A height limitation of 16 feet.

(C)(i) Multiple accessory dwelling units within the portions of existing multifamily dwelling structures that are not used as livable space, including, but not limited to, storage rooms, boiler rooms, passageways, attics, basements, or garages, if each unit complies with state building standards for dwellings.

(ii) A local agency shall allow at least one accessory dwelling unit within an existing multifamily dwelling and shall allow up to 25 percent of the existing multifamily dwelling units.

(D) Not more than two accessory dwelling units that are located on a lot that has an existing multifamily dwelling but are detached from that multifamily dwelling and are subject to a height limit of 16 feet and four-foot rear yard and side setbacks.

(2) A local agency shall not require, as a condition for ministerial approval of a permit application for the creation of an accessory dwelling unit or a junior accessory dwelling unit, the correction of nonconforming zoning conditions.

(3) The installation of fire sprinklers shall not be required in an accessory dwelling unit if sprinklers are not required for the primary residence.

(4) A local agency may require owner occupancy for either the primary dwelling or the accessory dwelling unit on a single-family lot, subject to the requirements of paragraph (6) of subdivision (a).

~~(4)~~ (5) A local agency shall require that a rental of the accessory dwelling unit created pursuant to this subdivision be for a term longer than 30 days.

~~(5)~~ (6) A local agency may require, as part of the application for a permit to create an accessory dwelling unit connected to an onsite wastewater treatment system, a percolation test completed within the last five years, or, if the percolation test has been recertified, within the last 10 years.

~~(6)~~ (7) Notwithstanding subdivision (c) and paragraph (1) a local agency that has adopted an ordinance by July 1, 2018, providing for the approval of accessory dwelling units in multifamily dwelling structures shall ministerially consider a permit application to construct an accessory dwelling unit that is described in paragraph (1), and may impose standards including, but not limited to, design, development, and historic standards on said accessory dwelling units. These standards shall not include requirements on minimum lot size.

(f) (1) Fees charged for the construction of accessory dwelling units shall be determined in accordance with Chapter 5 (commencing with Section 66000) and Chapter 7 (commencing with Section 66012).

(2) An accessory dwelling unit shall not be considered by a local agency, special district, or water corporation to be a new residential use for purposes of calculating connection fees or capacity charges for utilities, including water and sewer service, unless the accessory dwelling unit was constructed with a new single-family dwelling.

(3)(A) A local agency, special district, or water corporation shall not impose any impact fee upon the development of an accessory dwelling unit less than 750 square feet. Any impact fees charged for an accessory dwelling unit of 750 square feet or more shall be charged proportionately in relation to the square footage of the primary dwelling unit.

(B) For purposes of this paragraph, "impact fee" has the same meaning as the term "fee" is defined in subdivision

(b) of Section 66000, except that it also includes fees specified in Section 66477. "Impact fee" does not include any connection fee or capacity charge charged by a local agency, special district, or water corporation.

(4) For an accessory dwelling unit described in subparagraph (A) of paragraph (1) of subdivision (e), a local agency, special district, or water corporation shall not require the applicant to install a new or separate utility connection directly between the accessory

dwelling unit and the utility or impose a related connection fee or capacity charge, unless the accessory dwelling unit was constructed with a new single-family ~~home~~. [dwelling](#).

(5) For an accessory dwelling unit that is not described in subparagraph (A) of paragraph (1) of subdivision (e), a local agency, special district, or water corporation may require a new or separate utility connection directly between the accessory dwelling unit and the utility. Consistent with Section 66013, the connection may be subject to a connection fee or capacity charge that shall be proportionate to the burden of the proposed accessory dwelling unit, based upon either its square feet or the number of its drainage fixture unit (DFU) values, as defined in the Uniform Plumbing Code adopted and published by the International Association of Plumbing and Mechanical Officials, upon the water or sewer system. This fee or charge shall not exceed the reasonable cost of providing this service.

(g) This section does not limit the authority of local agencies to adopt less restrictive requirements for the creation of an accessory dwelling unit.

(h) (1) A local agency shall submit a copy of the ordinance adopted pursuant to subdivision (a) to the Department of Housing and Community Development within 60 days after adoption. After adoption of an ordinance, the department may submit written findings to the local agency as to whether the ordinance complies with this section.

(2)(A) If the department finds that the local agency's ordinance does not comply with this section, the department shall notify the local agency and shall provide the local agency with a reasonable time, no longer than 30 days, to respond to the findings before taking any other action authorized by this section.

(B) The local agency shall consider the findings made by the department pursuant to subparagraph (A) and shall do one of the following:

(i) Amend the ordinance to comply with this section.

(ii) Adopt the ordinance without changes. The local agency shall include findings in its resolution adopting the ordinance that explain the reasons the local agency believes that the ordinance complies with this section despite the findings of the department.

(3)(A) If the local agency does not amend its ordinance in response to the department's findings or does not adopt a resolution with findings explaining the reason the ordinance complies with this section and addressing the department's findings, the department shall notify the local agency and may notify the Attorney General that the local agency is in violation of state law.

(B) Before notifying the Attorney General that the local agency is in violation of state law, the department may consider whether a local agency adopted an ordinance in compliance with this section between January 1, 2017, and January 1, 2020.

(i) The department may review, adopt, amend, or repeal guidelines to implement uniform standards or criteria that supplement or clarify the terms, references, and standards set forth in this section. The guidelines adopted pursuant to this subdivision are not subject to Chapter 3.5 (commencing with Section 11340) of Part 1 of Division 3 of Title 2.

(j) As used in this section, the following terms mean:

(1) "Accessory dwelling unit" means an attached or a detached residential dwelling unit that provides complete independent living facilities for one or more persons and is located on a lot with a proposed or existing primary residence. It shall include permanent provisions for living, sleeping, eating, cooking, and sanitation on the same parcel as the single-family or multifamily dwelling is or will be situated. An accessory dwelling unit also includes the following:

(A) An efficiency unit.

(B) A manufactured home, as defined in Section 18007 of the Health and Safety Code.

(2) "Accessory structure" means a structure that is accessory and incidental to a dwelling located

on the same lot.

(3) "Efficiency unit" has the same meaning as defined in Section 17958.1 of the Health and Safety Code.

(4) "Living area" means the interior habitable area of a dwelling unit, including basements and attics, but does not include a garage or any accessory structure.

(5) "Local agency" means a city, county, or city and county, whether general law or chartered.

(6) "Nonconforming zoning condition" means a physical improvement on a property that does not conform with current zoning standards.

(7) "Passageway" means a pathway that is unobstructed clear to the sky and extends from a street to one entrance of the accessory dwelling unit.

(8) "Proposed dwelling" means a dwelling that is the subject of a permit application and that meets the requirements for permitting.

(9) "Public transit" means a location, including, but not limited to, a bus stop or train station, where the public may access buses, trains, subways, and other forms of transportation that charge set fares, run on fixed routes, and are available to the public.

(10) "Tandem parking" means that two or more automobiles are parked on a driveway or in any other location on a lot, lined up behind one another.

(k) A local agency shall not issue a certificate of occupancy for an accessory dwelling unit before the local agency issues a certificate of occupancy for the primary dwelling.

(l) Nothing in this section shall be construed to supersede or in any way alter or lessen the effect or application of the California Coastal Act of 1976 (Division 20 (commencing with Section 30000) of the Public Resources Code), except that the local government shall not be required to hold public hearings for coastal development permit applications for accessory dwelling units.

(m) A local agency may count an accessory dwelling unit for purposes of identifying adequate sites for housing, as specified in subdivision (a) of Section 65583.1, subject to authorization by the department and compliance with this division.

(n) In enforcing building standards pursuant to Article 1 (commencing with Section 17960) of Chapter 5 of Part 1.5 of Division 13 of the Health and Safety Code for an accessory dwelling unit described in paragraph (1) or (2) below, a local agency, upon request of an owner of an accessory dwelling unit for a delay in enforcement, shall delay enforcement of a building standard, subject to compliance with Section 17980.12 of the Health and Safety Code:

(1) The accessory dwelling unit was built before January 1, 2020.

(2) The accessory dwelling unit was built on or after January 1, 2020, in a local jurisdiction that, at the time the accessory dwelling unit was built, had a noncompliant accessory dwelling unit ordinance, but the ordinance is compliant at the time the request is made.

(o) This section shall ~~remain in effect only until January 1, 2025, and as of that date is repealed.~~
become operative on January 1, 2025.

**GOV. CODE: TITLE 7, DIVISION 1, CHAPTER 4,
ARTICLE 2
AB 345 (Accessory Dwelling Units)**

Effective January 1, 2022, Section 65852.26 is amended to read:

65852.26.

(a) Notwithstanding clause (i) of subparagraph (D) of paragraph (1) of subdivision (a) of Section 65852.2, a local agency ~~may, by ordinance,~~ *shall* allow an accessory dwelling unit to be sold or conveyed separately from the primary residence to a qualified buyer if all of the following apply:

- (1) The ~~property~~ *accessory dwelling unit or the primary dwelling* was built or developed by a qualified nonprofit corporation.
- (2) There is an enforceable restriction on the use of the land pursuant to a recorded contract between the qualified buyer and the qualified nonprofit corporation that satisfies all of the requirements specified in paragraph (10) of subdivision (a) of Section 402.1 of the Revenue and Taxation Code.
- (3) The property is held pursuant to a recorded tenancy in common agreement that includes all of the following:
 - (A) The agreement allocates to each qualified buyer an undivided, unequal interest in the property based on the size of the dwelling each *that* qualified buyer occupies.
 - (B) A repurchase option that requires the qualified buyer to first offer the qualified nonprofit corporation to buy the ~~property~~ *accessory dwelling unit or primary dwelling* if the buyer desires to sell or convey the property.
 - (C) A requirement that the qualified buyer occupy the ~~property~~ *accessory dwelling unit or primary dwelling* as the buyer's principal residence.
 - (D) Affordability restrictions on the sale and conveyance of the ~~property~~ *accessory dwelling unit or primary dwelling* that ensure the ~~property~~ *accessory dwelling unit and primary dwelling* will be preserved for low-income housing for 45 years for owner-occupied housing units and will be sold or resold to a qualified buyer.
 - (E) *If the tenancy in common agreement is recorded after December 31, 2021, it shall also include all of the following*
 - (i) *Delineation of all areas of the property that are for the exclusive use of a cotenant. Each cotenant shall agree not to claim a right of occupancy to an area delineated for the exclusive use of another cotenant, provided that the latter cotenant's obligations to each of the other cotenants have been satisfied.*
 - (ii) *Delineation of each cotenant's responsibility for the costs of taxes, insurance, utilities, general maintenance and repair, improvements, and any other costs, obligations, or liabilities associated with the property. This delineation shall only be binding on the parties to the agreement, and shall not supersede or obviate the liability, whether joint and several or otherwise, of the parties for any cost, obligation, or liability associated with the property where such liability is otherwise established by law or by agreement with a third party.*

(iii) Procedures for dispute resolution among the parties before resorting to legal action.

(4) A grant deed naming the grantor, grantee, and describing the property interests being transferred shall be recorded in the county in which the property is located. A Preliminary Change of Ownership Report shall be filed concurrently with this grant deed pursuant to Section 480.3 of the Revenue and Taxation Code.

(5) Notwithstanding subparagraph (A) of paragraph (2) of subdivision (f) of Section 65852.2, if requested by a utility providing service to the primary residence, the accessory dwelling unit has a separate water, sewer, or electrical connection to that utility.

(b) For purposes of this section, the following definitions apply:

(1) "Qualified buyer" means persons and families of low or moderate income, as that term is defined in Section 50093 of the Health and Safety Code.

(2) "Qualified nonprofit corporation" means a nonprofit corporation organized pursuant to Section 501(c)(3) of the Internal Revenue Code that has received a welfare exemption under Section 214.15 of the Revenue and Taxation Code for properties intended to be sold to low-income families who participate in a special no-interest loan program.

Effective January 1, 2021, Section 4740 of the Civil Code is amended to read (changes noted in ~~strikeout~~, underline/*italics*) (AB 3182 (Ting)):

4740.

(a) An owner of a separate interest in a common interest development shall not be subject to a provision in a governing document or an amendment to a governing document that prohibits the rental or leasing of any of the separate interests in that common interest development to a renter, lessee, or tenant unless that governing document, or amendment thereto, was effective prior to the date the owner acquired title to ~~his or her~~ their separate interest.

~~(b) Notwithstanding the provisions of this section, an owner of a separate interest in a common interest development may expressly consent to be subject to a governing document or an amendment to a governing document that prohibits the rental or leasing of any of the separate interests in the common interest development to a renter, lessee, or tenant.~~

(c) ~~(b)~~ For purposes of this section, the right to rent or lease the separate interest of an owner shall not be deemed to have terminated if the transfer by the owner of all or part of the separate interest meets at least one of the following conditions:

(1) Pursuant to Section 62 or 480.3 of the Revenue and Taxation Code, the transfer is exempt, for purposes of reassessment by the county tax assessor.

(2) Pursuant to subdivision (b) of, solely with respect to probate transfers, or subdivision (e), (f), or (g) of, Section 1102.2, the transfer is exempt from the requirements to prepare and deliver a Real Estate Transfer Disclosure Statement, as set forth in Section 1102.6.

~~(d)~~ ~~(c)~~ Prior to renting or leasing ~~his or her~~ their separate interest as provided by this section, an owner shall provide the association verification of the date the owner acquired title to the separate interest and the name and contact information of the prospective tenant or lessee or the prospective tenant's or lessee's representative.

~~(e)~~ ~~(d)~~ Nothing in this section shall be deemed to revise, alter, or otherwise affect the voting process by which a common interest development adopts or amends its governing documents.

~~(f) This section shall apply only to a provision in a governing document or a provision in an amendment to a governing document that becomes effective on or after January 1, 2012.~~

Effective January 1, 2021 of the Section 4741 was added to the Civil Code, to read:

4741.

(a) An owner of a separate interest in a common interest development shall not be subject to a provision in a governing document or an amendment to a governing document that prohibits, has the effect of prohibiting, or unreasonably restricts the rental or leasing of any of the separate interests, accessory dwelling units, or junior accessory dwelling units in that common interest development to a renter, lessee, or tenant.

(b) A common interest development shall not adopt or enforce a provision in a governing document or amendment to a governing document that restricts the rental or lease of separate interests within a common interest to less than 25 percent of the separate interests. Nothing in this subdivision prohibits a common interest development from adopting or enforcing a provision authorizing a higher percentage of separate interests to be rented or leased. (c) This section does not prohibit a common interest development from adopting and enforcing a provision in a governing document that prohibits transient or short-term rental of a separate property interest for a period of 30 days or less.

(d) For purposes of this section, an accessory dwelling unit or junior accessory dwelling unit shall not be construed as a separate interest.

(e) For purposes of this section, a separate interest shall not be counted as occupied by a renter if the separate interest, or the accessory dwelling unit or junior accessory dwelling unit of the separate interest, is occupied by the owner.

(f) A common interest development shall comply with the prohibition on rental restrictions specified in this section on and after January 1, 2021, regardless of whether the common interest development has revised their governing documents to comply with this section. However, a common interest development shall amend their governing documents to conform to the requirements of this section no later than December 31, 2021.

(g) A common interest development that willfully violates this section shall be liable to the applicant or other party for actual damages, and shall pay a civil penalty to the applicant or other party in an amount not to exceed one thousand dollars (\$1,000).

(h) In accordance with Section 4740, this section does not change the right of an owner of a separate interest who acquired title to their separate interest before the effective date of this section to rent or lease their property.

Effective January 1, 2020, Section 65852.22 of the Government Code was amended to read:

65852.22.

(a) Notwithstanding Section 65852.2, a local agency may, by ordinance, provide for the creation of junior accessory dwelling units in single-family residential zones. The ordinance may require a permit to be obtained for the creation of a junior accessory dwelling unit, and shall do all of the following:

- (1) Limit the number of junior accessory dwelling units to one per residential lot zoned for single-family residences with a single-family residence built, or proposed to be built, on the lot.
- (2) Require owner-occupancy in the single-family residence in which the junior accessory dwelling unit will be permitted. The owner may reside in either the remaining portion of the

structure or the newly created junior accessory dwelling unit. Owner-occupancy shall not be required if the owner is another governmental agency, landtrust, or housing organization.

(3) Require the recordation of a deed restriction, which shall run with the land, shall be filed with the permitting agency, and shall include both of the following:

(A) A prohibition on the sale of the junior accessory dwelling unit separate from the sale of the single-family residence, including a statement that the deed restriction may be enforced against future purchasers.

(B) A restriction on the size and attributes of the junior accessory dwelling unit that conforms with this section.

(4) Require a permitted junior accessory dwelling unit to be constructed within the walls of proposed or existing single-family residence.

(5) Require a permitted junior accessory dwelling to include a separate entrance from the main entrance to the proposed or existing single-family residence.

(6) Require the permitted junior accessory dwelling unit to include an efficiency kitchen, which shall include all of the following:

(A) A cooking facility with appliances.

(B) A food preparation counter and storage cabinets that are of reasonable size in relation to the size of the junior accessory dwelling unit.

(b)(1) An ordinance shall not require additional parking as a condition to grant a permit.

(2) This subdivision shall not be interpreted to prohibit the requirement of an inspection, including the imposition of a fee for that inspection, to determine if the junior accessory dwelling unit complies with applicable building standards.

(c) An application for a permit pursuant to this section shall, notwithstanding Section 65901 or 65906 or any local ordinance regulating the issuance of variances or special use permits, be considered ministerially, without discretionary review or a hearing. The permitting agency shall act on the application to create a junior accessory dwelling unit within 60 days from the date the local agency receives a completed application if there is an existing single-family dwelling on the lot. If the permit application to create a junior accessory dwelling unit is submitted with a permit application to create a new single-family dwelling on the lot, the permitting agency may delay acting on the permit application for the junior accessory dwelling unit until the permitting agency acts on the permit application to create the new single-family dwelling, but the application to create the junior accessory dwelling unit shall still be considered ministerially without discretionary review or a hearing. If the applicant requests a delay, the 60-day time period shall be tolled for the period of the delay. A local agency may charge a fee to reimburse the local agency for costs incurred in connection with the issuance of a permit pursuant to this section.

(d) For purposes of any fire or life protection ordinance or regulation, a junior accessory dwelling unit shall not be considered a separate or new dwelling unit. This section shall not be construed to prohibit a city, county, city and county, or other local public entity from adopting an ordinance or regulation relating to fire and life protection requirements within a single-family residence that contains a junior accessory dwelling unit so long as the ordinance or regulation applies uniformly to all single-family residences within the zone regardless of whether the single-family residence includes a junior accessory dwelling unit or not.

(e) For purposes of providing service for water, sewer, or power, including a connection fee, a junior accessory dwelling unit shall not be considered a separate or new dwelling unit.

(f) This section shall not be construed to prohibit a local agency from adopting an ordinance or regulation, related to parking or a service or a connection fee for water, sewer, or power, that applies to a single-family residence that contains a junior accessory dwelling unit, so long as

that ordinance or regulation applies uniformly to all single-family residences regardless of whether the single-family residence includes a junior accessory dwelling unit.

(g) If a local agency has not adopted a local ordinance pursuant to this section, the local agency shall ministerially approve a permit to construct a junior accessory dwelling unit that satisfies the requirements set forth in subparagraph (A) of paragraph (1) of subdivision (e) of Section 65852.2 and the requirements of this section.

(h) For purposes of this section, the following terms have the following meanings:

(1) "Junior accessory dwelling unit" means a unit that is no more than 500 square feet in size and contained entirely within a single-family residence. A junior accessory dwelling unit may include separate sanitation facilities, or may share sanitation facilities with the existing structure.

(2) "Local agency" means a city, county, or city and county, whether general law or chartered.

Effective January 1, 2020 Section 17980.12 was added to the Health and Safety Code, immediately following Section 17980.11, to read:

17980.12.

(a)(1) An enforcement agency, until January 1, 2030, that issues to an owner of an accessory dwelling unit described in subparagraph (A) or (B) below, a notice to correct a violation of any provision of any building standard pursuant to this part shall include in that notice a statement that the owner of the unit has a right to request a delay in enforcement pursuant to this subdivision:

(A) The accessory dwelling unit was built before January 1, 2020.

(B) The accessory dwelling unit was built on or after January 1, 2020, in a local jurisdiction that, at the time the accessory dwelling unit was built, had a noncompliant accessory dwelling unit ordinance, but the ordinance is compliant at the time the request is made.

(2) The owner of an accessory dwelling unit that receives a notice to correct violations or abate nuisances as described in paragraph (1) may, in the form and manner prescribed by the enforcement agency, submit an application to the enforcement agency requesting that enforcement of the violation be delayed for five years on the basis that correcting the violation is not necessary to protect health and safety.

(3) The enforcement agency shall grant an application described in paragraph (2) if the enforcement agency determines that correcting the violation is not necessary to protect health and safety. In making this determination, the enforcement agency shall consult with the entity responsible for enforcement of building standards and other regulations of the State Fire Marshal pursuant to Section 13146.

(4) The enforcement agency shall not approve any applications pursuant to this section on or after January 1, 2030. However, any delay that was approved by the enforcement agency before January 1, 2030, shall be valid for the full term of the delay that was approved at the time of the initial approval of the application pursuant to paragraph (3).

(b) For purposes of this section, "accessory dwelling unit" has the same meaning as defined in Section 65852.2.

(c) This section shall remain in effect only until January 1, 2035, and as of that date is repealed.

**CIVIL CODE: DIVISION 4, PART 5, CHAPTER 5,
ARTICLE 1
AB 670 Accessory Dwelling Units**

Effective January 1, 2020, Section 4751 was added to the Civil Code, to read (AB 670 (Friedman)):

4751.

(a) Any covenant, restriction, or condition contained in any deed, contract, security instrument, or other instrument affecting the transfer or sale of any interest in a planned development, and any provision of a governing document, that either effectively prohibits or unreasonably restricts the construction or use of an accessory dwelling unit or junior accessory dwelling unit on a lot zoned for single-family residential use that meets the requirements of Section 65852.2 or 65852.22 of the Government Code, is void and unenforceable.

(b) This section does not apply to provisions that impose reasonable restrictions on accessory dwelling units or junior accessory dwelling units. For purposes of this subdivision, "reasonable restrictions" means restrictions that do not unreasonably increase the cost to construct, effectively prohibit the construction of, or extinguish the ability to otherwise construct, an accessory dwelling unit or junior accessory dwelling unit consistent with the provisions of Section 65852.2 or 65852.22 of the Government Code.

**GOV. CODE: TITLE 7, DIVISION 1, CHAPTER 3,
ARTICLE 10.6
AB 671 Accessory Dwelling Units**

Effective January 1, 2020, Section 65583(c)(7) of the Government Code was added to read (sections of housing element law omitted for conciseness) (AB 671 (Friedman)):

65583(c)(7).

Develop a plan that incentivizes and promotes the creation of accessory dwelling units that can be offered at affordable rent, as defined in Section 50053 of the Health and Safety Code, for very low, low-, or moderate-income households. For purposes of this paragraph, "accessory dwelling units" has the same meaning as "accessory dwelling unit" as defined in paragraph (4) of subdivision (i) of Section 65852.2.

Effective January 1, 2020, Section 50504.5 was added to the Health and Safety Code, to read (AB 671 (Friedman)):

50504.5.

(a) The department shall develop by December 31, 2020, a list of existing state grants and financial incentives for operating, administrative, and other expenses in connection with the planning, construction, and operation of an accessory dwelling unit with affordable rent, as defined in Section 50053, for very low, low-, and moderate-income households.

(b) The list shall be posted on the department's internet website by December 31, 2020.

(c) For purposes of this section, "accessory dwelling unit" has the same meaning as defined in paragraph (4) of subdivision (i) of Section 65852.2 of the Government Code.

**GOV. CODE: TITLE 7, DIVISION 1, CHAPTER 4, ARTICLE 2 & TITLE 7, DIVISION 2,
CHAPTER 1, ARTICLE 1
SB 9 Housing development: approvals**

Effective January 1, 2022, Section 65852.21 was added to the Government Code, to read:

65852.21. (a) A proposed housing development containing no more than two residential units within a single-family residential zone shall be considered ministerially, without discretionary review or a hearing, if the proposed housing development meets all of the following requirements:

(1) The parcel subject to the proposed housing development is located within a city, the boundaries of which include some portion of either an urbanized area or urban cluster, as designated by the United States Census Bureau, or, for unincorporated areas, a legal parcel wholly within the boundaries of an urbanized area or urban cluster, as designated by the United States Census Bureau.

(2) The parcel satisfies the requirements specified in subparagraphs (B) to (K), inclusive, of paragraph (6) of subdivision (a) of Section 65913.4.

(3) Notwithstanding any provision of this section or any local law, the proposed housing development would not require demolition or alteration of any of the following types of housing:

(A) Housing that is subject to a recorded covenant, ordinance, or law that restricts rents to levels affordable to persons and families of moderate, low, or very low income.

(B) Housing that is subject to any form of rent or price control through a public entity's valid exercise of its police power.

(C) Housing that has been occupied by a tenant in the last three years.

(4) The parcel subject to the proposed housing development is not a parcel on which an owner of residential real property has exercised the owner's rights under Chapter 12.75 (commencing with Section 7060) of Division 7 of Title 1 to withdraw accommodations from rent or lease within 15 years before the date that the development proponent submits an application. 94 — 3 — Ch. 162

(5) The proposed housing development does not allow the demolition of more than 25 percent of the existing exterior structural walls, unless the housing development meets at least one of the following conditions:

(A) If a local ordinance so allows.

(B) The site has not been occupied by a tenant in the last three years.

(6) The development is not located within a historic district or property included on the State Historic Resources Inventory, as defined in Section 5020.1 of the Public Resources Code, or within a site that is designated or listed as a city or county landmark or historic property or district pursuant to a city or county ordinance.

(b)(1) Notwithstanding any local law and except as provided in paragraph (2), a local agency may impose objective zoning standards, objective subdivision standards, and objective design review standards that do not conflict with this section.

(2)(A) The local agency shall not impose objective zoning standards, objective subdivision standards, and objective design standards that would have the effect of physically precluding the construction of up to two units or that would physically preclude either of the two units from being at least 800 square feet in floor area. (B)(i) Notwithstanding subparagraph (A), no setback shall be required for an existing structure or a structure constructed in the same location and to the same dimensions as an existing structure.

(ii) Notwithstanding subparagraph (A), in all other circumstances not described in clause (i), a local agency may require a setback of up to four feet from the side and rear lot lines.

(c) In addition to any conditions established in accordance with subdivision (b), a local agency may require any of the following conditions when considering an application for two residential units as provided for in this section:

(1) Off-street parking of up to one space per unit, except that a local agency shall not impose parking requirements in either of the following instances:

(A) The parcel is located within one-half mile walking distance of either a high-quality transit corridor, as defined in subdivision (b) of Section 21155 of the Public Resources Code, or a major transit stop, as defined in Section 21064.3 of the Public Resources Code.

(B) There is a car share vehicle located within one block of the parcel. (2) For residential units connected to an onsite wastewater treatment system, a percolation test completed within the last 5 years, or, if the percolation test has been recertified, within the last 10 years.

(d) Notwithstanding subdivision (a), a local agency may deny a proposed housing development project if the building official makes a written finding, based upon a preponderance of the evidence, that the proposed housing development project would have a specific, adverse impact, as defined and determined in paragraph (2) of subdivision (d) of Section 65589.5, upon public health and safety or the physical environment and for which there is 94 Ch. 162 — 4 — no feasible method to satisfactorily mitigate or avoid the specific, adverse impact.

(e) A local agency shall require that a rental of any unit created pursuant to this section be for a term longer than 30 days.

(f) Notwithstanding Section 65852.2 or 65852.22, a local agency shall not be required to permit an accessory dwelling unit or a junior accessory dwelling unit on parcels that use both the authority contained within this section and the authority contained in Section 66411.7.

(g) Notwithstanding subparagraph (B) of paragraph (2) of subdivision (b), an application shall not be rejected solely because it proposes adjacent or connected structures provided that the structures meet building code safety standards and are sufficient to allow separate conveyance.

(h) Local agencies shall include units constructed pursuant to this section in the annual housing element report as required by subparagraph (l) of paragraph (2) of subdivision (a) of Section 65400.

(i) For purposes of this section, all of the following apply:

(1) A housing development contains two residential units if the development proposes no more than two new units or if it proposes to add one new unit to one existing unit.

(2) The terms “objective zoning standards,” “objective subdivision standards,” and “objective design review standards” mean standards that involve no personal or subjective judgment by a public official and are uniformly verifiable by both the development applicant or proponent and the public official prior to submittal. These standards may be embodied in alternative objective land use specifications adopted by a local agency, and may include, but are not limited to, housing overlay zones, specific plans, inclusionary zoning ordinances, and density bonus ordinances.

(3) “Local agency” means a city, county, or city and county, whether general law or chartered.

(j) A local agency may adopt an ordinance to implement the provisions of this section. An ordinance adopted to implement this section shall not be considered a project under Division 13 (commencing with Section 21000) of the Public Resources Code.

(k) Nothing in this section shall be construed to supersede or in any way alter or lessen the effect or application of the California Coastal Act of 1976 (Division 20 (commencing with Section 30000) of the Public Resources Code), except that the local agency shall not be required to hold public hearings for coastal development permit applications for a housing development pursuant to this section.

Section 66411.7 is added to the Government Code, to read:

66411.7. (a) Notwithstanding any other provision of this division and any local law, a local agency shall ministerially approve, as set forth in this section, a parcel map for an urban lot split only if the local agency determines that the parcel map for the urban lot split meets all the following requirements:

(1) The parcel map subdivides an existing parcel to create no more than two new parcels of approximately equal lot area provided that one parcel shall not be smaller than 40 percent of the lot area of the original parcel proposed for subdivision.

(2) (A) Except as provided in subparagraph (B), both newly created parcels are no smaller than 1,200 square feet. (B) A local agency may by ordinance adopt a smaller minimum lot size subject to ministerial approval under this subdivision.

(3) The parcel being subdivided meets all the following requirements:

(A) The parcel is located within a single-family residential zone.

(B) The parcel subject to the proposed urban lot split is located within a city, the boundaries of which include some portion of either an urbanized area or urban cluster, as designated by the United States Census Bureau, or, for unincorporated areas, a legal parcel wholly within the boundaries of an urbanized area or urban cluster, as designated by the United States Census Bureau.

(C) The parcel satisfies the requirements specified in subparagraphs (B) to (K), inclusive, of paragraph (6) of subdivision (a) of Section 65913.4.

(D) The proposed urban lot split would not require demolition or alteration of any of the following types of housing: (i) Housing that is subject to a recorded covenant, ordinance, or law that restricts rents to levels affordable to persons and families of moderate, low, or very low income.

(ii) Housing that is subject to any form of rent or price control through a public entity's valid exercise of its police power. (iii) A parcel or parcels on which an owner of residential real property has exercised the owner's rights under Chapter 12.75 (commencing with Section 7060) of Division 7 of Title 1 to withdraw accommodations from rent or lease within 15 years before the date that the development proponent submits an application.

(iv) Housing that has been occupied by a tenant in the last three years.

(E) The parcel is not located within a historic district or property included on the State Historic Resources Inventory, as defined in Section 5020.1 of the Public Resources Code, or within a site that is designated or listed as a city or county landmark or historic property or district pursuant to a city or county ordinance.

(F) The parcel has not been established through prior exercise of an urban lot split as provided for in this section. (G) Neither the owner of the parcel being subdivided nor any person acting in concert with the owner has previously subdivided an adjacent parcel using an urban lot split as provided for in this section.

(b) An application for a parcel map for an urban lot split shall be approved in accordance with the following requirements:

(1) A local agency shall approve or deny an application for a parcel map for an urban lot split ministerially without discretionary review.

(2) A local agency shall approve an urban lot split only if it conforms to all applicable objective requirements of the Subdivision Map Act (Division 2 (commencing with Section 66410)), except as otherwise expressly provided in this section.

(3) Notwithstanding Section 66411.1, a local agency shall not impose regulations that require dedications of rights-of-way or the construction of offsite improvements for the parcels being created as a condition of issuing a parcel map for an urban lot split pursuant to this section.

(c) (1) Except as provided in paragraph (2), notwithstanding any local law, a local agency may impose objective zoning standards, objective subdivision standards, and objective design review standards applicable to a parcel created by an urban lot split that do not conflict with this section.

(2) A local agency shall not impose objective zoning standards, objective subdivision standards, and objective design review standards that would have the effect of physically precluding the construction of two units on either of the resulting parcels or that would result in a unit size of less than 800 square feet.

(3) (A) Notwithstanding paragraph (2), no setback shall be required for an existing structure or a structure constructed in the same location and to the same dimensions as an existing structure.

(B) Notwithstanding paragraph (2), in all other circumstances not described in subparagraph (A), a local agency may require a setback of up to four feet from the side and rear lot lines.

(d) Notwithstanding subdivision (a), a local agency may deny an urban lot split if the building official makes a written finding, based upon a preponderance of the evidence, that the proposed housing development project would have a specific, adverse impact, as defined and determined in paragraph (2) of subdivision (d) of Section 65589.5, upon public health and safety or the physical environment and for which there is no feasible method to satisfactorily mitigate or avoid the specific, adverse impact.

(e) In addition to any conditions established in accordance with this section, a local agency may require any of the following conditions when considering an application for a parcel map for an urban lot split:

(1) Easements required for the provision of public services and facilities.

(2) A requirement that the parcels have access to, provide access to, or adjoin the public right-of-way.

(3) Off-street parking of up to one space per unit, except that a local agency shall not impose parking requirements in either of the following instances:

(A) The parcel is located within one-half mile walking distance of either a high-quality transit corridor as defined in subdivision (b) of Section 21155 of the Public Resources Code, or a major transit stop as defined in Section 21064.3 of the Public Resources Code.

(B) There is a car share vehicle located within one block of the parcel.

(f) A local agency shall require that the uses allowed on a lot created by this section be limited to residential uses.

(g) (1) A local agency shall require an applicant for an urban lot split to sign an affidavit stating that the applicant intends to occupy one of the housing units as their principal residence for a minimum of three years from the date of the approval of the urban lot split.

(2) This subdivision shall not apply to an applicant that is a “community land trust,” as defined in clause (ii) of subparagraph (C) of paragraph (11) of subdivision (a) of Section 402.1 of the Revenue and Taxation Code, or is a “qualified nonprofit corporation” as described in Section 214.15 of the Revenue and Taxation Code.

(3) A local agency shall not impose additional owner occupancy standards, other than provided for in this subdivision, on an urban lot split pursuant to this section.

(h) A local agency shall require that a rental of any unit created pursuant to this section be for a term longer than 30 days.

(i) A local agency shall not require, as a condition for ministerial approval of a parcel map application for the creation of an urban lot split, the correction of nonconforming zoning conditions.

(j) (1) Notwithstanding any provision of Section 65852.2, 65852.21, 65852.22, 65915, or this section, a local agency shall not be required to permit more than two units on a parcel created through the exercise of the authority contained within this section.

(2) For the purposes of this section, “unit” means any dwelling unit, including, but not limited to, a unit or units created pursuant to Section 65852.21, a primary dwelling, an accessory dwelling unit as defined in Section 65852.2, or a junior accessory dwelling unit as defined in Section 65852.22.

(k) Notwithstanding paragraph (3) of subdivision (c), an application shall not be rejected solely because it proposes adjacent or connected structures provided that the structures meet building code safety standards and are sufficient to allow separate conveyance.

(l) Local agencies shall include the number of applications for parcel maps for urban lot splits pursuant to this section in the annual housing element report as required by subparagraph (l) of paragraph (2) of subdivision (a) of Section 65400.

(m) For purposes of this section, both of the following shall apply:

(1) "Objective zoning standards," "objective subdivision standards," and "objective design review standards" mean standards that involve no personal or subjective judgment by a public official and are uniformly verifiable by reference to an external and uniform benchmark or criterion available and knowable by both the development applicant or proponent and the public official prior to submittal. These standards may be embodied in alternative objective land use specifications adopted by a local agency, and may include, but are not limited to, housing overlay zones, specific plans, inclusionary zoning ordinances, and density bonus ordinances.

(2) "Local agency" means a city, county, or city and county, whether general law or chartered.

(n) A local agency may adopt an ordinance to implement the provisions of this section. An ordinance adopted to implement this section shall not be considered a project under Division 13 (commencing with Section 21000) of the Public Resources Code.

(o) Nothing in this section shall be construed to supersede or in any way alter or lessen the effect or application of the California Coastal Act of 1976 (Division 20 (commencing with Section 30000) of the Public Resources Code), except that the local agency shall not be required to hold public hearings for coastal development permit applications for urban lot splits pursuant to this section.

Attachment 2: ADU Resources

[ACCESSORY DWELLING UNITS: CASE STUDY](#)

By the United States Department of Housing and Urban Development, Office of Policy Development and Research. (2008)

Introduction: Accessory dwelling units (ADUs) — also referred to as accessory apartments, ADUs, or granny flats— are additional living quarters on single-family lots that are independent of the primary dwelling unit. The separate living spaces are equipped with kitchen and bathroom facilities and can be either attached or detached from the main residence. This case study explores how the adoption of ordinances, with reduced regulatory restrictions to encourage ADUs, can be advantageous for communities. Following an explanation of the various types of ADUs and their benefits, this case study provides examples of municipalities with successful ADU legislation and programs. Section titles include: History of ADUs; Types of Accessory Dwelling Units; Benefits of Accessory Dwelling Units; and Examples of ADU Ordinances and Programs.

[ADU UPDATE: EARLY LESSONS AND IMPACTS OF CALIFORNIA'S STATE AND LOCAL POLICY CHANGES](#)

By David Garcia (2017)

Terner Center for Housing and Innovation, UC Berkeley

As California's housing crisis deepens, innovative strategies for creating new housing units for all income levels are needed. One such strategy is building Accessory Dwelling Units (ADUs) by private homeowners. While large scale construction of new market rate and affordable homes is needed to alleviate demand-driven rent increases and displacement pressures, ADUs present a unique opportunity for individual homeowners to create more housing as well. In particular, ADUs can increase the supply of housing in areas where there are fewer opportunities for larger-scale developments, such as neighborhoods that are predominantly zoned for and occupied by single-family homes.

In two of California's major metropolitan areas -- Los Angeles and San Francisco -- well over three quarters of the total land area is comprised of neighborhoods where single-family homes make up at least 60 percent of the community's housing stock. Across the state, single-family detached units make up 56.4 percent of the overall housing stock. Given their prevalence in the state's residential land use patterns, increasing the number of single-family homes that have an ADU could contribute meaningfully to California's housing shortage.

[ACCESSORY DWELLING UNITS AS LOW-INCOME HOUSING: CALIFORNIA' FAUSTIAN BARGAIN](#)

By Darrel Ramsey-Musolf (2018)

University of Massachusetts Amherst, ScholarWorks@UMass Amherst

In 2003, California allowed cities to count accessory dwelling units (ADU) towards low-income housing needs. Unless a city's zoning code regulates the ADU's maximum rent, occupancy income, and/or effective period, then the city may be unable to enforce low-income occupancy. After examining a stratified random sample of 57 low-, moderate-, and high-income cities, the high-income cities must proportionately accommodate more low-income needs than low-income cities. By contrast, low-income cities must quantitatively accommodate three times the low-income needs of high-income cities. The sample counted 750 potential ADUs as low-income housing. Even though 759 were constructed, no units were identified as available low-income housing. In addition, none of the cities' zoning codes enforced low-income occupancy. Inferential tests determined that cities with colleges and high incomes were more probable to count ADUs towards overall and low-income housing needs. Furthermore, a city's count of potential ADUs and cities with high proportions of renters maintained positive associations with ADU production, whereas a city's density and prior compliance with state housing laws maintained negative associations. In summary, ADUs did increase local housing inventory and potential ADUs were positively associated with ADU production, but ADUs as low-income housing remained a paper calculation.

[IMPLEMENTING THE BACKYARD REVOLUTION: PERSPECTIVES OF CALIFORNIA'S ADU OWNERS \(2022\)](#)

By Karen Chapple, Dori Ganetsos, and Emmanuel Lopez (2022)
UC Berkeley Center for Community Innovation

The report presents the findings from the first-ever statewide ADU owner survey in California.

[JUMPSTARTING THE MARKET FOR ACCESSORY DWELLING UNITS: LESSONS LEARNED FROM PORTLAND, SEATTLE AND VANCOUVER](#)

By Karen Chapple et al (2017)
Terner Center for Housing and Innovation, UC Berkeley

Despite government attempts to reduce barriers, a widespread surge of ADU construction has not materialized. The ADU market remains stalled. To find out why, this study looks at three cities in the Pacific Northwest of the United States and Canada that have seen a spike in construction in recent years: Portland, Seattle, and Vancouver. Each city has adopted a set of zoning reforms, sometimes in combination with financial incentives and outreach programs, to spur ADU construction. Due to these changes, as well as the acceleration of the housing crisis in each city, ADUs have begun blossoming.

[THE MACRO VIEW ON MICRO UNITS](#)

By Bill Whitlow, et al. – Urban Land Institute
(2014)Library Call #: H43 4.21 M33 2014

The Urban Land Institute Multifamily Housing Councils were awarded a ULI Foundation research grant in fall 2013 to evaluate from multiple perspectives the market performance and market acceptance of micro and small units.

[REACHING CALIFORNIA'S ADU POTENTIAL: PROGRESS TO DATE AND THE NEED FOR ADU FINANCE](#)

Karen Chapple, et al. – Turner Center (2020)

To build upon the early success of ADU legislation, the study argues that more financial tools are needed to facilitate greater ADU development amongst low to moderate income homeowners who do not have access to cash saving and cannot leverage home equity. The study recommends that the federal government create ADU-specific construction lending programs. In addition, California could lead this effort by creating a program to assist homeowners in qualifying for ADU construction loans.

[RETHINKING PRIVATE ACCESSORY DWELLINGS](#)

By William P. Macht. Urbanland online. (March 6, 2015)

Library Location: Urbanland 74 (1/2) January/February 2015, pp. 87-91.

One of the large impacts of single-use, single-family detached zoning has been to severely shrink the supply of accessory dwellings, which often were created in or near primary houses. Detached single-family dwelling zones—the largest housing zoning category—typically preclude more than one dwelling per lot except under stringent regulation, and then only in some jurisdictions. Bureaucratically termed “accessory dwelling units” that are allowed by some jurisdictions may encompass market-derived names such as granny flats, granny cottages, mother-in-law suites, secondary suites, backyard cottages, casitas, carriage flats, sidekick houses, basement apartments, attic apartments, laneway houses, multigenerational homes, or home-within-a-home.

[REGULATION ADUS IN CALIFORNIA: LOCAL APPROACHES & OUTCOMES](#)

By Deidra Pfeiffer (May 16, 2019)

Turner Center for Housing and Innovation, UC Berkeley

Accessory dwelling units (ADU) are often mentioned as a key strategy in solving the nation's housing problems, including housing affordability and challenges associated with aging in place. However, we know little about whether formal ADU practices—such as adopting an ordinance, establishing regulations, and permitting—contribute to these goals. This research helps to fill this gap by using data from the Turner California Residential Land Use Survey and the U.S. Census Bureau to understand the types of communities engaging in different kinds of formal ADU practices in California, and whether localities with adopted ordinances and less restrictive regulations have more frequent applications to build ADUs and increasing housing affordability and aging in place. Findings suggest that three distinct approaches to ADUs are occurring in California: 1) a more restrictive approach in disadvantaged communities of color, 2)

a moderately restrictive approach in highly advantaged, predominately White and Asian communities, and 3) a less restrictive approach in diverse and moderately advantaged communities. Communities with adopted ordinances and less restrictive regulations receive more frequent applications to build ADUs but have not yet experienced greater improvements in housing affordability and aging in place. Overall, these findings imply that 1) context-specific technical support and advocacy may be needed to help align formal ADU practices with statewide goals, and 2) ADUs should be treated as one tool among many to manage local housing problems.

[SECONDARY UNITS AND URBAN INFILL: A LITERATURE REVIEW](#)

By Jake Wegmann and Alison Nemirow (2011)
UC Berkeley: IURD
Library Call # D44 4.21 S43 2011

This literature review examines the research on both infill development in general, and secondary units in particular, with an eye towards understanding the similarities and differences between infill as it is more traditionally understood – i.e., the development or redevelopment of entire parcels of land in an already urbanized area – and the incremental type of infill that secondary unit development constitutes.

Chapter 17.52

GENERAL PROVISIONS AND EXCEPTIONS

Sections:

- 17.52.010 Effect of chapter.
- 17.52.020 Entertainment and alcoholic beverage service.
- 17.52.030 Temporary rummage sales and flea markets.
- 17.52.040 Temporary and seasonal uses and structures.
- 17.52.050 Limitations to obstructions.
- 17.52.060 Public utility uses.
- 17.52.070 Applicability to public agencies.
- 17.52.080 Propane tanks for domestic use.
- 17.52.100 Home occupations.
- 17.52.110 Airplane hangars.
- 17.52.120 Salvage of dead, dying or diseased timber.
- 17.52.130 Storage containers.
- 17.52.140 Movie sets.
- 17.52.150 Small family day care homes.
- 17.52.160 Large family day care homes.
- 17.52.170 Commercial growing and harvesting of timber.
- 17.52.180 Retail sales, indoor, retail services, indoor, or shopping centers.
- 17.52.200 Accessory Dwelling Units.
- 17.52.210 Primary caregivers.
- 17.52.220 Commercial events on agricultural land.
- 17.52.230 Music festivals.
- 17.52.240 Cottage food operations.
- 17.52.250 Mobile food vendors.
- 17.52.260 Keeping of poultry in the R-1 district.

17.52.010 Effect of chapter. The regulations set forth in this chapter shall modify or supplement the zoning district regulations appearing elsewhere in this title. (Ord. 1229 § 2 (part), 1982).

17.52.020 Entertainment and alcoholic beverage service. No establishment where liquor, beer or wine is served, or any place where entertainment with amplified music is provided shall be permitted closer than two hundred feet to any residential (R) zoning district except as provided in this section. Service of beer and wine only when incidental to food service in a restaurant in a commercial (C), recreational (K), mixed use (MU) or business park (BP) zoning district may be allowed as a conditional use within two hundred feet of a residential (R) zoning district. Entertainment with amplified music provided at businesses in a commercial (C), recreational (K), mixed use (MU) or business park (BP) zoning district may

be allowed as a conditional use within two hundred feet of a residential (R) zoning district. (Ord. 3225 § 9, 2013; Ord. 2222 § 93, 1998; Ord. 1307 § 5, 1983; Ord. 1229 § 2 (part), 1982).

17.52.030 Temporary rummage sales and flea markets. Temporary rummage sales and flea markets may be held in any given location or sponsored by a particular person or group for not more than three days in any calendar year. (Ord. 1229 § 2 (part), 1982).

17.52.040 Temporary and seasonal uses and structures.

A. Any use listed as a permitted use or a conditional use in any zoning district and any temporary structures associated therewith may be permitted in any other district for a period not to exceed one year provided a use permit is first secured. No use permit shall be granted pursuant to this section unless the applicant for such permit guarantees removal of any such

structure or use upon expiration of the one-year period, either by posting a bond or other device acceptable to the director who will insure such removal. This section shall not apply to signs not otherwise permitted in a particular district.

B. Commercial and industrial uses which are seasonal in nature and reestablished annually may be permitted in any district for one continuous period not to exceed six months each year, provided a use permit is first secured. Once a use permit is issued it shall remain valid each year without reapplying or renewal as long as the seasonal use occurs each year, unless otherwise stated in the conditions of the permit. No use permit shall be granted pursuant to this section unless the applicant for such permit guarantees removal of the structure or Use after each period of six months or less by posting a bond or other device acceptable to the director. This section shall not apply to any use which is not considered to be seasonal in nature by the director. (Ord. 1378 § 1, 1985; Ord. 1229 (part), 1982).

17.52.050 Limitations to obstructions.

A. Cornices, eaves, canopies and similar architectural features shall not extend more than two feet into any required yard or setback area.

B. Uncovered porches, fire escapes or landings shall not extend more than four feet into any required front or rear yard or setback area, or more than three feet into any side yard or setback area.

C. On all property boundaries, the maximum height of any fence shall be six feet. This does not apply to commercial (C), business park (BP) and industrial (M) districts or parcels larger than one-third acre.

D. In no case shall any fence, hedge, sign, structure, or other visual screen be erected in such a manner as to block necessary motorist visibility and create a traffic hazard. (Ord. 2222 § 94, 1998; Ord. 1229 § 2 (part), 1982).

17.52.060 Public utility uses.

A. Except as otherwise provided in this title, public utility distribution facilities are declared to be permitted uses in all districts, except in open space (O) districts and design control (:D) and historical area (:HDP) combining districts.

B. Routes or proposed electric transmission lines shall be submitted to the planning commission for review, recommendation and

approval prior to the acquisition of rights-of-way.

C. Except as otherwise provided in this title, all public utility uses except distribution facilities, are declared to be conditional uses in all districts and are permitted subject to securing a use permit in each case. (Ord. 2506 § 14, 2003; Ord. 1229 § 2 (part), 1982).

17.52.070 Applicability to public agencies. The provisions of this title, to the extent permitted by law, shall apply to all public bodies, districts and agencies, including federal, state, county, municipal and local (other than the County of Tuolumne); provided, however, that use permits, variances and zone changes may be applied for and granted to such governmental units without payment of the required application fee. (Ord. 1229 § 2 (part), 1982).

17.52.080 Propane tanks for domestic use.

Storage tanks for liquid petroleum gas for domestic use are permitted in all districts. (Ord. 1229 § 2 (part), 1982).

17.52.100 Home occupations. Home occupations are permitted in all districts except when the occupation or any part of it is otherwise regulated in this code. (Ord. 2222 § 95, 1998; Ord. 1229 § 2 (part), 1982).

17.52.110 Airplane hangars.¹ The construction and utilization of aircraft hangars, parking aprons and workshops for the storage, maintenance, repair and construction of the resident's own personal aircraft are permitted accessory uses on lots with taxiway access to an airport. (Ord. 1229 § 2 (part), 1982).

17.52.120 Salvage of dead, dying or diseased timber. Notwithstanding any other provision of this title to the contrary, no use permit shall be required for the commercial salvage of dead, dying or diseased timber on parcels of three acres or more when an exemption from the timber harvesting plan requirement or an emergency notice is issued by the California Department of Forestry and Fire Protection. No use permit shall be required for the salvage of dead, dying or diseased timber on parcels of less than three acres. For the purposes of this

¹ For provisions on airport zoning, see Ch. 18.28 of this Code.

section, "dead, dying or diseased timber" means trees which are dead, dying or diseased because of lack of water, insect infestation or other factors and includes "Diseased trees" and "Dying trees" as defined in Section 895.1 of the California Code of Regulations. (Ord. 3225 § 10, 2013; Ord. 1229 § 2 (part), 1982).

17.52.130 Storage containers. Storage containers are prohibited in all zoning districts unless they conform to the following requirements:

A. In all zoning districts:

1. Any storage container, regardless of size, shall conform to all building setbacks.
2. A building permit or waiver shall be secured for any storage container over one hundred square feet.

B. In a design review district, any storage container may be installed only after first securing a design review permit in accordance with Chapter 17.46.

C. In any MU, R or RE zoning district:

1. Only one storage container, not exceeding two hundred square feet in size, is allowed on any parcel.
2. Any storage container shall be placed behind or to the side of the principal building. Said container shall be screened with fencing or landscaping so as not to be visible from any roadway or neighboring home.

D. In any C, M, BP, P, or K zoning district:

1. A landscaping plan and/or screening plan shall be reviewed and approved by the community development department prior to the installation of any storage container.
2. Only two storage containers are allowed on any parcel.

E. In any A zoning district:

1. All storage containers must be used primarily for agricultural purposes.
2. Storage containers easily visible to a neighboring home or roadway shall be screened with fencing or landscaping.

F. Existing use of any storage container in numbers greater than permitted herein are subject to the provisions of Chapter 17.58 of this title. Notwithstanding Chapter 17.58, existing uses of any storage container not conforming to the provisions of this section, other than limits on numbers of containers, shall be removed or brought into conformance with this section upon change of ownership of the parcel or within five years after the effective date of this

section, whichever comes first. (Ord. 2314 § 79, 1999; Ord. 2222 § 96, 1998; Ord. 1800 § 2, 1990).

17.52.140 Movie sets.

A. Temporary motion picture and television stage sets and scenery are permitted in all districts provided said structures are removed within ninety days of their erection.

B. Permanent motion picture and television stage sets and scenery may be permitted in any district provided a use permit is first secured. (Ord. 1738 § 1, 1990).

17.52.150 Small family day care homes. Small family day care homes are permitted uses within permitted and conditional use single-family residences in all districts, except O and O-1. (Ord. 2119 § 41, 1995)

17.52.160 Large family day care homes. Large family day care homes are permitted uses within permitted and conditional use single-family residences in all district, except O and O-1, provided all of the following criteria are met at all times during the use:

A. There is only one large family day care home on each parcel.

B. Two off-street parking spaces are provided for the single-family residence and one-half parking space for each employee who does not reside in the home per largest shift is provided on-site. In the case of a fractional number of required parking spaces, the number shall be rounded up to the next whole number. The required parking spaces shall be designed and constructed in accordance with Section 17.60.070.

C. A drop-off and pick-up loading area for children is provided on-site. The drop-off area shall be designed to provide for safe drop-off or pick-up of the children without blocking driveway access.

D. A fire extinguisher and smoke detector device and any other regulations adopted by the State Fire Marshall for large family day care homes are provided.

E. Noise levels generated by the family day care home are restricted to the following exterior noise limits: (See next chart below.)

Zoning Classification of Receiving Property	Noise Level (dB) of Sound Source	
	Daytime (7 a.m. to 10 p.m.)	Nighttime (10 p.m. to 7 a.m.)
MU, R-3, R-2, R-1, RE-1, RE-2, RE-3, RE-5, RE-10, C-O, C-1, C-S, BP	50 L _{eq.} (1 hour) ¹	45 L _{eq.} (1 hour) ¹

¹Leq. 1 hour refers to the average noise level measured over a one hour period. (Ord. 2222 § 97, 1998; Ord. 2119 § 42, 1995).

17.52.170 Commercial growing and harvesting of timber. The commercial growing of timber is a permitted use in all districts, except O and O-1. The commercial harvesting of timber shall be permitted as follows:

A. Commercial harvesting of timber encompassing more than three (3) acres is a permitted use in all districts, except O and O-1, provided it is in conformance with the California Forest Practice Rules (Title 14 of the California Code of Regulations).

B. Commercial harvesting of timber, except old growth coniferous forest as identified on the Tuolumne County Wildlife Habitat Maps, encompassing fewer than three (3) acres is a permitted use in all districts, except O and O-1, provided it is in conformance with the California Forest Practice Rules (Title 14 of the California Code of Regulations) and all of the following criteria can be met:

1. The harvesting of timber shall not occur within 100' of a cultural resource site boundary unless a cultural resource protection plan has been approved by the California Department of Forestry and Fire Protection (Cal Fire) or a cultural resource protection plan has been approved by the director. The cultural resource protection plan shall identify any significant archeological or historical sites and means to protect those sites during timber harvesting. Avoidance of the site is an example of an appropriate protection measure. If the significance of a cultural resource site is unknown, it shall be deemed to be significant and shall be protected from significant disturbance.

2. The harvesting of timber shall not occur within riparian or wetland areas, as defined in the Tuolumne County General Plan, as follows unless mitigation measures for potential impacts to the riparian or wetland areas have been identified in a Timber Harvesting Plan or other plan approved by the California Department of Forestry and Fire Protection (Cal Fire) or the timber harvesting as been authorized by an approved County entitlement. Mechanical equipment, such as trucks and bulldozers, shall be prohibited for the harvesting of any timber within the areas listed below. The following setbacks may be reduced by the director if vegetation removal within these areas is necessary for reasons of health and/or safety or is consistent with the Watercourse and Lake Protection Zone requirements of the California Forest Practice Rules:

Perennial streams	100' from centerline
Intermittent streams	75' from centerline
Reservoirs, lakes, Ponds	100' from high water level
Vernal pools	150' from high water level

C. Harvesting of Valley Oak and Aspen species and commercial harvesting of old growth coniferous forest as identified on the Tuolumne County Wildlife Habitat Maps, encompassing fewer than three (3) acres shall be prohibited in all zoning districts unless approved in conjunction with an entitlement from the County or approved by the director if vegetation removal is necessary for reasons of health and/or safety and provided any commercial harvesting is in conformance with

the California Forest Practice Rules (Title 14 of the California Code of Regulations). (Ord. 3225 § 11, 2013; Ord. 2314 § 80, 1999; Ord. 2115 § 30, 1995)

17.52.180 Retail sales, indoor, retail services, indoor, or shopping centers. Where retail sales, indoor, retail services, indoor, or shopping centers are subject to the requirements established herein, the application for a conditional use permit or site development permit shall be referred to the planning commission as provided in section 17.68.180. Any approved conditional use permit or site development permit shall include conditions to ensure compliance with the following provisions:

A. The design and exterior materials of the retail sales or retail services establishment or shopping center shall reflect the traditional architectural motif of the community in which it is proposed, blend with the surrounding neighborhood, or be consistent with any applicable design standards in the general plan or as provided in this title.

B. The retail sales or retail services establishment or shopping center shall be designed and located to be compatible with, rather than imposed on, the landscape and environment by minimizing the amount of grading and topographical alteration and shall be designed in accordance with the provisions of the Tuolumne County Hillside and Hilltop Development Guidelines.

C. An application for a use permit shall be referred to any jurisdictional design review or other planning advisory committee for review and recommendation to the planning commission. (Ord. 3177 § 13, 2011; Ord. 2550 § 21, 2004).

17.52.200 Accessory Dwelling Units.

A. Purpose. The purpose of this chapter is to provide regulations and criteria for the establishment and location of accessory dwelling units in compliance with Government Code Section 65852.2.

B. Locations Permitted. Accessory dwelling units and junior accessory dwelling units are allowed in districts zoned to allow single-family or multifamily uses, subject to the permit requirements of applicable zone districts and compliance with the

development standards of this chapter, and other County plans, policies, and regulations that restrict the construction of dwelling units for health and safety reasons. These health and safety restrictions listed in development standards, County plans, policies and regulations shall supersede the density allowances outlined in this section.

C. Permit Required. An accessory dwelling unit or junior accessory dwelling unit may be attached to or detached from an existing or proposed single-family or multifamily dwelling upon the issuance of a permit in accordance with this chapter. An attached accessory dwelling unit may also be attached to or placed within garages, storage areas, or an accessory structure. The Director shall approve a permit for an accessory dwelling unit and/or junior accessory dwelling unit meeting the development standards of this chapter and consistent with Section 65852.2 of the Government Code.

1. Processing of Permit. A permit application for an accessory dwelling unit or a junior accessory dwelling unit shall be considered and approved ministerially without discretionary review or a hearing, in accordance with Section 65901 or 65906 of the Government Code and all local ordinance provisions regulating the issuance of variances or special-use permits, as follows.

a. On Lots that allow Single-Family Dwellings.

i. An attached accessory dwelling unit or junior accessory dwelling unit shall be allowed subject to the following:

a. The accessory dwelling unit or junior accessory dwelling unit is within the enclosed, conditioned space of a proposed or existing

- single- family dwelling; or
 - b. The accessory dwelling unit or junior accessory dwelling unit is within an existing accessory structure.
 - c. May include an expansion of the primary residence of not more than 150 square feet beyond the current physical dimensions of the existing accessory structure solely to accommodate ingress and egress.
 - d. The unit has exterior access from the proposed or existing single- family dwelling.
- ii. detached, new construction, accessory dwelling unit on a lot with a proposed or existing single-family dwelling. Multiple detached single-unit dwellings on the same lot are not considered multifamily dwellings (see Government Code Section 5852.2(e)(1)(A) and (B)).
- iii. The accessory dwelling unit may be combined with a junior accessory dwelling unit described in subparagraph a. i. for the purposes of a single permit.

- b. On Lots that allow Multifamily Dwellings.
 - i. Multifamily structures may be allowed accessory dwelling units in a total amount of up to 25 percent of the number of total principal units entitled on the property. At least one accessory dwelling unit must be allowed.
 - ii. Accessory dwelling or junior accessory dwelling units may be provided within the portions of existing multifamily dwelling structures that are not used as livable space, including, but not limited to, storage rooms, boiler rooms, passageways, attics, basements, or garages, if each unit complies with state building standards for dwellings.
 - iii. No more than two accessory dwelling units may be detached from a primary multifamily structure.

2. The County of Tuolumne (County) shall not require, as a condition for ministerial approval of a permit application for the creation of an accessory dwelling unit or a junior accessory dwelling unit, the correction of nonconforming zoning conditions.

3. Timing

- a. The County shall act on the application to create an accessory dwelling unit or a junior accessory dwelling unit within 60 days from the date the County receives a completed application if there is an existing single-family or multifamily dwelling on the lot. If the County does not act within 60 days, the application shall be deemed approved.
- b. If the permit application to create an accessory dwelling unit or a junior accessory dwelling unit is submitted with a permit application to create a new single-family dwelling on the lot, the County may delay acting on the permit application for the accessory dwelling unit or the junior accessory dwelling unit until the County acts on the permit application to create the new single-family dwelling, but the application to create the accessory dwelling unit or junior accessory dwelling unit shall be considered without

discretionary review or hearing.

- c. If the applicant requests a delay, the 60-day time period shall be tolled for the period of the delay.

4. The County shall not issue a certificate of occupancy for an accessory dwelling unit before the certificate of occupancy is issued for the primary residence.

D. Junior accessory dwelling units.

In addition to complying with Government Code Section 65852.2, junior accessory dwelling units shall comply with the following:

1. When a junior accessory dwelling unit is permitted, the owner must reside on the property. The owner may reside in either the remaining portion of the structure or the newly created junior accessory dwelling unit. Owner-occupancy shall not be required if the owner is a governmental agency, land trust, housing organization, or other 501(c)(3) organization.

2. A junior accessory dwelling unit may not be detached from the proposed or existing primary residence.

3. A junior accessory dwelling unit shall include a separate entrance from the main entrance to the proposed or existing primary residence.

4. A junior accessory dwelling unit shall include an efficiency kitchen, which shall include:

- a. A cooking facility with appliances; and
- b. A food preparation counter and storage cabinets that are of useable size.

5. Parking shall not be required as a condition to permit a junior accessory dwelling unit.

6. No subdivision of this County Code of Ordinances shall be interpreted to prohibit the

requirement of an inspection, including the imposition of a fee for that inspection, to determine if a junior accessory dwelling unit complies with applicable development standards.

7. Prior to the issuance of a building permit for a junior accessory dwelling unit, the owner of the lot or parcel on which it is to be constructed shall record a deed restriction in a form satisfactory to the County attorney that includes the following:

- a. A prohibition of the sale of the junior accessory dwelling unit separately from the sale of the primary residence, including a statement that the deed restriction may be enforced against future purchasers; and A restriction on the size and attributes of the junior accessory dwelling unit that conforms with Section 65852.2 of the Government Code that regulates accessory dwelling units.

E. Development Standards. The following development standards shall apply to all accessory dwelling units.

1. The living area of a detached accessory dwelling unit shall not exceed 1,200 square feet, which does not include any square footage designated as a garage. The living area includes all conditioned and unconditioned space in the detached accessory dwelling unit. Buildup/underfloor space areas shall not have any improved floor area. Buildup/underfloor areas shall be limited to one light and one plug and may be used as space for equipment serving the ADU. All accessory dwelling units shall be limited to one attached garage, which shall be limited to 50% of

the ADU conditioned/unconditioned floor area. An accessory dwelling unit shall be allowed to be at least 16 feet in height and shall be set back at least four feet from side and rear property lines.

2. No setback shall be required for an existing living area, garage, or other accessory structure that is converted to an accessory dwelling unit (or portion of accessory dwelling unit) with the same dimensions as the existing structure, and a setback of five feet from the side and rear lot lines shall be required for an accessory dwelling unit that is constructed above a garage.

3. Except as otherwise provided in this chapter, the accessory dwelling unit shall not increase an existing or create a new encroachment upon any required front, side, or rear yard space, increase building height or coverage beyond the standards prescribed for the district in which it is located or decrease the distance between structures that is required.

4. No passageway or entrance within view of a street shall be required in conjunction with the construction of an accessory dwelling unit.

5. An accessory dwelling unit shall include at least one bathroom, one kitchen, and one living/dining room.

6. Septic Systems

- a. Where a septic system is used for the proposed ADU, approval by the Environmental Health Director will be required, as allowed by Government Code Section 65852.2 (a)(1)(D)(ix).
- b. A soil mantle test may be required as required by County Code of Ordinances Chapters 13.08 and 13.04. and as allowed

by Government Code Section 65852.2(e)(5).

7. Fees

a. Notwithstanding any provision to the contrary contained in this code (or in any code adopted by reference in this code), an accessory dwelling unit may be connected to a district sewerage system through a side sewer shared with the existing residence on the site, or it may have its own side sewer. In either case, the connection of the accessory dwelling unit to the district sewerage system is subject to the requirements of this Chapter 17.52, including obtaining applicable permits, paying connection charges (where applicable), and paying user charges.

b. Accessory dwelling units shall not be considered new residential uses for the purposes of calculating connection fees or capacity charges for utilities, including water, sewer, and other utilities as defined, unless the accessory dwelling unit was constructed with a new single-family dwelling. Separate metering of utilities is not required for accessory dwelling units unless they are constructed with a new primary dwelling.

Fees will be charged for the construction of accessory dwelling units in accordance with Title 3 of the Tuolumne County Code of Ordinances and state law. The County, special district, or water corporation shall not impose any impact fee

upon the development of an accessory dwelling unit less than 750 square feet. Impact fees include school fees. School districts are authorized but do not have to levy impact fees for ADUs greater than 500 square feet pursuant to Section 17620 of the Education Code. ADUs less than 500 square feet are not subject to school impact fees. Any impact fees charged for an accessory dwelling unit of 750 square feet or more shall be charged proportionately in relation to the square footage of the primary dwelling unit.

c. A connection fee shall not be collected for water, sewer, power, or other utility for a junior accessory dwelling unit.

8. Fire sprinklers shall be required for accessory dwelling units as required by the building code.

a. For purposes of fire or life- protection regulations, a junior accessory dwelling unit shall not be considered a separate or new dwelling unit.

9. An accessory dwelling unit may be rented, but it shall not be offered for sale apart from the principal unit, nor shall the lot or parcel be subdivided to create a separate building site unless approved pursuant to the subdivision ordinance of this County. No accessory dwelling unit may be offered for rental terms of less than 30 days.

a. Notwithstanding

Section 17.52.200.E.9, the County may, by ordinance, allow an accessory dwelling unit to be sold or conveyed separately from the primary residence to a qualified buyer if all the following apply:

- i. The property was built or developed by a qualified nonprofit corporation.
- ii. There is an enforceable restriction on the use of the land pursuant to a recorded contract between the qualified buyer and the qualified nonprofit that satisfies all the requirements of paragraph (10) of subdivision (a) of Section 402.1 of the Revenue and Taxation Code.
- iii. The property is held pursuant to a recorded tenancy in common agreement that includes all the following provisions:
 - a. The agreement allocates to each qualified buyer an undivided, unequal interest in the property based on the size of the dwelling each qualified buyer

- occupies.
- b. A repurchase option that requires the qualified buyer first, offer the qualified nonprofit corporation the opportunity to buy the property if the buyer desires to sell or convey the property.
- c. A requirement that the qualified buyer occupy the property as the buyer's principal residence.
- d. Affordability restrictions on the sale and conveyance of the property that ensure the property will be preserved for low-income housing for 45 years for owner occupied housing units and will be sold or resold to qualified buyer.
- iv. A grant deed naming the grantor and grantee and describing the property interests

being transferred shall be recorded in the county in which the property is located. A Preliminary Change of Ownership Report shall be filed concurrently with this grant deed pursuant to Section 480.3 of the Revenue and Taxation Code.

- v. Notwithstanding any provisions in Section 17.52.200 of this code, if requested by a utility providing service to the primary residence, the accessory dwelling unit shall have a separate water, sewer, or electrical connection to that utility.

10. Except as otherwise provided in this chapter, accessory dwelling units shall comply with all uniform building codes adopted, and all other applicable laws, rules, and regulations. An accessory dwelling unit may consist of manufactured housing if such housing is permitted in the district in which it is proposed to be located and meets the standards for such housing.

- a. Parking
 - i. Required parking shall not exceed one space per unit or per bedroom, whichever is less. Such additional space may be a tandem space in a

driveway or off-street within setback areas provided in locations approved by the County. Tandem parking and the location of off-street parking within setback areas shall be approved by the County unless specific findings can be and are made that parking in setback areas or tandem parking is not feasible based on specific site or regional topographical or fire and life safety

- ii. If a garage, carport, or covered parking structure is demolished in conjunction with the construction of an accessory dwelling unit or is converted to an accessory dwelling unit, those off-street parking spaces are not required to be replaced. This section shall not be considered in the application of any local
- iii. No additional off-street parking spaces shall be required for accessory dwelling units in locations meeting the following criteria:
 - a. The unit is located within one-

half mile walking distance of public transit.

- b. The unit is located within a historic district.
- c. The accessory dwelling unit is part of a proposed or existing primary residence or accessory structure.
- d. On-street parking permits are required but not available to the occupant of the accessory dwelling unit.
- e. There is a car-share vehicle located within one block of the accessory dwelling unit.

F. Other Provisions.

- 1. This section shall not be considered in the application of any local ordinance, policy, or program to limit residential growth.
- 2. No other local ordinance, policy, or regulation shall be the basis for the delay or denial of a building permit or a use permit under Chapter 17.52.
- 3. Any covenant, restriction,

or condition contained in any deed, contract, security instrument, or other instrument affecting the transfer or sale of any interest in a planned development, and any provision of a governing document, that either effectively prohibits or unreasonably restricts the construction or use of an accessory dwelling unit or junior accessory dwelling unit on a lot zoned for single-family residential use that meets the requirements of Section 65852.2 or 65852.22 of the Government Code, is void and unenforceable.

G. Code Enforcement. The code enforcement officer may conduct a review of accessory dwelling units within the county. The code enforcement officer or designee may enforce all provisions of this code and provisions of state law pertaining to the development, occupation, and maintenance of residential properties and accessory dwelling units, pursuant to the following provisions:

- 1. A code enforcement officer may report:
 - a. A change in ownership of the lot or parcel of land on which the residential units are situated.
 - b. A change in the occupancy of the residential units that is not in compliance with this section.
- 2. A code enforcement officer may issue to an owner of an accessory dwelling unit a notice to correct a violation of any provision of any building standard or any failure to comply with this section. The code enforcement officer shall include in that notice a statement that the owner of the unit has a right to request a delay in enforcement pursuant to the following findings:
 - a. The accessory dwelling unit was built before January 1, 2020
 - b. The accessory dwelling

unit was built on or after January 1, 2020; however, at the time the unit was built, the County had a noncompliant accessory dwelling unit ordinance, but the unit is compliant at the time the request is made.

3. The owner of an accessory dwelling unit that receives a notice to correct violations or abate nuisances as described in Section 17.52.200.G, may submit an application to the County requesting that enforcement of the violation be delayed for up to five years on the basis that correcting the violation is not necessary to protect health and safety.

a. The County shall grant an application described in Section 17.52.200.G.3 if it is determined that correcting the violation is not necessary to protect health and safety. In making this determination, the zoning administrator shall consult with the code enforcement officer, building official, and/or the State Fire Marshal or designee pursuant to Section 13146 of the Health and Safety Code.

b. The County shall not approve any applications pursuant to this section on or after January 1, 2030. However, any delay that was approved by the County before January 1, 2030, shall be valid for the full term of the delay that was approved at the time of the initial approval of the

application pursuant to Section 17.52.200.G.3.a. If upon such review it appears that in a particular case a violation of the provisions of this chapter has occurred, the code enforcement officer may take such action as deemed necessary by the Community Development Director to correct any violation.

H. Compliance with State Law. This section is intended to comply with the requirements of Section 65852.2 of the Government Code and any amendments thereto. All accessory and junior accessory dwelling units approved by this section are deemed to not exceed the allowable density for the lot upon which the accessory dwelling unit is located, and accessory and junior accessory dwelling units are a residential use that is consistent with the existing general plan and zoning designations for the lot. (Ord. 3388 § 2, 2021; Ord. 3170 § 114, 2011).

17.52.210 Primary caregivers. One detached secondary single-family dwelling may be temporarily placed on any parcel that contains a primary dwelling where a detached secondary single-family dwelling is not otherwise allowed by this title for the purpose of providing care for elderly or ill persons, subject to the following requirements:

A. The primary caregiver must reside on the parcel;

B. The property owner must submit a letter to the Community Development Director from a physician explaining the need for the detached secondary single-family dwelling;

C. Placement of the detached secondary single-family dwelling must comply with all applicable building codes in effect at the time of installation;

D. The detached secondary single-family dwelling must be no larger than 500 square feet of livable area; and

E. The detached secondary single-

family dwelling shall be removed from the parcel within 60 days following the date it is no longer needed by the person being cared for. The director may require security be provided to insure removal. (Ord. 3170 § 115, 2011).

17.52.220 Commercial events on agricultural land.

Commercial events are the use of land and/or facilities for meetings, gatherings and events, including, but not limited to, weddings, parties and similar uses, for which a fee is charged.

- A. An annual ministerial permit may be acquired from the County to allow up to 40 commercial events to be held per calendar year for up to 300 guests on a parcel zoned AE-37, AE-80 or AE-160 subject to the standards in subsection C.
- B. An annual ministerial permit may be acquired from the County to allow up to two commercial events to be held per calendar year for up to 500 guests on a parcel zoned AE-37, AE-80 or AE-160 subject to the standards in subsection C.
- C. Standards for commercial events:
 - 1. The event venue shall be located on a parcel that complies with the cul-de-sac road standards specified in Section 11.12.040 of this Code.
 - 2. The event venue, excluding parking areas, shall be located at least 200 feet from the boundary of the nearest parcel zoned R or RE.
 - 3. The event parking areas shall be located at least 20 feet from the boundary of any parcel zoned R or RE.
 - 4. Prior to issuance of the annual special event permit, a traffic management plan (TMP) shall be submitted and approved by the Community Resources Agency for events exceeding 100 guests. The TMP shall be prepared by a qualified transportation engineer/consultant and shall include appropriate techniques to provide safe ingress and egress from event facilities without resulting in substantial congestion of roadways, or

otherwise cause traffic-related hazards. Such techniques may include (but may not be limited to):

- a. Temporary caution and directional signage;
 - b. Clearly defined points of ingress/egress;
 - c. Cones or other clear markers placed to help direct vehicle flow define parking areas and driveways; and
 - d. Flag persons to help direct vehicle flow and minimize congestion.
- 5. All events shall occur between the hours of 10:00 a.m. and 10:00 p.m. excluding set up and clean up time. If an event is held entirely within an enclosed building after 10:00 p.m., the event may continue until 2:00 a.m.
 - 6. Noise generated by the event shall not exceed a noise level of 60 dB Leq (1 hour) from 10:00 a.m. to 7:00 p.m. or 50 dB Leq (1 hour) from 7:00 p.m. to 2:00 a.m. as measured at the property line.
 - 7. At least one drinking fountain or equivalent arrangement for potable water shall be provided at no cost to guests. If more than 100 guests are in attendance, two drinking fountains or equivalent arrangement shall be provided.
 - 8. At least one water closet and one urinal shall be provided for every 200 males or portion thereof in attendance at the event and one water closet shall be provided for every 100 females or portion thereof in attendance. For events with 50 or fewer guests in attendance, at least one water closet shall be provided.
 - 9. At least one off-street parking space shall be provided for each two guests in attendance at the event. Parking areas shall be surfaced with gravel, asphalt or asphaltic concrete to reduce dust

- and be maintained free of vegetation. Alternatively, areas covered with grass or pasture areas may be used for parking provided the grass is trimmed to a height of no more than three inches.
10. On-site signage shall not exceed that necessary to identify the venue and direct traffic and shall be removed immediately following each event. On-site signage shall be in accordance with Chapter 17.62 of this Code. Off-site signage shall comply with Chapter 17.62 of this Code if the signage is located on private property. An encroachment permit shall be obtained prior to placing signage within a County road right-of-way.
 11. Lighting shall not exceed that necessary to provide for the safety of guests attending the event. All lighting shall be low level, low intensity and directed downward toward the area to be illuminated to avoid creating glare for residents of the area or passing motorists.
 12. A building permit shall be secured prior to erecting a temporary tent or a temporary stage.
 13. Temporary power cords shall not be affixed to structures, extended through walls, or subjected to environmental or physical damage. Cords shall be secured to prevent tripping hazards. Large diameter cords shall be provided with cord bridges or ramps to facilitate the crossing of wheel chairs, strollers and similar wheeled equipment.
 14. If a commercial event utilizes a tent or membrane structure, the placement, construction and use of that structure shall adhere to all applicable provisions of the California Fire Code, California Building Code and this Code.
 15. Receptacles for refuse and

recyclable materials shall be provided for each event. All refuse and recyclables shall be collected the day following the event and shall be removed from the parcel within seven days following conclusion of the event.

16. If food will be served, the event shall comply with the California Retail Food Code.
 17. If alcohol will be served, the event shall comply with the Alcoholic Beverage Control Act.
- D. A use permit shall be obtained prior to holding a commercial event in the AE-37, AE-80 or AE-160 district that exceeds the number of events or is not in compliance with the standards contained in subsections A through C of this Section.
 - E. Up to 15 commercial events may be held per calendar year for up to 100 persons in the A-20 district subject to the standards contained in subsection C of this Section. A use permit shall be obtained prior to holding a commercial event in the A-20 district for more than 100 persons, not in compliance with the standards of subsection C of this Section or holding more than 15 commercial events in a calendar year.
 - F. A use permit shall be obtained prior to holding any commercial event in the A-10, RE-5 or RE-10 districts.

(Ord. 3350 § 46, 2019)

17.52.230 Music festivals. Music festivals are allowed in any zoning district where tent revivals, circuses or carnivals are allowed provided a Use Permit is first obtained. No Use Permit is required for a music festival held in a permanent building that is consistent with Section 17.52.020 or at a permanent facility constructed for such activities or similar activities. Any outdoor festival as defined in Section 5.12.010 of this Code shall obtain a Special Use Permit pursuant to Section 5.12.020 in lieu of a Use Permit required by this section. (Ord. 3225 § 12, 2013).

17.52.240 Cottage food operations. A cottage food operation is allowed in any permitted

single-family dwelling provided a registration or a permit is first issued by the Environmental Health Division and further provided that the cottage food operation is operated in compliance with Chapter 11.5 (commencing with Section 114365) of Part 7 of Division 104 of the California Health and Safety Code. (Ord. 3225 § 13, 2013).

17.52.250 Mobile food vendors. Mobile food vendors are permitted in all zoning districts, except O and O-1, provided they comply with the following standards:

- A. A mobile food vendor shall comply with the California Retail Food Code (Part 7 (commencing with Section 113700) of Division 104 of the California Health and Safety Code).
- B. A mobile food vendor shall not remain on the same parcel for more than two hours per day, exclusive of set up and take down time, except as provided in subdivision D.
- C. A mobile food vendor shall not park within a County road right-of-way.
- D. Notwithstanding subdivision B, mobile food vendors at a flea market, fair, circus, outdoor music festival or similar event may remain on the parcel for the duration of the event and shall be removed from the parcel when the event ceases. (Ord. 3225 § 14, 2013).

17.52.260 Keeping of poultry in the R-1 district.

Poultry may be kept in any R-1 district as an accessory use to a dwelling located on the parcel where the poultry is kept, subject to the following standards:

- A. Poultry shall be maintained in a clean and sanitary manner and shall not pose a threat to public health.
- B. Poultry shall not cause fouling of the air off the parcel by unpleasant odor.
- C. Poultry shall not create a nuisance to residents of adjacent parcels.
- D. Poultry shall be kept in fully enclosed coops or cages having a roof so the poultry cannot leave the enclosure.
- E. Coops and cages shall not be located within required building setbacks.
- F. Feed shall be stored in rodent-proof containers.
- G. Meat and eggs from the poultry shall not be sold.
- H. Slaughtering of poultry shall occur indoors only.

- I. Roosters and tom turkeys are prohibited.
- J. Except as provided in subdivision K, the maximum allowable poultry per parcel shall be as follows:
 - Less than 0.5 net acre parcel = 2 birds
 - 0.5 but less than 1.0 net acre parcel = 4 birds
 - 1.0 net acre parcel or larger = 6 birds.Chicks in excess of these limits shall be removed from the parcel within 21 days following hatching.
- K. No turkeys may be kept on any parcel that is less than 1.0 net acre in area. (Ord. 3267 § 5, 2014).



Board Meeting Agenda Item Summary

July 12, 2023

ITEM #:	06B	ITEM TYPE:	<input type="checkbox"/> Discussion <input type="checkbox"/> Action <input checked="" type="checkbox"/> Both
SUBJECT:	Discussion/action to adopt Resolution #23-27 – Approving a Fiscal Year 2022-23 Fire Fund Budget Adjustment in the amount of \$7,700 for Engine 722 Repairs.		
RELATION TO STRATEGIC PLAN:	<input type="checkbox"/> N/A <input checked="" type="checkbox"/> Advances Goal/Objective #'s: <u>2</u>		

RECOMMENDED ACTION:

Adopt Resolution #23-27 – Approving a Fiscal Year 2022-23 Fire Fund Budget Adjustment in the amount of \$7,700 for Engine 722 Repairs.

SUMMARY:

In July 2022, the District seized an opportunity to replace its dilapidated 1986 reserve engine with a newer 2001 Type 1 engine – Engine 722. Although a used 2001 Type 1 engine would typically cost more than \$200,000, the District was able to procure Engine 722 from the California OES (Office of Emergency Services) for \$40,000. Updating Engine 722 with paint and District-specific identifiers and radios added approximately \$10,000 to the replacement cost. The purchase of Engine 722 has greatly improved the reliability of the District’s fire fleet and its ability to respond to emergencies.

In the past month, Engine 722 had to be taken to a mechanic shop for motor repairs, which the Board approved in the June 2023 board meeting. Since the initial assessment, additional repairs to the radiator and other components were found to be necessary to be completed to extend the life of the engine.

Engine 722 Repairs are estimated to cost \$7,700 more than initially anticipated. This would bring the total cost for the engine to approximately \$88,000, which is still more than \$100,000 cheaper than what it would have taken to replace the District’s reserve engine through another source. A budget adjustment is needed to complete the repairs.

FINANCIAL IMPACT:

There is enough savings in various expense line items of the FY 2022-23 Fire Fund Budget to cover the additional \$7,700 in repair cost, but Policy #3040 (Purchasing and Expense Authorization) only allows staff to transfer up to \$5,000 between expense line items. Therefore, although this adjustment will have no impact on the overall budget, it requires Board approval.

ATTACHMENTS:

- Resolution #23-27 – Approving a Fiscal Year 2022-23 Fire Fund Budget Adjustment in the amount of \$7,700 for Engine 722 Repairs.

**TWAIN HARTE COMMUNITY SERVICES DISTRICT
RESOLUTION NO. 23-27**

**APPROVING A FISCAL YEAR 2022-23 FIRE FUND BUDGET ADJUSTMENT IN
THE AMOUNT OF \$7,700 FOR ENGINE 722 REPAIRS**

WHEREAS, the Twain Harte Community Services District (District) adopted Resolution #23-25 on June 14, 2023, approving a \$28,500 budget adjustment to repair its 2001 type 1 engine (Engine 722); and

WHEREAS, due to unforeseen problems with Engine 722's radiator, the repairs cost \$7,000 more than anticipated; and

WHEREAS, the Fiscal Year (FY) 2022-23 Fire Fund Budget has enough savings in its overall expense budget to cover the additional costs, but District Policy #3040 (Purchasing and Expense Authorization) does not allow staff to make transfers between budget line items in excess of \$5,000; and

WHEREAS, the repairs require Board approval of a FY 2022-23 Fire Fund Budget adjustment.

NOW, THEREFORE, BE IT RESOLVED, by the District Board of Directors that the Fiscal Year 2022-23 Fire Fund Budget be adjusted as follows:

1. Increase the "Vehicle Maintenance & Repair" Expense line item by \$7,700.00; and
2. Decrease the "Training, Conferences & Travel" Expense line item by \$5,000.00; and
3. Decrease the "Medical Exams" Expense line item by \$1,700.00; and
4. Decrease the "Fuel" Expense line item by \$1,000.00.

PASSED AND ADOPTED, by the Board of Directors of Twain Harte Community Services District on July 12, 2023, by the following vote:

AYES:
NOES:
ABSENT:
ABSTAIN:

ATTEST:

Eileen Mannix, Board President

Kimberly Silva, Board Secretary



Board Meeting Agenda Item Summary

July 12, 2023

ITEM #:	06C	ITEM TYPE:	<input type="checkbox"/> Discussion <input type="checkbox"/> Action <input checked="" type="checkbox"/> Both
SUBJECT:	Discussion/action to adopt Resolution #23-28 – Approving Fiscal Year 2023-24 Budget Adjustments to Modify the Part-Time Utility Maintenance Worker Position to a Full-Time Position.		
RELATION TO STRATEGIC PLAN:	<input checked="" type="checkbox"/> N/A <input type="checkbox"/> Advances Goal/Objective #'s: _____		

RECOMMENDED ACTION:

Adopt Resolution #23-28 – Approving Fiscal Year 2023-24 Budget Adjustments to Modify the Part-Time Utility Maintenance Worker Position to a Full-Time Position.

SUMMARY:

On May 10, 2023, the District created a Utility Maintenance Worker (UM Worker) position. The position was created in response to considerable increases in District janitorial and landscape costs (more than 60%), a need to provide more quality and thorough park facility care, and the desire to provide more reliable and efficient water and sewer operations. The UM Worker position is budgeted as a part-time, non-benefited position in the Fiscal Year (FY) 2023-24 budget.

UM Worker recruitment efforts have been unsuccessful to date, which is mainly due to the position’s part-time status and lack of benefits. To attract a qualified UM Worker and reduce future turnover, staff recommends that the FY 2023-24 budget be adjusted to change the status of the UM Worker to full-time, benefited. This would continue to meet the District’s original needs by providing the following to each District Division:

- Administration – 1.5 hours/week for office janitorial and landscape maintenance
- Operations (Water/Sewer) – 22 Hours/week of operator assistance
- Operations (Park) – 16 hours/week for park facility maintenance
- Fire Division – 0.5 hours/week for Community Center/Training Center maintenance

In order to minimize the increased costs of making the UM Worker a full-time benefited position, staff proposes the following cost-saving operational modifications:

- Revise after-hours operator standby program to have only one operator on-call instead of two (\$18,000+ savings). The need for two operators to respond to an after-hours call is rare and additional operators can still be called upon if needed, but it would be at their own discretion. The change would greatly increase operator free-time outside of work (current schedule is on-call 40% of the year).
- Eliminate the Water/Sewer Intern Program (\$1,500+ savings). The UM Worker position will serve as the training grounds for up-and-coming operators.

District staff believe that making the UM Worker a full-time, benefited position will continue to provide savings to the District, while improving services.

FINANCIAL IMPACT:

Approval of this budget adjustment will increase overall District expenses by \$11,584:

- Administration Fund – \$696 increase

- Water Fund – \$10,903 increase
- Sewer Fund - \$1,694 decrease
- Park Fund - \$1,389 increase
- Fire Fund - \$290 increase

Although costs increase in the Administration and Fire Funds, they remain lower than the increased costs of hiring janitorial and landscape maintenance vendors.

ATTACHMENTS:

- Resolution #23-28 – Approving Fiscal Year 2023-24 Budget Adjustments to Modify the Part-Time Utility Maintenance Worker Position to a Full-Time Position.

**TWAIN HARTE COMMUNITY SERVICES DISTRICT
RESOLUTION NO. 23-28**

**APPROVING FISCAL YEAR 2023-24 BUDGET ADJUSTMENTS TO MODIFY THE
PART-TIME UTILITY MAINTENANCE WORKER POSITION TO A FULL-TIME
POSITION**

WHEREAS, the Twain Harte Community Services District (District) adopted Resolution #23-15 on May 10, 2023, approving the addition of a Utility Maintenance Worker (UM Worker) to replace park facility maintenance vendors, provide assistance to water and sewer operators, and perform administration building janitorial services; and

WHEREAS, the UM Worker position was created to provide a cost savings in light of large landscape and janitorial vendor cost increases, improve quality of park maintenance, and increase water and sewer operations efficiency and reliability; and

WHEREAS, the District adopted its Fiscal Year (FY) 2023-24 Budget via Resolution #23-23 on June 14, 2023, which included expenses for a part-time, non-benefited UM Worker; and

WHEREAS, the District's recruitment efforts for a part-time UM Worker have not been successful due to the lack of benefits and part-time status; and

WHEREAS, the District would like to modify the UM Worker status from part-time to full-time to attract qualified candidates and provide for future employee retention; and

WHEREAS, District staff have collaborated to minimize the costs of said modification by creating operational savings by changing its after-hours operator standby system and eliminating its Water/Sewer Intern Program; and

WHEREAS, the overall increased cost (after realization of operational savings) to change the UM Worker position to full-time status is \$11,584; and

WHEREAS, said cost increases would be allocated across all District funds based on the benefit the UM Worker provides to each District Division; and

WHEREAS, the FY 2023-24 Budget must be adjusted to modify the UM Worker Position to full-time status.

NOW, THEREFORE, BE IT RESOLVED, by the District Board of Directors that the Fiscal Year 2022-23 Budget be adjusted as follows:

1. Administration Fund (total increase of \$696.00):
 - a. Decrease the "Salaries" expense category by \$165.00; and
 - b. Increase the "Benefits" expense category by \$861.00; and
2. Water Fund (total increase of \$10,903.00):
 - a. Increase the "Salaries" expense category by \$4,720.00; and

- b. Increase the “Benefits” expense category by \$6,183.00; and
- 3. Sewer Fund (total decrease of \$1,694.00):
 - a. Decrease the “Salaries” expense category by \$3,710.00; and
 - b. Increase the “Benefits” expense category by \$2,016.00; and
- 4. Park Fund (total decrease of \$1,389.00):
 - a. Decrease the “Salaries” expense category by \$5,695.00; and
 - b. Increase the “Benefits” expense category by \$7,084.00; and
- 5. Fire Fund (total increase of \$290.00):
 - a. Decrease the “Salaries” expense category by \$5.00; and
 - b. Increase the “Benefits” expense category by \$295.00.

PASSED AND ADOPTED, by the Board of Directors of Twain Harte Community Services District on July 12, 2023, by the following vote:

AYES:
NOES:
ABSENT:
ABSTAIN:

ATTEST:

Eileen Mannix, Board President

Kimberly Silva, Board Secretary



Board Meeting Agenda Item Summary

July 12, 2023

ITEM #:	06D	ITEM TYPE:	<input type="checkbox"/> Discussion <input type="checkbox"/> Action <input checked="" type="checkbox"/> Both
SUBJECT:	Presentation of Fiscal Year 2022-23 Strategic Plan progress report and semi-annual review of Strategic Plan.		
RELATION TO STRATEGIC PLAN:	<input checked="" type="checkbox"/> N/A <input type="checkbox"/> Advances Goal/Objective #'s: _____		

RECOMMENDED ACTION:

None. The Board may propose changes to the Strategic Plan based on review/discussion.

SUMMARY:

In 2021, as a result of an annual Board self-evaluation, the Board determined that the Strategic Plan should be reviewed semi-annually, at a minimum. The purpose of these reviews is to maintain familiarity with the plan's strategic goals and objectives, determine whether the strategic goals and objectives continue to capture the District's top priorities, and assess progress.

To aid in the evaluation/review process, a Strategic Plan progress report is provided in July of each year (attached), capturing the progress made during the previous fiscal year. The progress report enables the Board to evaluate progress on Strategic Plan goals and objectives.

While reviewing the Strategic Plan and annual progress report, staff recommends the Board consider the following questions:

1. Are the five strategic goals still the top five priorities for the District?
2. Are the objectives for each goal still relevant?
3. Should any objectives be added to the strategic goals or modified based on new events, circumstances or knowledge?
4. Are there goals or objectives that should be given greater priority?

FINANCIAL IMPACT:

None.

ATTACHMENTS:

- Fiscal Year 2022-23 Strategic Plan Progress Report
- 2019 Strategic Plan

APPENDIX A: Progress Reports

A brief description of the District’s annual accomplishments is listed below each objective.

1. INFRASTRUCTURE OPTIMIZATION	
GOAL	
<i>Prioritize and replace deteriorated infrastructure and enhance existing infrastructure to improve system and operational efficiency.</i>	
OBJECTIVES	
<input checked="" type="checkbox"/> 1.1	Conduct a hydraulic assessment of the water system to analyze fire flow, water loss and potential for operational efficiencies.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Completed water system mapping revisions to ensure accurate hydraulic assessment. Initiated hydraulic assessment. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Completed system hydraulic modeling, identified fire flow deficiencies and developed a feasible way to eliminate the deteriorating Laurel Pump Station and Cedar Pines Tank while improving operations. Completed a condition assessment of the Water Treatment Plant and identified deficiencies and prioritize capital projects.
<input checked="" type="checkbox"/> 1.2	Utilize water system hydraulic assessment to prioritize and complete capital projects.
	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Obtained a \$499,000 grant to improve the hydraulic model, perform a condition assessment on the entire water system, and develop/prioritize capital projects that address the critical issues. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Refined hydraulic assessment on the entire water system and identified/prioritized capital projects that address the critical issues. Initiated design of the highest priority project. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Completed the hydraulic assessment and corresponding engineer’s report, which used the assessment to identify/prioritize capital projects to address critical water system issues. Utilized the hydraulic assessment to perform preliminary engineering for a project to improve fire flows, system efficiency and system pressures by rezoning water system pressure zones, eliminating Cedar Pines Tank, Laurel Pump Station and Sherwood

	Forest Pump Station.
<input checked="" type="checkbox"/> 1.3	Identify sources of water loss and prioritize projects to reduce water loss below 10%.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Identified and repaired a major ongoing leak, reducing water loss by approximately 5-10%. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Obtained a \$499,000 grant to identify locations and causes of water loss and develop/prioritize capital projects to reduce water loss. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Performed a water audit, water loss analysis and leak detection survey and identified large majority of water loss is due to excessive water line breaks due to deteriorating lines and high pressures. Performed a risk assessment of all water facilities to prioritize capital replacement projects that will significantly reduce water line breaks and water loss.
<input checked="" type="checkbox"/> 1.4	Complete Well 3
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Completed Well 3 and put into service.
<input checked="" type="checkbox"/> 1.5	Replace water lines in Sherwood Forest
	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Obtained a \$499,000 grant that will assess the condition of Sherwood Forest water lines (along with the rest of the system) and initiate design of replacement if it is found to be a significant priority. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Initiated grant-funded design for a complete replacement and upgrade of Sherwood Forest water lines. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Completed 30% design for a complete replacement and upgrade of Sherwood Forest water lines. Design will be used to apply for a construction grant in FY 23-24.
<input checked="" type="checkbox"/> 1.6	Conduct a sewer system condition assessment with CCTV to identify degradation and sources of inflow and infiltration (I&I).
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Performed CCTV sewer system condition assessment on approximately 25% of sewer system and identified several locations of I&I. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Completed CCTV sewer system condition assessment, including report identifying degradation and sources of I&I.

☒ 1.7	Conduct a sewer system hydraulic assessment.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> • Completed sewer system mapping revisions to ensure accurate hydraulic assessment. • Initiated hydraulic assessment. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> • Completed sewer system hydraulic assessment, identifying sewer lines that have limited capacity.
☒ 1.8	Utilize sewer system condition and hydraulic assessments to prioritize and complete capital projects.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> • Identified a major source of I&I on the Dogwood Sewer Main due to damage and degradation. Replaced 350' of line and two manholes to eliminate source of I&I. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> • Completed a draft report identifying and prioritizing sewer capital projects based on condition and hydraulic assessments. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> • Identified, prioritized, and estimated sewer capital projects based on sewer system condition and hydraulic assessments. • Completed environmental documentation and applied for a construction grant to replace about 2.2 miles of sewer line that ranked as the highest risk lines. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Completed capital projects to rehabilitate manholes identified in the assessment as being a significant source of I&I. • Continued to pursue funding to replace 2.2 miles of the system's highest risk sewer lines.
☒ 1.9	Improve accuracy of asset information in water and sewer GIS database.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> • Updated water system GIS mapping with accurate meter locations. • Revised water and sewer system mapping to match as-built conditions. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Captured exact location of sewer cleanouts on GIS.
☑ 1.10	Upgrade SCADA system to monitor and control all critical water and sewer facilities.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> • Identified SCADA system upgrade needs and evaluated upgrade technology options.

	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Completed preliminary design of the SCADA system.
☒ 1.11	<p>Develop and implement a water/sewer maintenance program for valve turning, sewer cleaning, and manhole inspection to attain an annual goal of 25% of the system.</p>
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Developed and initiated maintenance plan for valve turning, sewer cleaning and manhole inspection to be tracked in GIS system. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Implemented maintenance plan to achieve more than 25% of the system for valve turning and manhole inspection. Sewer cleaning plan was implemented, but less than 25% was completed due to COVID. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> 62% of Sewer Lines Cleaned 38% of Manholes Inspected 30% of Valves Turned <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> 57% of Sewer Lines Cleaned 28% of Manholes Inspected 29% of Valves Turned
☒ 1.12	<p>Develop and implement a plan for regular hydrant testing.</p>
	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Developed a plan for regular hydrant testing, but delayed implementation due to drought conditions. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Began limited hydrant testing due to drought conditions – tested 9% of hydrants. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Developed and initiated implementation of a plan to perform regular hydrant testing.
☒ 1.13	<p>Enhance work order system for better tracking and querying of maintenance, breaks and repairs.</p>
	<p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Enhanced GIS to track critical maintenance activities and waterline breaks/repairs. Streamlined work orders to move away from fax and quickly identify multiple operators to ensure quick response and better tracking.
☒ 1.14	<p>Explore options to expand fire station living facilities.</p>
	<p><u>FY 20-21</u></p>

	<ul style="list-style-type: none"> • Evaluated several options, but none feasible at this time due to funding constraints. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> • Evaluated several options and grants, including multi-purpose buildings that also provided indoor park facilities, but none feasible at this time due to funding constraints. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Evaluated purchase of two nearby buildings to expand fire station living facilities, but chose not to pursue options after conducting surveys that revealed offering housing to interns would not improve program participation.
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2. EMERGENCY PREPAREDNESS	
GOAL	
<i>Prepare staff, community and infrastructure for wildfire and other events that threaten our community and services.</i>	
OBJECTIVES	
<input checked="" type="checkbox"/> 2.1	Add generators at critical facilities.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> • Installed standby generators at Redwing Sewer Lift Station and Mark Twain Sewer Lift Station. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> • Installed standby generators at Well #1 and Well #3 via a grant. • Replaced failing generator at the Fire Station with a \$15,000 grant. • Obtained a \$60,000 grant to install generators at the Community Center and SCBA Fill Station/Fuel Station. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> • Installed standby generators at the Community Center and SCBA Filling Station/Fuel Station.
<input checked="" type="checkbox"/> 2.2	Harden all critical facilities and establish 100 feet of defensible space.
	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> • Applied for a CalFire grant to perform comprehensive clearing around all critical facilities and procure mastication equipment to maintain clearance around facilities and other locations in the District. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> • Utilized CalFire vegetation crews to create 100 feet of defensible space around Well 3 and the District offices. <p><u>FY 22-23</u></p>

	<ul style="list-style-type: none"> Utilized CalFire vegetation crews to create 100 feet of defensible space around the District’s equipment storage yard, training facilities and Well 2. Removed trees around District office that cast excessive needles on the office roof and to create greater defensible space.
<input checked="" type="checkbox"/> 2.3	Evaluate cyber security and make any necessary improvements.
	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Held an all-staff cyber security training with a cyber security expert. Entered into agreement with an IT professional to perform regular monitoring of District’s computer network. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Attended cyber security training. Evaluated state cyber security programs.
<input checked="" type="checkbox"/> 2.4	Install compatible radio systems in all vehicles to improve inter-department emergency communications.
	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Procured radios to provide for inter-department communications. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Conducted inter-departmental radio programming and use training to improve communications.
<input checked="" type="checkbox"/> 2.5	Collaborate with cooperative agencies to perform vegetation management along major roads.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Collaborated with Tuolumne County to perform vegetation management along Twain Harte Drive and Golf Club Drive.
<input checked="" type="checkbox"/> 2.6	Explore and implement new ways to encourage/assist with local fuels management.
	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Explored establishment of a Volunteer-in-Prevention program that empowers local volunteers to perform defensible space inspections. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Collaborated with CalFire vegetation crews to remove overgrown vegetation in critical areas in the District along sewer line easements. Collaborated with local volunteers and CalFire to work toward establishing a Volunteer-in-Prevention program for inspection of improved parcels. Promoted and assisted the formation of Fire Wise Communities to encourage neighborhoods to work together to remove fuels. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Increased inspection and education for vegetation management on vacant lots and achieved 75% compliance.

	<ul style="list-style-type: none"> Continued to promote the formation of Fire Wise Communities to encourage neighborhoods to work together to remove fuels.
<input checked="" type="checkbox"/> 2.7	Work with community to promote and establish Fire Wise Communities.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Worked with several small neighborhoods through the process to become Fire Wise Communities. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Assisted two neighborhoods in becoming Fire Wise Communities. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Assisted three neighborhoods in becoming Fire Wise Communities. Worked with CERT to conduct a community-wide Fire Wise Community informational training and promotion. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Assisted two neighborhoods in becoming Fire Wise Communities. Worked with CERT to conduct a community-wide Fire Wise Community informational training and promotion.
<input checked="" type="checkbox"/> 2.8	Improve the emergency alert horn system.
	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Applied for a grant to procure a new alert horn after unsuccessful long term repair of the existing horn. New horn will be compatible with other fire departments across the County. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Installed new state-of-the-art emergency alert siren that can be used in coordination with the Sheriff and other local agencies.
<input checked="" type="checkbox"/> 2.9	Develop multiple methods of direct communications with customers.
	<p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Conducted an emergency contact outreach to build our customer email database for critical communications. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Conducted another emergency contact outreach to build our customer email database for critical communications.
<input checked="" type="checkbox"/> 2.10	Work with CERT to continue and expand community emergency trainings.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Worked with CERT to continue community emergency trainings. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> CERT provided a few community emergency trainings, but were limited due to COVID-19 restrictions. CERT provided outreach regarding COVID-19 safety and vaccinations

	<p>and assisted the County to run the vaccination clinic.</p> <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> • CERT provided several community emergency trainings, including grant-funded trainings with subject matter experts. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • CERT performed several community emergency trainings.
☒ 2.11	<p>Identify potential high risk emergency incidents, develop response procedures and perform inter-department tabletop training exercises.</p>
	<p><u>FY 21-22</u></p> <ul style="list-style-type: none"> • Collaborated internally and with external groups to identify high risk emergency incidents and developed response plan outlines. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Developed plan and procedures to respond to the District’s highest risk emergency incidents. • Created a Water Shortage Contingency Plan.
☒ 2.12	<p>Conduct a public outreach campaign to encourage installation of 2-way cleanouts and reduce common sources of sewer system blockages.</p>
	<p><u>FY 21-22</u></p> <ul style="list-style-type: none"> • Created and sent educational bill inserts to all customers. • Performed social media outreach.
☒ 2.13	<p>Improve and expand fire training facility and equipment.</p>
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> • Improved interior and venting of burn prop for safety and realism. • Added a safer fire behavior prop. • Procured grant-funded, thermal-imaging UAV that assists with capture and review of training exercises. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Fire and Operations Divisions collaborated to develop and implement an idea to improve the Community Center to be utilized for fire training courses. • Replaced the dilapidated 1986 Engine 722, which was primarily used for fire training, with a 2001 Type 1 Engine to provide better emergency services reliability and improved training equipment.
☒ 2.14	<p>Promote and conduct trainings with local cooperator agencies.</p>
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> • Held multiple simulated event training exercises with local cooperator agencies, state agencies and Columbia College. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> • Provided training for Columbia College Fire Academy and limited (due to COVID-19) trainings with cooperator agencies.

	<p><u>FY 21-22</u></p> <ul style="list-style-type: none"> • Provided training for Columbia College Fire Academy. • Conducted several multi-agency trainings to improve cooperative response to fire and other emergencies. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Provided training for Columbia College Fire Academy. • Conducted several multi-agency trainings to improve cooperative response to fire and other emergencies.
<input checked="" type="checkbox"/> 2.15	Establish a communitywide AED program, including install of AEDs.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> • Installed one AED in the District board room. • Identified key locations for AED's throughout the community. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> • Created a plan to partner with local businesses to strategically place AED's throughout the community and train business employees to use AED's and perform CPR. • Applied for a grant to procure AED's and implement the AED plan. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> • Obtained grant to procure and install AED's in five strategically located businesses throughout Twain Harte. All equipment has been ordered and is awaiting delivery. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Installed AED's in strategically located businesses throughout Twain Harte and trained employees to perform CPR and use the AED's.
<input checked="" type="checkbox"/> 2.16	Explore options to expand emergency medical services to include EMT II certified staff.
	<p><u>FY 21-22</u></p> <ul style="list-style-type: none"> • Explored options to offer ALS services and found high start-up costs are financially infeasible without tax increases. ALS services also requires costly/lengthy negotiations with the County who currently provides ALS services. • Obtained Advanced Scope EMT status, allowing staff to expand the scope of medical response services to the community. • Worked with Sierra College and County to implement a pilot training program that would allow the District to train and perform EMT-Pre-Paramedic services, further expanding the scope of emergency response medical services the District could provide. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Explored requirements to move from Advanced Scope EMT to EMT II, which include working with Tuolumne County to revise their policy to allow EMT II and purchase of approximately \$100,000 in heart

	monitoring equipment.
<input checked="" type="checkbox"/> 2.17	Obtain funding for a firefighter rehab vehicle.
	<u>FY 19-20</u> <ul style="list-style-type: none"> Obtained grants through CERT and procured a used firefighter rehab vehicle.
<input type="checkbox"/> 2.18	Procure water and sewer emergency response trailers.
<input checked="" type="checkbox"/> 2.19	Procure and install a WiFi cradle point to enable District internet access during power outages and other emergencies.
	<u>FY 20-21</u> <ul style="list-style-type: none"> Installed back-up wireless internet service at District offices, Water Treatment Plant and Fire House to ensure continuous internet access.

3. EXPANDED PARK FACILITIES	
GOAL	
<i>Build Twain Harte Meadows Park and identify recreational opportunities to improve quality of life in Twain Harte.</i>	
OBJECTIVES	
<input checked="" type="checkbox"/> 3.1	Obtain funding for Twain Harte Meadows Park.
	<u>FY 19-20</u> <ul style="list-style-type: none"> Applied for two funding grants. Obtained grants and donations to complete the first phase – Bocce Courts Improvements. <u>FY 20-21</u> <ul style="list-style-type: none"> Obtained a grant to construct approximately 60% of Meadows Park. Applied for a grant that will fund the remainder of Meadows Park. <u>FY 21-22</u> <ul style="list-style-type: none"> Managed funding agreement for grant to construct approximately 60% of Meadows Park. Obtained grant to construct most of the Outdoor Pavilion. Applied for a grant that will fund the remainder of Meadows Park. <u>FY 22-23</u> <ul style="list-style-type: none"> Obtained a Rural Recreation and Tourism Grant from CA Parks and Recreation Department to complete the remainder of Meadows Park.
<input checked="" type="checkbox"/> 3.2	Complete construction of Twain Harte Meadows Park.
	<u>FY 20-21</u> <ul style="list-style-type: none"> Completed construction of Phase 1 of Meadows Park – Bocce Court Improvements. <u>FY 21-22</u>

	<ul style="list-style-type: none"> Completed 60% level design for Meadows Park. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Completed Meadows Park design. Procured a pre-fabricated restroom facility. Advertised Meadows Park for construction bidding.
<input checked="" type="checkbox"/> 3.3	Explore options to improve the Community Center bathrooms, kitchen, parking lot and internet capabilities.
	<p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Worked with Rotary to replace windows, add insulation, improve electrical, add drywall and paint the main meeting room. Added sound panels to the main meeting room to reduce noise. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Fire and Operations Divisions collaborated to develop a solution to share ownership of the Community Center to provide better fire training, a professional facility for community presentations, and an improved public rental facility. Initiated construction on a project to remodel bathrooms, construct an ADA bathroom, remodel the kitchen, construct a storage space for tables and chairs, improve the parking lot, and add internet.
<input type="checkbox"/> 3.4	Explore developing recreational programs to promote community health and relationships.
	<p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Hired personnel with experience in recreation program development.
<input type="checkbox"/> 3.5	Recruit local partners to offer community recreation programs.
	<p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Hired personnel with experience in working with community to offer recreation programs.
<input checked="" type="checkbox"/> 3.6	Advertise park rental opportunities and improve ease of rental process.
	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Created a plan to advertise park facilities via Facebook and bill inserts. Developed a community calendar that will help customers see facility rental availability on the District website. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Promoted several park facilities on Facebook and in a bill insert. Created an option to pay for reservations online and developed a plan to further ease facility rental through the District website. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Developed ideas and online infrastructure to simplify park facility reservations.

☒ 3.7	Develop an easy method for collecting continual resident input on park facilities.
	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Developed a plan to install a QR sign that enables people at the park to provide park input directly from their phone. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Created a park feedback survey on the District’s website and designed/procured signs with QR codes to enable park users to easily link to the survey and provide feedback. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Continually collected feedback through QR code survey signs at park facilities. Responded to concerns and ideas to improve park.

4. COMMUNITY ENGAGEMENT	
GOAL	
<i>Promote community engagement through active education, promotion of District activities and sensitivity to community needs.</i>	
OBJECTIVES	
☒ 4.1	Develop and hold regular community outreach events.
	<p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Initiated monthly community engagement events at District facilities and other places around town, inviting residents to learn more about the District, ask questions, and express concerns. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Held monthly open office hours meetings (Twain Harte Download) for public to ask questions, voice concerns, and learn more about the District’s operations.
☒ 4.2	Participate in local parades and community events.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Participated in 2019 4th of July and Christmas parades. Initiated an annual 4th of July community event. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Participated in 2021 Christmas parade and hosted photos with Santa in the Park. Presented District updates at the annual Twain Harte Homeowners meeting. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Participated in 2022 Christmas parade.

	<ul style="list-style-type: none"> Entered a Fire “crapper” in Twain Harte’s Outhouse Races event. Presented District updates at the annual Twain Harte Homeowners meeting.
☒ 4.3	Conduct four community tours and/or educational programs each year.
	<p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Conducted four fire prevention/education programs with local schools, including one tour of the Fire Station. Led one Water Treatment Plant tour for Twain Harte Elementary. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Led two Water Treatment Plant tours – one for Twain Harte Elementary and one for residents. Held one community event for the Bocce Courts. Conducted a vehicle extrication training in the park with public involvement. Conducted three fire station tours – two for students and one for the community.
☒ 4.4	Develop video outreach program to educate public about projects, staff and other District activities.
	<p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Initiated video outreach program through Facebook and website, including educational videos on fire prevention and leak detection. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Continued to implement and develop video outreach with videos of fire tips, water tips and other District activities. Submitted several press releases for District activities and achievements to the local press.
☒ 4.5	Increase social media, website articles and mailers to educate customers and promote District activities and respond to community questions.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Developed and began implementation of social media outreach plan, greatly improving social media presence. Posted multiple educational and promotional web articles. Created and sent out multiple educational billing inserts. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Continued to establish strong, effective social media presence that now consistently reaches thousands of social media users. Implemented plan to consistently provide billing inserts, bill messaging and web articles to inform and engage customers. <p><u>FY 21-22</u></p>

	<ul style="list-style-type: none"> Continued to establish strong, effective social media presence that consistently reaches thousands of social media users. Created and provided consistent billing inserts, bill messaging and web articles to inform and engage customers. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Continued to establish strong, effective social media presence with more than 2,000 followers. Created and provided consistent billing inserts, bill messaging and web articles to inform and engage customers.
<input checked="" type="checkbox"/> 4.6	Improve outreach to local students.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Conducted a Twain Harte Meadows Park design workshop with 6-8th grade students at Twain Harte Elementary. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Conducted first annual Water Treatment Plant tour for Twain Harte Elementary students. Performed four fire prevention trainings for local students. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Conducted an in-depth water treatment plant tour and training for local students. Performed two fire education programs for local students.
<input checked="" type="checkbox"/> 4.7	Expand website to include ordinances, key policies and FAQ's.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Added FAQ's and key policies to website.
<input checked="" type="checkbox"/> 4.8	Implement paperless billing and conduct outreach on billing and payment options.
	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Researched billing system requirements and prepared system to implement paperless billing in summer 2021. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Implemented paperless billing and conducted outreach to customers, including a promotional drawing/reward for those who signed up. Currently 1/8th of customers have signed up for paperless billing. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Conducted paperless billing outreach to encourage enrollment.
<input checked="" type="checkbox"/> 4.9	Conduct regular outreach to identify community needs and explore options to meet said needs.
	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Conducted a survey regarding fire staffing needs to gauge community interest in participating in the County Fire Tax proposal.

	<p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Created an online survey and signs for all park facilities that enables customers to easily express feedback, ideas and concerns. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Continued to gather community feedback from the ongoing online survey advertised through signs at every park facility. Responded to questions and concerns as well as implemented ideas.
<input checked="" type="checkbox"/> 4.10	Obtain a District of Distinction certificate from Special District Leadership Foundation.
	<p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Awarded the District of Distinction certification.
<input checked="" type="checkbox"/> 4.11	Conduct an outreach campaign in Sherwood Forest to educate regarding water quality and septic systems and explore the potential of converting septic systems to sewer.
	<p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Conducted a grant-funded survey of the Sherwood Forest neighborhood and completed a 30% design of a sewer system. Discussed ideas with some residents during survey work.

5. ORGANIZATIONAL SUSTAINABILITY	
GOAL	
<i>Establish organizational structures, staffing models, and procedures that support long term District health.</i>	
OBJECTIVES	
<input checked="" type="checkbox"/> 5.1	Conduct an evaluation of organizational needs, staffing model and outsourced services for improved efficiency and sustainability. Implement any necessary changes.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Evaluated organization for efficiency and sustainability. Hired a part-time administrative position to fill gaps and improve effectiveness. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Evaluated and restructured the Operations Division staffing model to add an additional staff member at minimal additional cost, providing greater effectiveness and sustainability while meeting staffing needs. Explored staffing model options in the Fire Division to improve depth and effectiveness. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Restructured administration staffing to enable the District to more efficiently meet needs of special projects that would require

	<p>expensive consulting contracts.</p> <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Created a part-time Utility Maintenance Worker position to better care for park facilities, reduce park maintenance costs and provide needed assistance to Water/Sewer Operators.
☒ 5.2	<p>Improve management depth and redundancy through recruitment and training.</p>
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Developed recruitment plan and key job description revisions for effective filling of vacant Fire Chief and Operations Manager positions. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Recruited and filled vacant Fire Chief and Operations Manager positions and implemented training plan and expectations to maximize skills and effectiveness. Added Assistant General Manager duties to the Operations Manager position to provide overlap, depth and greater sustainability. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Recruited and filled vacant Operator 3 position with an operator with extensive utility management experience. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Improved management depth, administrative redundancy, and succession planning by hiring a part-time administrative assistant.
☒ 5.3	<p>Explore options to create a full-time engineer position on each fire shift.</p>
	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Explored multiple options to add full-time engineer positions with limited funding resources. Developed a plan to adjust staffing model to hire seasonal, full-time engineers for five months per year to assist during fire season. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Initiated a SAFER grant application to provide for full-time engineers and firefighters for 3-5 years. Rearranged staffing to enable annual hiring of three seasonal full-time engineers for five months. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Applied for a SAFER grant to provide two full-time firefighters on each shift for 3 years. Negotiated with labor union to add a clause that will increase opportunities for Strike Team mutual aid assignments and corresponding revenue, which could provide for increased staffing.

☒ 5.4	Hire water/sewer/park summer staffing to assist with annual maintenance activities.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> • Hired two seasonal interns to conduct annual valve turning and inspection activities. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> • Restructured Operations Division to add an additional permanent full-time operator to eliminate the need for temporary summer staffing. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Created a new Utility Maintenance Worker position to better care for Park facilities and assist Water/Sewer Operators.
☒ 5.5	Establish an improved District-wide health and safety program.
	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> • Explored wellness program options and successfully tested a temporary wellness plan with employee feedback. • Developed a plan to implement an ongoing wellness program. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> • Developed and implemented an ongoing wellness program to promote overall health of District employees. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Continued to implement an ongoing wellness program.
☒ 5.6	Conduct District-wide staff meeting and trainings to improve inter-department coordination and efficiency.
	<p><u>FY 20-21</u></p> <ul style="list-style-type: none"> • Conducted one all-staff training and coordination meeting, but was limited due to COVID-19 restrictions. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> • Conducted regular inter-departmental coordination meetings to improve coordination and efficiency between departments. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Held regular inter-departmental coordination meetings to improve coordination and efficiency between departments. • Conducted an all-staff and board CPR training.
☑ 5.7	Develop operating procedures for administrative functions.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> • Identified key administrative functions requiring operating procedures and initiated development of operating procedures. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> • Completed operating procedures for critical administrative functions.

	<p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Refined operating procedures for critical administrative functions and identified other administrative functions needing written procedures. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Added a portion of standard administrative tasks to written operating procedures.
<input type="checkbox"/> 5.8	Organize Standard Operating Procedures (SOP) for all departments into a single manual.
<input checked="" type="checkbox"/> 5.9	Identify gaps in SOPs and develop procedures to address gaps.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Identified gaps in water/sewer SOP's and began to develop procedures to fill some of the gaps. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Identified gaps in Fire and Administrative procedures and initiated development of procedures. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Identified gaps in Water/Sewer procedures and developed procedures to address gaps.
<input checked="" type="checkbox"/> 5.10	Develop a central paper filing and records management system.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Completed inventory of all District files. Initiated development of a thorough records retention policy that enables simple ongoing file management. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Completed and adopted an updated and manageable Records Retention Policy. Initiated development of a simple filing structure system. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Developed a draft file structure. Initiated implementation of the Records Retention Policy with existing historical files. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Created filing system structure for paper records. Applied the District's Records Retention Policy to most of the District's paper files, clearing out duplicate and other files that are no longer required to be kept.
<input type="checkbox"/> 5.11	Convert electronic filing system to closely match paper filing system.
<input checked="" type="checkbox"/> 5.12	Store all divisions' electronic files on the central server.
	<u>FY 22-23</u>

	<ul style="list-style-type: none"> • Transitioned all District electronic server files from physical server to cloud server.
<input checked="" type="checkbox"/> 5.13	Review all policies and update.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> • Completed review and any necessary revisions to all policies within Section 1000 of the District’s Policy Manual. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> • Completed review and any necessary revisions to all policies within Section 3000 of the District’s Policy Manual. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> • Completed review and any necessary revisions to all policies within Sections 4000 and 5000 of the District’s Policy Manual. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Completed review and any necessary revisions to approximately half of the policies with Section 2000 of the District’s Policy Manual.
<input checked="" type="checkbox"/> 5.14	Review and update all ordinances.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> • Performed thorough review of Water Ordinance and initiated development of an amended Water Ordinance. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Initiated review of District’s Water and Sewer Ordinances.
<input type="checkbox"/> 5.15	Codify and digitize all ordinances.
<input checked="" type="checkbox"/> 5.16	Review and update Water and Sewer Standards and Specifications.
	<p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Initiated review of District’s Sewer Standards and Specifications.
<input checked="" type="checkbox"/> 5.17	Develop/adopt CEQA guidelines to streamline capital projects.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> • Developed and adopted District CEQA Guidelines.
<input checked="" type="checkbox"/> 5.18	Develop a central, easily accessible source for common employee documents and information.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> • Initiated development of Intranet for easy access to documents/forms. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> • Completed development of Intranet for employees. • Implemented a cloud-based system for all employees to improve communication, shared documents and access to electronic files.
<input checked="" type="checkbox"/> 5.19	Improve remote server access for employees.

	<p><u>FY 21-22</u></p> <ul style="list-style-type: none"> • Installed hardware and software to improve speed and accessibility for Operations and Fire employees to remotely access the server. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Transferred all District files from physical server to cloud-based server, accessible by District employees. • Converted to a cloud-based accounting software, allowing staff to access timesheets remotely.
<p>☒ 5.20</p>	<p>Explore cooperation with other agencies to provide more efficient or quality services.</p>
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> • Discussed formation of a Countywide fire internship program to improve efficiencies and standardize Countywide training. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> • Engaged with County and other fire districts in formation of JPA for a countywide fire tax to improve fire efficiencies. • Collaborated with Columbia College and other fire districts in an attempt to develop a countywide intern program. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> • Entered into agreement with Columbia College to participate in a Countywide internship program. • Explored serving as a pilot program for Sierra College to provide interns and upgrade District medical services to Pre-Paramedic EMT. • Implemented a “Move Up and Cover” procedure with CalFire to ensure command coverage of District at all times. • Collaborated and supported TUD’s efforts to acquire PG&E water supply infrastructure and water rights. • Entered into agreement with RC Health Services to become the only EMT skills training facility in the region. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> • Entered into a mutual aid agreement with TUD to improve emergency water and sewer response. • Updated Administrative Services Agreement with Strawberry Fire Protection District to provide more efficient services. • Assisted with the development and establishment of the CSDA Tuolumne County Chapter to improve LAFCO representation and collaboration among local special districts. • Explored costs, cons, and benefits of contracting for fire services through Tuolumne County’s contract with Cal Fire. • Collaborated with Tuolumne County Water Agency to develop ideas to support improvement of water supply reliability in the region.

☑ 5.21	Perform a water and sewer rate study in 2021 and implement any recommended rate changes.
	<p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Performed 5-year revenue and expense projections for the Water - and Sewer Funds and identified that rate increases would not be necessary until FY 22-23. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Initiated development of a Water and Sewer Rate Study, including adoption of study goals/principles, revenue requirements, and rate structure analysis.
☑ 5.22	Obtain special district representation on Tuolumne County Local Agency Formation Commission (LAFCO).
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Collaborated with County LAFCO and other special districts to obtain special district representation on County LAFCO
☑ 5.23	Evaluate new technology and applications to improve efficiency.
	<p><u>FY 19-20</u></p> <ul style="list-style-type: none"> Evaluated several forms of technology to monitor and control critical water and sewer system components remotely. Initiated development of an intranet site to improve communications between employees, reduce errors and improve admin efficiencies. <p><u>FY 20-21</u></p> <ul style="list-style-type: none"> Implemented a cloud-based email, software and communication system to provide greater connection between staff and easy access to information from anywhere. <p><u>FY 21-22</u></p> <ul style="list-style-type: none"> Identified several cloud-based software options that will improve operational flexibility and efficiency and eliminate the need for a central server, which requires ongoing maintenance and replacement every 5 years. Explored and identified an internet-based phone system that will improve connectivity, ease of use for customers, and flexibility. <p><u>FY 22-23</u></p> <ul style="list-style-type: none"> Implemented an internet-based phone system that provided improved connectivity and flexibility, including enabling remote use of phones during severe winter storms and extended power outages. Used cloud-based technology to eliminate the need for a physical central server, eliminating the need for ongoing maintenance and equipment replacement and improving ease of access for employees. Transitioned financial software system to a cloud-based system that provides better access for employees and eliminates the need for a

	<p>physical server.</p> <ul style="list-style-type: none">• Changed meter reading software to a cloud-based system that eliminates the need for a physical server.• Researched and switched banks to a bank that allows remote check deposits (minimizing bank visits), has no bank fees, and offers higher interest rates.
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Twain Harte Community Services District



STRATEGIC PLAN

Adopted:
November 13, 2019

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Plan Revisions

Date	Description of Change
7/12/22	Remove Goal 1.15 to fix or replace old park bathrooms - table for next Strategic Plan update. Instead place focus on adding new bathrooms in Twain Harte Meadows Park.
7/12/22	After discovering options for offering ALS medical services is cost-prohibitive, change Goal 2.16 from ALS to EMT II.
7/12/22	Modify Goal 3.3 to explore options for improving the Community Center instead of simply improving the Community Center. This allows for a greater focus on developing Twain Harte Meadows Park.
7/12/22	Modify Goal 4.1 to develop and hold regular community outreach meetings, instead of an annual open house or community event.



1.0 Introduction

Purpose

This Strategic Plan (Plan) exists to empower the Twain Harte Community Services District (District) to accomplish its mission by providing vision and specific objectives for the next five years.

The Plan was formed in 2019 by the District’s Board of Directors and staff with the understanding that it is a living document that will be reviewed regularly and revised as needed to better serve the District and the Twain Harte community. The Plan was purposefully fashioned as a succinct, workable document so that it can be easily used to:

- Measure District success
- Generate focused work plans
- Adopt comprehensive, goal-oriented budgets
- Communicate District values and direction to the community

History

The Twain Harte Community Services District was formed on August 1, 1996, to provide water, sewer, park and recreation, fire protection, and hydroelectric services to the Twain Harte community. Its formation resulted in the consolidation of three districts whose service to the community dates as far back as 1935 – Twain Harte Fire Protection District, Tuolumne County Water District No. 1 and Twain Harte Recreation and Park District.



Services

The District currently provides services to 1,583 customers made up of 1,485 residential customers, 87 commercial customers and 11 public entities. It is governed by an elected

five-member Board of Directors and is operated by a twelve member staff. The District's annual revenue is approximately \$4 million, comprised of water/sewer rates and charges, property taxes and special assessments.

The District's services are generally described as follows:

- **Water:** The District provides treated water to all of its customers. Raw water stored in Lyons Reservoir is transported to the District via an open ditch system and is purchased from the Tuolumne Utilities District. The water is treated at the District's water treatment plant (one million gallons per day capacity), pumped through two pump stations, distributed through approximately 29 miles of pipeline and stored in six storage tanks (totaling 2.5 million gallons of storage). The District also owns and operates three groundwater wells to provide water supply reliability and Shadybrook Reservoir, which serves as an emergency water supply source.



- **Sewer:** The District owns and operates a wastewater collection system consisting of approximately 19 miles of sewer mains. All wastewater collected by the District is conveyed to Tuolumne Utilities District for treatment. The Sherwood Forest subdivision is the only area within the District that utilizes individual septic systems to treat wastewater.

- **Fire Protection:** The District provides fire protection and rescue services to the District and the greater Twain Harte area through mutual aid contracts with nearby cooperating fire agencies. With full-time staffing, three engines and a centrally located fire station, the District is able to provide emergency response in less than five minutes.



- **Park and Recreation:** The District operates and maintains several facilities to serve the communities' recreation needs – tennis courts, baseball field, bocce courts, skateboard park, playground, outdoor stage, walking trail and Community Center building.



- **Hydroelectric:** The District owns a 27-kilowatt hydroelectric generator located at Shadybrook Reservoir. The generator is not currently used due to lack of water.

2.0 Mission, Vision, Values

Mission

To provide quality and efficient services to our community in a professional, reliable and fiscally responsible manner.

Vision

To lead the way in providing services that protect and enhance our community's quality of life.



Values

We value and strive for excellence in:

Quality of Life

Customer Service & Relationships

Professional, Proactive & Innovative Leadership

A Safe & Positive Work Environment

Integrity & Transparency

Fiscal Responsibility

Reliability & Sustainability

Asset & Resource Management

Community Engagement

Collaborative Relationships

Continual Improvement

3.0 Goals & Objectives

Building on its mission, vision and values, the District identified five strategic focus areas:

1. Infrastructure Optimization
2. Emergency Preparedness
3. Expanded Park Facilities
4. Community Engagement
5. Organizational Sustainability

1. INFRASTRUCTURE OPTIMIZATION	
GOAL	
<i>Prioritize and replace deteriorated infrastructure and enhance existing infrastructure to improve system and operational efficiency.</i>	
OBJECTIVES	
<input type="checkbox"/> 1.1	Conduct a hydraulic assessment of the water system to analyze fire flow, water loss and potential for operational efficiencies.
<input type="checkbox"/> 1.2	Utilize water system hydraulic assessment to prioritize and complete capital projects.
<input type="checkbox"/> 1.3	Identify sources of water loss and prioritize projects to reduce water loss below 10%.
<input type="checkbox"/> 1.4	Complete Well 3
<input type="checkbox"/> 1.5	Replace water lines in Sherwood Forest
<input type="checkbox"/> 1.6	Conduct a sewer system condition assessment with CCTV to identify degradation and sources of inflow and infiltration (I&I).
<input type="checkbox"/> 1.7	Conduct a sewer system hydraulic assessment.
<input type="checkbox"/> 1.8	Utilize sewer system condition and hydraulic assessments to prioritize and complete capital projects.
<input type="checkbox"/> 1.9	Improve accuracy of asset information in water and sewer GIS database.
<input type="checkbox"/> 1.10	Upgrade SCADA system to monitor and control all critical water and sewer facilities.
<input type="checkbox"/> 1.11	Develop and implement a water/sewer maintenance program for valve turning, sewer cleaning, and manhole inspection to attain an annual goal of 25% of the system.
<input type="checkbox"/> 1.12	Develop and implement a plan for regular hydrant testing.
<input type="checkbox"/> 1.13	Enhance work order system for better tracking and querying of maintenance, breaks and repairs.

<input type="checkbox"/> 1.14	Explore options to expand fire station living facilities.
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2. EMERGENCY PREPAREDNESS

GOAL

Prepare staff, community and infrastructure for wildfire and other events that threaten our community and services.

OBJECTIVES

<input type="checkbox"/> 2.1	Add generators at critical facilities.
<input type="checkbox"/> 2.2	Harden all critical facilities and establish 100 feet of defensible space.
<input type="checkbox"/> 2.3	Evaluate cyber security and make any necessary improvements.
<input type="checkbox"/> 2.4	Install compatible radio systems in all vehicles to improve inter-department emergency communications.
<input type="checkbox"/> 2.5	Collaborate with cooperative agencies to perform vegetation management along major roads.
<input type="checkbox"/> 2.6	Explore and implement new ways to encourage/assist with local fuels management.
<input type="checkbox"/> 2.7	Work with community to promote and establish Fire Wise Communities.
<input type="checkbox"/> 2.8	Improve the emergency alert horn system.
<input type="checkbox"/> 2.9	Develop multiple methods of direct communications with customers.
<input type="checkbox"/> 2.10	Work with CERT to continue and expand community emergency trainings.
<input type="checkbox"/> 2.11	Identify potential high risk emergency incidents, develop response procedures and perform inter-department tabletop training exercises.
<input type="checkbox"/> 2.12	Conduct a public outreach campaign to encourage installation of 2-way cleanouts and reduce common sources of sewer system blockages.
<input type="checkbox"/> 2.13	Improve and expand fire training facility and equipment.
<input type="checkbox"/> 2.14	Promote and conduct trainings with local cooperator agencies.
<input type="checkbox"/> 2.15	Establish a communitywide AED program, including install of AEDs.
<input type="checkbox"/> 2.16	Explore options to expand emergency medical services to include EMT II certified staff.
<input type="checkbox"/> 2.17	Obtain funding for a firefighter rehab vehicle.
<input type="checkbox"/> 2.18	Procure water and sewer emergency response trailers.
<input type="checkbox"/> 2.19	Procure and install a WiFi cradle point to enable District internet access during power outages and other emergencies.

3. EXPANDED PARK FACILITIES

GOAL

Build Twain Harte Meadows Park and identify recreational opportunities to improve quality of life in Twain Harte.

OBJECTIVES

<input type="checkbox"/> 3.1	Obtain funding for Twain Harte Meadows Park.
<input type="checkbox"/> 3.2	Complete construction of Twain Harte Meadows Park.
<input type="checkbox"/> 3.3	Explore options to improve the Community Center bathrooms, kitchen, parking lot and internet capabilities.
<input type="checkbox"/> 3.4	Explore developing recreational programs to promote community health and relationships.
<input type="checkbox"/> 3.5	Recruit local partners to offer community recreation programs.
<input type="checkbox"/> 3.6	Advertise park rental opportunities and improve ease of rental process.
<input type="checkbox"/> 3.7	Develop an easy method for collecting continual resident input on park facilities.

4. COMMUNITY ENGAGEMENT

GOAL

Promote community engagement through active education, promotion of District activities and sensitivity to community needs.

OBJECTIVES

<input type="checkbox"/> 4.1	Develop and hold regular community outreach events.
<input type="checkbox"/> 4.2	Participate in local parades and community events.
<input type="checkbox"/> 4.3	Conduct four community tours and/or educational programs each year.
<input type="checkbox"/> 4.4	Develop video outreach program to educate public about projects, staff and other District activities.
<input type="checkbox"/> 4.5	Increase social media, website articles and mailers to educate customers and promote District activities and respond to community questions.
<input type="checkbox"/> 4.6	Improve outreach to local students.
<input type="checkbox"/> 4.7	Expand website to include ordinances, key policies and FAQ's.
<input type="checkbox"/> 4.8	Implement paperless billing and conduct outreach on billing and payment options.
<input type="checkbox"/> 4.9	Conduct regular outreach to identify community needs and explore options to meet said needs.

<input type="checkbox"/> 4.10	Obtain a District of Distinction certificate from Special District Leadership Foundation.
<input type="checkbox"/> 4.11	Conduct an outreach campaign in Sherwood Forest to educate regarding water quality and septic systems and explore the potential of converting septic systems to sewer.

5. ORGANIZATIONAL SUSTAINABILITY	
GOAL	
<i>Establish organizational structures, staffing models, and procedures that support long term District health.</i>	
OBJECTIVES	
<input type="checkbox"/> 5.1	Conduct an evaluation of organizational needs, staffing model and outsourced services for improved efficiency and sustainability. Implement any necessary changes.
<input type="checkbox"/> 5.2	Improve management depth and redundancy through recruitment and training.
<input type="checkbox"/> 5.3	Explore options to create a full-time engineer position on each fire shift.
<input type="checkbox"/> 5.4	Hire water/sewer/park summer staffing to assist with annual maintenance activities.
<input type="checkbox"/> 5.5	Establish an improved District-wide health and safety program.
<input type="checkbox"/> 5.6	Conduct District-wide staff meeting and trainings to improve inter-department coordination and efficiency.
<input type="checkbox"/> 5.7	Develop operating procedures for administrative functions.
<input type="checkbox"/> 5.8	Organize Standard Operating Procedures (SOP) for all departments into a single manual.
<input type="checkbox"/> 5.9	Identify gaps in SOPs and develop procedures to address gaps.
<input type="checkbox"/> 5.10	Develop a central paper filing and records management system.
<input type="checkbox"/> 5.11	Convert electronic filing system to closely match paper filing system.
<input type="checkbox"/> 5.12	Store all divisions' electronic files on the central server.
<input type="checkbox"/> 5.13	Review all policies and update.
<input type="checkbox"/> 5.14	Review and update all ordinances.
<input type="checkbox"/> 5.15	Codify and digitize all ordinances.
<input type="checkbox"/> 5.16	Review and update Water and Sewer Standards and Specifications.

<input type="checkbox"/> 5.17	Develop/adopt CEQA guidelines to streamline capital projects.
<input type="checkbox"/> 5.18	Develop a central, easily accessible source for common employee documents and information.
<input type="checkbox"/> 5.19	Improve remote server access for employees.
<input type="checkbox"/> 5.20	Explore cooperation with other agencies to provide more efficient or quality services.
<input type="checkbox"/> 5.21	Perform a water and sewer rate study in 2021 and implement any recommended rate changes.
<input type="checkbox"/> 5.22	Obtain special district representation on Tuolumne County Local Agency Formation Commission (LAFCO).
<input type="checkbox"/> 5.23	Evaluate new technology and applications to improve efficiency.

4.0 Plan Review, Revisions & Reporting

The District will review this Plan at least once annually to ensure that the Plan continues to be accurate and best serve the needs of the District. Plan revisions may be made at any time. All revisions must be approved by the Board of Directors. A record of revisions will be kept on the Table of Contents page.

At the end of each fiscal year, the General Manager will prepare a brief report for the Board of Directors summarizing the progress that has been made toward attaining the District's goals and objectives. Reports will be included in the Appendix of this Plan.

APPENDIX A: Progress Reports

A brief description of the District's annual accomplishments is listed below each objective.



Board Meeting Agenda Item Summary

July 12, 2023

ITEM #:	06E	ITEM TYPE:	<input type="checkbox"/> Discussion <input type="checkbox"/> Action <input checked="" type="checkbox"/> Both
SUBJECT:	Discussion/action to approve General Manager Objectives for Fiscal Year 2023-24.		
RELATION TO STRATEGIC PLAN:	<input checked="" type="checkbox"/> N/A <input type="checkbox"/> Advances Goal/Objective #'s: _____		

RECOMMENDED ACTION:

Approve the General Manager Objectives for Fiscal Year 2023-24.

SUMMARY:

The District's General Manager Employment Agreement requires the General Manager to submit performance objectives to the Board each fiscal year. The attached General Manager Objectives for Fiscal Year 2023-24 are based on the District's Strategic Plan goals and objectives and other major upcoming, time-sensitive tasks.

FINANCIAL IMPACT:

None.

ATTACHMENTS:

- General Manager Objectives for Fiscal Year 2023-24.



Twain Harte Community Services District

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GENERAL MANAGER OBJECTIVES

Fiscal Year 2023/24

Infrastructure Optimization

Objective [SP 1.2]: Hydraulic Assessment Capital Projects

1. Initiate design to upgrade water lines and eliminate the degrading Laurel Pump Station and Cedar Pines tank.

Objective [SP 1.5]: Sherwood Forest Water System

1. Complete 90% design for replacement/upgrade of water lines in Sherwood Forest.
2. Complete a grant application to fund replacement/upgrade of Sherwood Forest water lines.

Objective [SP 1.8]: Sewer System Assessment Capital Projects

1. Complete a household income survey in pursuit of grant funding for construction of the Twain Harte Pipeline Replacement Project.

Objective [SP 1.10]: Upgrade Water and Sewer SCADA System

1. Complete design of SCADA upgrades to monitor and control critical water/sewer facilities.

Emergency Preparedness

Objective [SP 2.2]: Critical Facility Protection

1. Work with Cal Fire vegetation crews to create defensible space around the Water Treatment Plant.

Objective [SP 2.3]: Cyber Security Evaluation

1. Evaluate cyber security in connection with new SCADA system design.

Objective [SP 2.6, 2.7]: Improve Vegetation/Fuels Management

1. Continue to work with residents to improve vacant lot vegetation management compliance.

Objective [SP 2.9]: Improve Emergency Customer Communication

1. Perform outreach to customers to gain email contact information for emergency communication.

Expanded Park Facilities

Objective [SP 3.2]: Twain Harte Meadows Park Development

1. Make sufficient progress on Twain Harte Meadows Park to ensure completion in 2024.

Objective [SP 3.3]: Improve Community Center

1. Complete Community Center Improvement Project.

Objective [SP 3.4, 3.5]: Recreation Programs

1. Begin to explore partnerships with community partners to offer recreation programs.

Objective [SP 3.6]: Park Engagement

2. Promote park facility rental and simplify the rental process.

Community Engagement

Objective [SP 4.3]: Promote District Activities and Customer Education

1. Offer at least two community tours of two different District facilities.

Objective [SP 4.17]: Expand Website

1. Add updated Ordinances and key policies to website.

Organizational Sustainability

Objective [SP 5.3]: Fire Staffing

1. Continue to explore options to improve fire staffing levels.

Objective [SP 5.7, 5.8]: Standard Operating Procedures (SOP)

1. Complete SOP's for standard administrative functions.
2. Organize SOP's for all departments into one online source, accessible to all employees.

Objective [SP 5.10, 5.11, 5.12]: Central Filing System

1. Complete central filing system organization and implement system for regular filing.

Objective [SP 5.13, 5.14]: Policy and Ordinance Update

1. Review and update (as needed) remaining policies in Section 2000 of the District Policy Manual.
2. Review and update the District's Water Ordinance.
3. Review and update the District's Sewer Ordinance.

Objective [SP 5.16]: Water and Sewer Standards Update

1. Review and update the District's Sewer Standards.
2. Review and update the District's Water Standards.

Objective [SP 5.21]: Water and Sewer Rate Study

1. Complete a water and sewer rate study.
2. Complete the Proposition 218 process for 5-year water and sewer rate increases (if needed).



Board Meeting Agenda Item Summary

July 12, 2023

ITEM #:	06F	ITEM TYPE:	<input type="checkbox"/> Discussion <input type="checkbox"/> Action <input checked="" type="checkbox"/> Both
SUBJECT:	Discussion/action to cast a vote for the Special District Risk Management (SDRMA) board of directors.		
RELATION TO STRATEGIC PLAN:	<input checked="" type="checkbox"/> N/A <input type="checkbox"/> Advances Goal/Objective #'s: _____		

RECOMMENDED ACTION:

The Board will select up to three candidates to cast a vote for the Special District Risk Management (SDRMA) board of directors.

SUMMARY:

The District is a member of the Special District Risk Management Authority (SDRMA), a joint powers authority that provides the District’s insurance – both general and liability and workers’ compensation. SDRMA is governed by an 18-member Board of Directors elected by mail ballots. The Board consists of three directors from each of the six networks throughout California. This includes the Sierra Network in which the District is located.

The District received notification of nominations for three (3) seats on the SDRMA Board of Directors in January 2023. On May 11, 2023, SDRMA’s Election Committee reviewed the nomination documents submitted by the candidates in accordance with SDRMA’s Policy No. 2022-06 – Establishing Guidelines for Director Elections. The Election Committee confirmed that (4) candidates met the qualification requirements, and those names are included on the Official Election Ballot. The four-year terms for newly elected Directors will begin on January 1, 2024, and terminate on December 31, 2027.

SDRMA requests that the District Board cast a vote for three of the candidates on the Official Election Ballot.

FINANCIAL IMPACT:

None.

ATTACHMENTS:

- SDRMA 2023 Board Election Ballot Letter.
- SDRMA 2023 Board Election Ballot Packet.



1112 I Street, Suite 300
Sacramento, California 95814-2865
T 916.231.4141 or 800.537.7790 * F 916.231.4111

Maximizing Protection. Minimizing Risk. *www.sdrma.org

May 15, 2023

Ms. Carolyn Higgins
Finance Officer
Twain Harte Community Services District
22912 Vantage Pointe Dr
Twain Harte, California 95383-0649

RE: Notification of Election Ballot – 2023 SDRMA Board of Directors Election

Dear Ms. Higgins,

The Special District Risk Management Authority (SDRMA) Board of Directors 2023 Election began in January, with the opening of nominations. On May 11, 2023, SDRMA's Election Committee reviewed the nomination documents submitted by the candidates in accordance with SDRMA's Policy No. 2022-06 Establishing Guidelines for Director Elections. The Election Committee confirmed that (4) candidates met the qualification requirements, and those names are included on the Official Election Ballot.

The Official Election Ballot Document Packet posted below this letter as an attachment in Memberplus includes:

- *Election Ballot Instructions*
- *Official Election Ballot (Action Required)*
- *Candidate's Statements of Qualifications (4)*

The signed Official (wet signature) Election Ballot **MUST** be sealed and received by mail or hand delivery at SDRMA's office on or before 4:30 p.m. on Tuesday, August 8, 2023, to the address below. Faxes or electronic transmissions are NOT acceptable.

Special District Risk Management Authority
Election Committee
1112 "I" Street, Suite 300
Sacramento, California 95814

Important Balloting and Election Dates – The balloting and election dates are as follows:

- **August 8, 2023:** Deadline for members to return the signed Official Election Ballot.
- **August 9-11, 2023:** Ballots are opened and counted.
- **August 10-11, 2023:** Election results are announced, and candidates notified.



- **November 1-2, 2023:** Newly elected Directors are invited to attend SDRMA board meeting (Sacramento).
- **January 2024:** Newly elected Directors are seated, and Board officer elections are held.

Please do not hesitate to contact SDRMA's Management Analyst Candice Richardson at crichardson@sdrma.org or 800-537-7790 if you have any questions regarding the election and balloting process.

Sincerely,
Special District Risk Management Authority

A handwritten signature in blue ink that reads "Candice Richardson".

Candice Richardson
Management Analyst



SPECIAL DISTRICT RISK MANAGEMENT AUTHORITY

2023 BOARD OF DIRECTORS ELECTION

OFFICIAL ELECTION BALLOT ATTACHED

This is an official election packet that contains items that require ACTION by your Agency's governing body for the selection of up to three (3) candidates to the SDRMA Board of Directors.

ELECTION PACKET ENCLOSURES

- Election Ballot Instructions
- Official Election Ballot (Action Required)
- Candidate's Statements of Qualifications (4)



SDRMA'S BOARD OF DIRECTORS ELECTION BALLOT INSTRUCTIONS

Notification of nominations for three (3) seats on the Special District Risk Management Authority's (SDRMA's) Board of Directors was mailed to the membership in January 2023.

On May 11, 2023, SDRMA's Election Committee reviewed the nomination documents submitted by the candidates in accordance with SDRMA's Policy No. 2022-06 Establishing Guidelines for Director Elections. The Election Committee confirmed that (4) candidates met the qualification requirements, and those names are included on the Official Election Ballot.

The Official Election Ballot along with a Statement of Qualifications as submitted by each candidate is posted to the SDRMA MemberPlus portal along with these instructions. Election instructions are as follows:

1. The Official Election Ballot must be used to ensure the integrity of the balloting process.
2. Print a copy of this ballot, then select up to three (3) candidates. Your agency's governing body must approve the Official Election Ballot at a public meeting. **Ballots containing more than four (4) candidate selections will be considered invalid and not counted.**
3. The signed Official Election Ballot MUST be sealed and received by mail or hand delivery at SDRMA's office on or before 4:30 p.m. on Tuesday, August 8, 2023 to the address below. Faxes or electronic transmissions are NOT acceptable.
Special District Risk Management Authority
Election Committee
1112 "I" Street, Suite 300
Sacramento, California 95814
4. The four-year terms for newly elected Directors will begin on January 1, 2024, and terminate on December 31, 2027.
5. Important balloting and election dates are:
 - **August 8, 2023: Deadline for members to return the signed Official Election Ballot.**
 - **August 9-11, 2023:** Ballots are opened and counted.
 - **August 10-11, 2023:** Election results are announced, and candidates notified.
 - **November 1-2, 2023:** Newly elected Directors are invited to attend SDRMA board meeting (Sacramento).
 - **January 2024:** Newly elected Directors are seated, and Board officer elections are held.

Please do not hesitate to contact SDRMA's Management Analyst Candice Richardson at crichardson@sdrma.org or 800-537-7790 if you have any questions regarding the election and balloting process.

OFFICIAL 2023 ELECTION BALLOT
SPECIAL DISTRICT RISK MANAGEMENT AUTHORITY
BOARD OF DIRECTORS

VOTE FOR ONLY THREE (3) CANDIDATES

Mark each selection directly onto the ballot, voting for no more than three (3) candidates. Each candidate may receive only one (1) vote per ballot. A ballot received with more than three (3) candidates selected will be considered invalid and not counted. All ballots must be sealed and received by mail or hand delivery at SDRMA on or before 4:30 p.m., Tuesday August 8, 2023. Faxes or electronic transmissions are NOT acceptable.

- ROBERT SWAN** (INCUMBENT)
Director, Groveland Community Services District

- ACQUANETTA WARREN**
Vice Chair, Local Agency Formation Commission for San Bernardino County

- JESSE CLAYPOOL** (INCUMBENT)
Board Chair, Honey Lake Valley Resource Conservation District

- SANDY SEIFERT-RAFFELSON** (INCUMBENT)
General Manager, Herlong Public Utility District

ADOPTED this ____ day of _____, 2023 by the:

at a public meeting by the following votes:

AYES: _____

NOES: _____

ABSTAIN: _____

ABSENT: _____

ATTEST:

APPROVED:

**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**

This information will be distributed to the membership with the ballot, "exactly as submitted" by the candidates – no attachments will be accepted. No statements are endorsed by SDRMA.

Candidate* Bob Swan
District/Agency Groveland Community Services District (GCSD)
Work Address P.O. Box 350, Groveland CA 95321
Work Phone (209) 962-7131 Cell Phone (408) 398-4731

*The name or nickname and any designations (i.e. CPA, SDA, etc.) you enter here will be printed on the official ballot, exactly as submitted.

Why do you want to serve on the SDRMA Board of Directors? (Response Required)

I have been a member of the SDRMA Board for two terms. I would like to be elected to a third term because:
1. As a board member of Groveland CSD, I am very aware of the great value that smaller districts get from their membership in SDRMA, and I'd like to continue to support the Authority's great member services.
2. While the organization continues to operate well, thanks to its experienced and motivated staff, we are once again going through a period of management change. I believe that Board continuity is particularly important at such a time.
3. The California re-insurance market continues to be challenging. I believe that my eight years of board experience will be helpful as we negotiate the potentially tricky economic future.
4. Personally, I feel that we have a very well-functioning and collegial Board, and I find it both challenging and enjoyable to be part of it.

What Board or committee experience do you have that would help you to be an effective Board Member? (SDRMA or any other organization) (Response Required)

1. SDRMA Board: Member since 2016, presently Vice President. I am our representative on the CSDA Legislative Committee (and a member in my own right), and on the Alliance Executive Council.
2. Groveland CSD Board: Member since appointment in June 2013. I was Board President 2014-2018.
3. Member of Board of Southside Community Connections, which is a 501(c)(3) nonprofit in Groveland that provides transportation, educational, social and recreational services to seniors and differently-abled folks in the Groveland area. I was on this Board from 2018 through 2022, mostly as Treasurer.
4. Board Member (Treasurer) of Pine Cone Performers, a local community choral and acting group, since 2010.

**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**

What special skills, talents, or experience (including volunteer experience) do you have? (Response Required)

Background: BS Physics, MS Computer Science. 3 years in USAF. 30 years in the semiconductor industry as engineer, engineering manager, business unit director.

Skills, etc.: Very familiar with financial reports and cost accounting. Working knowledge of computer and communications technology. In my work life, I managed geographically distributed organizations with up to 150 technical personnel and up to \$120 million in annual sales. I'm pretty good at helping groups work together to achieve consensus (or, failing that, acceptable compromise).

In recent years, most of my volunteer work has been in driving folks (who can't drive themselves) to medical appointments, shopping, and the like. This is one of the services of Southside Community Connections.

I'm also a pretty decent choral singer, but that's not relevant to this application.

What is your overall vision for SDRMA? (Response Required)

Our vision statement is "To be the exemplary public agency risk pool of choice for California special districts and other public agencies". To achieve this vision, I believe we must focus on:

(1) maintaining long-term financial stability, by ensuring that there is a fair allocation of cost versus risk across the membership, continuously evaluating the appropriate level of risk retention, and using creative ideas like our "captive" reinsurance agency to enhance our cash position.

(2) continue to expand our risk management training and assistance services. We have made significant improvements in this area by bring it internal to the Authority.

(3) continue to emphasize services to our core membership: small to mid-sized districts with limited options for insurance.

(4) ensure that SDRMA remains a desirable workplace, and maintain our highly-qualified and responsive staff.

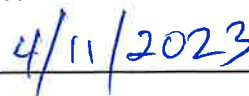
Above all, remember that this is an insurance pool, owned by its member agencies, and maintain an overarching focus on member service and support. Make certain that we will be here for our members.

I certify that I meet the candidate qualifications as outlined in the SDRMA election policy. I further certify that I am willing to serve as a director on SDRMA's Board of Directors. I will commit the time and effort necessary to serve. Please consider my application for nomination/candidacy to the Board of Directors.

Candidate Signature



Date



**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**

This information will be distributed to the membership with the ballot, "exactly as submitted" by the candidates – **no attachments will be accepted**. No statements are endorsed by SDRMA.

Candidate* **ACQUANETTA WARREN**
District/Agency **Local Agency Formation Commission (LAFCO) for San Bernardino County**
Work Address **1170 W. Third Street, Unit 150, San Bernardino, CA 92415-0490**
Work Phone **(909)388-0480** Home Phone

*The name or nickname and any designations (i.e. CPA, SDA, etc.) you enter here will be printed on the official ballot, exactly as submitted.

Why do you want to serve on the SDRMA Board of Directors? (Response Required)

As a City Mayor I have been fortunate to serve on regional boards that include special district representation: San Bernardino Countywide Oversight Board and Southern California Water Coalition's Board of Trustees. I realize that special districts, especially the smaller districts, are not included in the conversation for a variety of matters. Currently, I serve on San Bernardino LAFCO and the California Association of LAFCOs, which do have robust special district representation. I believe that my skills, experience, and understanding can contribute to SDRMA. Specifically, I want to contribute by developing programs that would help member agencies maximize their protection and minimize their risks.

What Board or committee experience do you have that would help you to be an effective Board Member? (SDRMA or any other organization) (Response Required)

I currently serve as mayor for the City of Fontana. This is my fourth term, and my focus has been bolstering economic development, creating educational opportunities, improving public safety, and advocating for a healthier community. As mayor, I have been fortunate to serve on:

- San Bernardino LAFCO since 2014, serving currently as Vice Chair of the Commission. I am also a Board Member of the statewide organization of LAFCOs, CALAFCO, serving as Treasurer
- San Bernardino County Transportation Authority: Board of Directors, General Policy Committee, and Transit Committee
- San Bernardino County Racial Equity Committee for the San Bernardino Council of Governments
- San Bernardino Countywide Oversight Board

In addition, I am the current Chair for the Southern California Water Coalition's Board of Trustees as well as Co-Chair of its Task Force for Water Equity, Access, and Affordability.

**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**

**What special skills, talents, or experience (including volunteer experience) do you have?
(Response Required)**


Aside from being Mayor for the City of Fontana, I am currently the District Director for the Second Supervisorial District for San Bernardino County and I coordinate district services and communications with constituents, I oversee community outreach efforts, as well as supervise district staff.

In addition to local-level involvement, I have served on the State Park Commission and as a trustee of the United States Conference of Mayors, an official non-partisan organization of cities in the United States with populations of 30,000 or more. I have also served in community organizations such as Water/Recycled Water Projects and Development Processing for New Communities, Casa Colina Rehabilitation Hospital Board of Directors, and the Upland YMCA Board of Directors.

What is your overall vision for SDRMA? (Response Required)

My vision for SDRMA is to ensure that it continues to be the best risk management agency, who will continue to listen and communicate with its member agencies. I would strive to make sure SDRMA continues to provide excellent service, provide educational and training programs that are beneficial to its member agencies, and offer more resources that add value to its members. Lastly, I want to make sure SDRMA operates in the highest ethical manner with complete transparency.

I certify that I meet the candidate qualifications as outlined in the SDRMA election policy. I further certify that I am willing to serve as a director on SDRMA's Board of Directors. I will commit the time and effort necessary to serve. Please consider my application for nomination/candidacy to the Board of Directors.

Candidate Signature  Date 4/25/2023

**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**

This information will be distributed to the membership with the ballot, "exactly as submitted" by the candidates – no attachments will be accepted. No statements are endorsed by SDRMA.

Candidate* Jesse D. Claypool
District/Agency Honey Lake Valley Resource Conservation District
Work Address USDA Service Center 170 Russell Avenue, Suite C, Susanville, CA 96130
Work Phone 530-257-7271 Cell Phone 530-310-0232

*The name or nickname and any designations (i.e. CPA, SDA, etc.) you enter here will be printed on the official ballot, exactly as submitted.

Why do you want to serve on the SDRMA Board of Directors? (Response Required)

My interest for being on the SDRMA Board of Directors is because I believe it is imperative for there to be a knowledgeable and experienced voice on the Board with the perspective of the small to mid-size special district. In addition, I am eager to continue working with SDRMA staff and fellow Board members, providing relevant and affordable solutions, available to all special districts.

What Board or committee experience do you have that would help you to be an effective Board Member? (SDRMA or any other organization) (Response Required)

The vast amount of understanding and experience that I've gained as a current member of the SDRMA Board of Directors will undoubtedly aide as I continually strive to be an increasingly effective member of the SDRMA Board of Directors going forward.

In addition to being a current SDRMA Board member, I am currently Chairman of the Board for the Honey Lake Valley Resource Conversation District and a board member of a Regional Water Managment Group. Previously I have served on the following, Lassen County's Civil Grand Jury, two terms, CSDA Professional Development committee, two terms, Janesville Union School District trustee, Technical Advisory Committee for the prevention of violence against schools K-12, two terms, and CSDA Member Services committee, two terms.

**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**


What special skills, talents, or experience (including volunteer experience) do you have? (Response Required)

I have attended various board member trainings and completed leadership and governance classes, including the following; CSDA's Extraordinary Leadership Training and CSDA's Special District Leadership Academy. I have received CSDA's Recognition in Special District Governance certificate and successfully completed Executive Education in Public Policy at University of Southern California, Sol Price School of Public Policy.

What is your overall vision for SDRMA? (Response Required)

My continued vision for SDRMA is to be effective within the communities they serve. With focused attention to affordable solutions, administered by a team of highly dedicated professional staff, SDRMA will continue to be an industry leader providing affordable solutions to its members.

I certify that I meet the candidate qualifications as outlined in the SDRMA election policy. I further certify that I am willing to serve as a director on SDRMA's Board of Directors. I will commit the time and effort necessary to serve. Please consider my application for nomination/candidacy to the Board of Directors.

Candidate Signature  Date 4/20/2023

**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**

This information will be distributed to the membership with the ballot, "exactly as submitted" by the candidates – **no attachments will be accepted**. No statements are endorsed by SDRMA.

Candidate* Sandy Seifert-Raffelson
District/Agency Herlong Public Utility District
Work Address P O Box 115, Herlong CA 96113
Work Phone (530)827-3150 Cell Phone (530)310-4320

*The name or nickname and any designations (i.e. CPA, SDA, etc.) you enter here will be printed on the official ballot, exactly as submitted.

Why do you want to serve on the SDRMA Board of Directors? (Response Required)

I am a current Board member of SDRMA and feel that I have added my financial and general manager background to make a better-informed decision for SDRMA members. As a Board member, I continue to improve my education of insurance issues and look forward to representing small District's and Northern California as a voice on the SDRMA Board. I feel I am an asset to the Board with my degree in Business and my 35 plus years' experience in accounting and special districts.

I understand the challenges that small District face every day when it comes to managing liability insurance, worker's compensation and health insurance for a few employees with limited revenue and staff. My experience in small districts give me an appreciation of the importance of risk management services and programs, especially for smaller District that lack expertise within.
I feel I am an asset to this Board, and would love a chance to stay on 4 more years!

What Board or committee experience do you have that would help you to be an effective Board Member? (SDRMA or any other organization) (Response Required)

While serving on the SDRMA Board, I have been privilege to be Secretary of the Board, Vice-President and currently President. I have served on CSDA's Audit and Financial committee's for several year; I have served on the SRLF Board and current President; Northeastern Rual Health Clinic Board; Fair Board; School and Church boards; 4-H Council and leader for 18 years; and UC Davis Equine Board. In the past 30 years, I have learn that there is no "I" in Board and it can be very rewarding to part of a team that makes a difference for others.

As part of my many duties working for Herlong PUD, I worked to form the District and was directly involved with LAFCo, Lassen County Board of Supervisors and County Clerk to establish the initial Board of Directors and first policies for HPUD. I have administered the financial portion of 2 large capital improvement projects with USDA as well as worked on the first ever successful water utility privatization project with the US Army and department of Defense. I am currently in the middle of a 14 million infrastructure project with SRF monies. I am also the primary administrator of two federal contract for utility services.

**Special District Risk Management Authority
Board of Directors
Candidate's Statement of Qualifications**

What special skills, talents, or experience (including volunteer experience) do you have? (Response Required)

I have my Bachelor's Degree in Business with a minor in Sociology. I have audit small districts and worked for a small district for almost 18 years. I am a good communicator and organizer. I have served on several Boards and feel I work well within groups or special committee. I am willing to go that extra mile to see things get completed.

I believe in recognition for jobs well done. I encourage incentive programs that get members motivated to participate and strive to do their very best to keep all losses at a minimum and reward those with no losses.

With HPUD and with SDRMA both boards and employees have worked hard to receive their District of Distinction and their District of Transparency.

I feel I am a good leader with people skills that can accomplish what is necessary to keep a District or JPA moving forward.

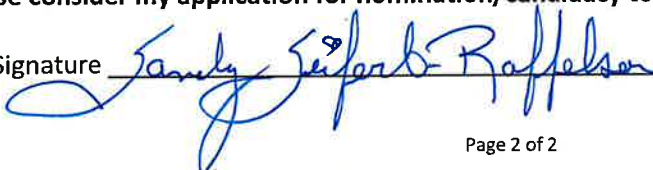
What is your overall vision for SDRMA? (Response Required)

SDRMA Staff and Board work together to bring Special Districts affordable insurance for the pool they serve. By

listening to the needs of all California Special Districts and meeting those needs at a reasonable price that Special Districts can afford. I would continue advocating for these continued efforts and rewarding continue education for all Districts and employees.

I see SDRMA pool continuing for centuries and serving those needs.

I certify that I meet the candidate qualifications as outlined in the SDRMA election policy. I further certify that I am willing to serve as a director on SDRMA's Board of Directors. I will commit the time and effort necessary to serve. Please consider my application for nomination/candidacy to the Board of Directors.

Candidate Signature  Date 4/17/2023



Board Meeting Agenda Item Summary

July 12, 2023

ITEM #:	07A	ITEM TYPE:	<input checked="" type="checkbox"/> Discussion <input type="checkbox"/> Action <input type="checkbox"/> Both
SUBJECT:	President and Board member reports.		
RELATION TO STRATEGIC PLAN:	<input checked="" type="checkbox"/> N/A <input type="checkbox"/> Advances Goal/Objective #'s: _____		

RECOMMENDED ACTION:

None.

SUMMARY:

This item provides an opportunity for individual Board members to provide a verbal report of District-related activities undertaken in the previous month.

FINANCIAL IMPACT:

None.

ATTACHMENTS:

None.



Board Meeting Agenda Item Summary

July 12, 2023

ITEM #:	07B	ITEM TYPE:	<input checked="" type="checkbox"/> Discussion <input type="checkbox"/> Action <input type="checkbox"/> Both
SUBJECT:	Fire Chief's report.		
RELATION TO STRATEGIC PLAN:	<input checked="" type="checkbox"/> N/A <input type="checkbox"/> Advances Goal/Objective #'s: _____		

RECOMMENDED ACTION:

None.

SUMMARY:

This item includes a written and verbal report from the Fire Chief regarding general operations of the District's Fire Division over the previous month.

FINANCIAL IMPACT:

None.

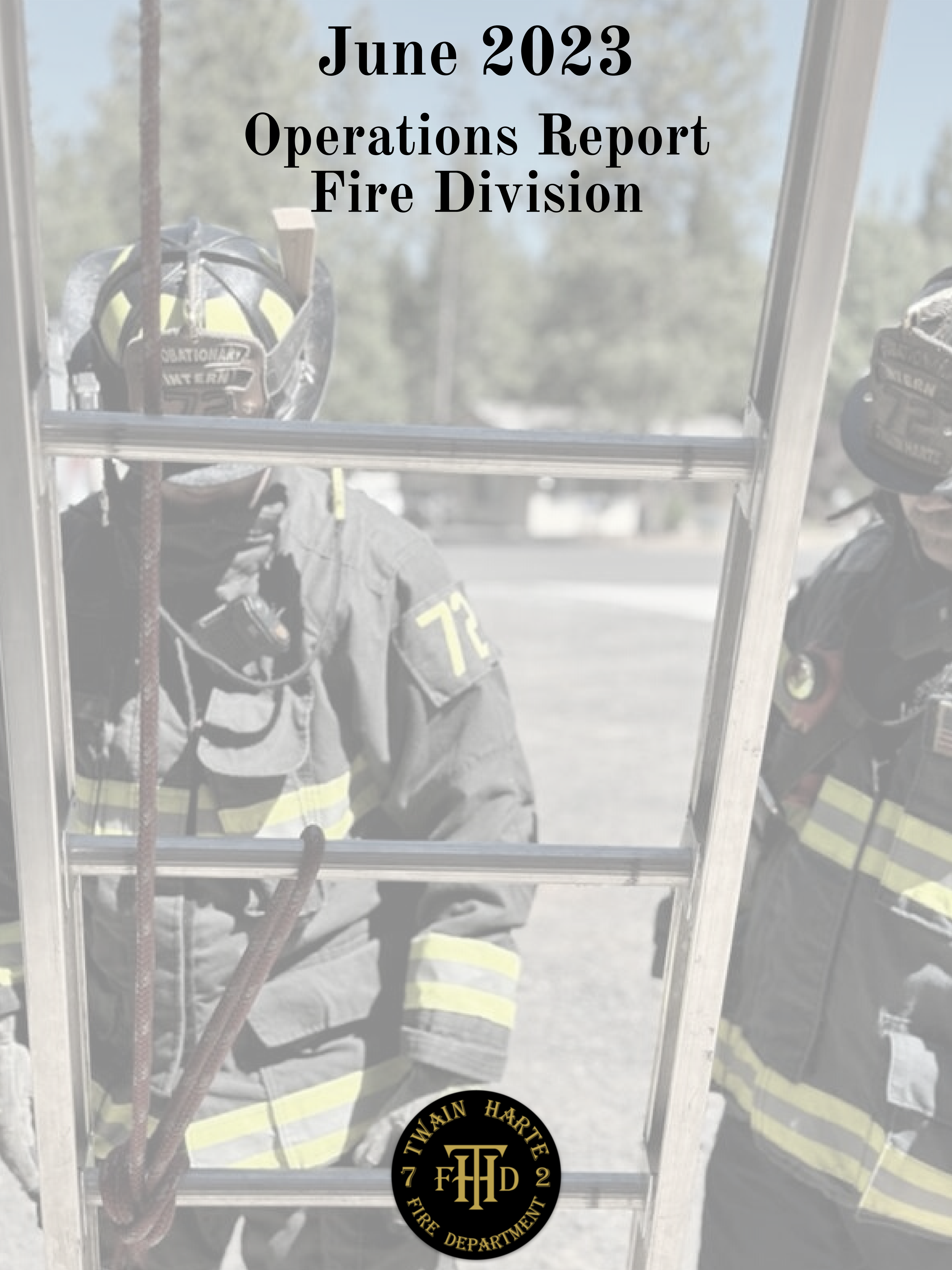
ATTACHMENTS:

- Fire Operations Report
- CERT Monthly Newsletter

June 2023

Operations Report

Fire Division



STAFFING

Full-Time Captains-2

Intern Operators-2

Relief Captains-3

Reserve Firefighters-1

Intern Firefighters-1



Twain Harte Outhouse Race 2023



**Congratulations, THFD Outhouse Race Team,
Ol Duce. The team secured the Golden plunger
award for 3rd place.**



FLEET/FACILITIES



Sindalar Tree Service completed removing all hazardous trees from around the district office.



June Responses-25



On June 21st, E-721, C-720 responded to a vehicle accident involving a commercial structure. No significant damage to the building. The patient was not injured.



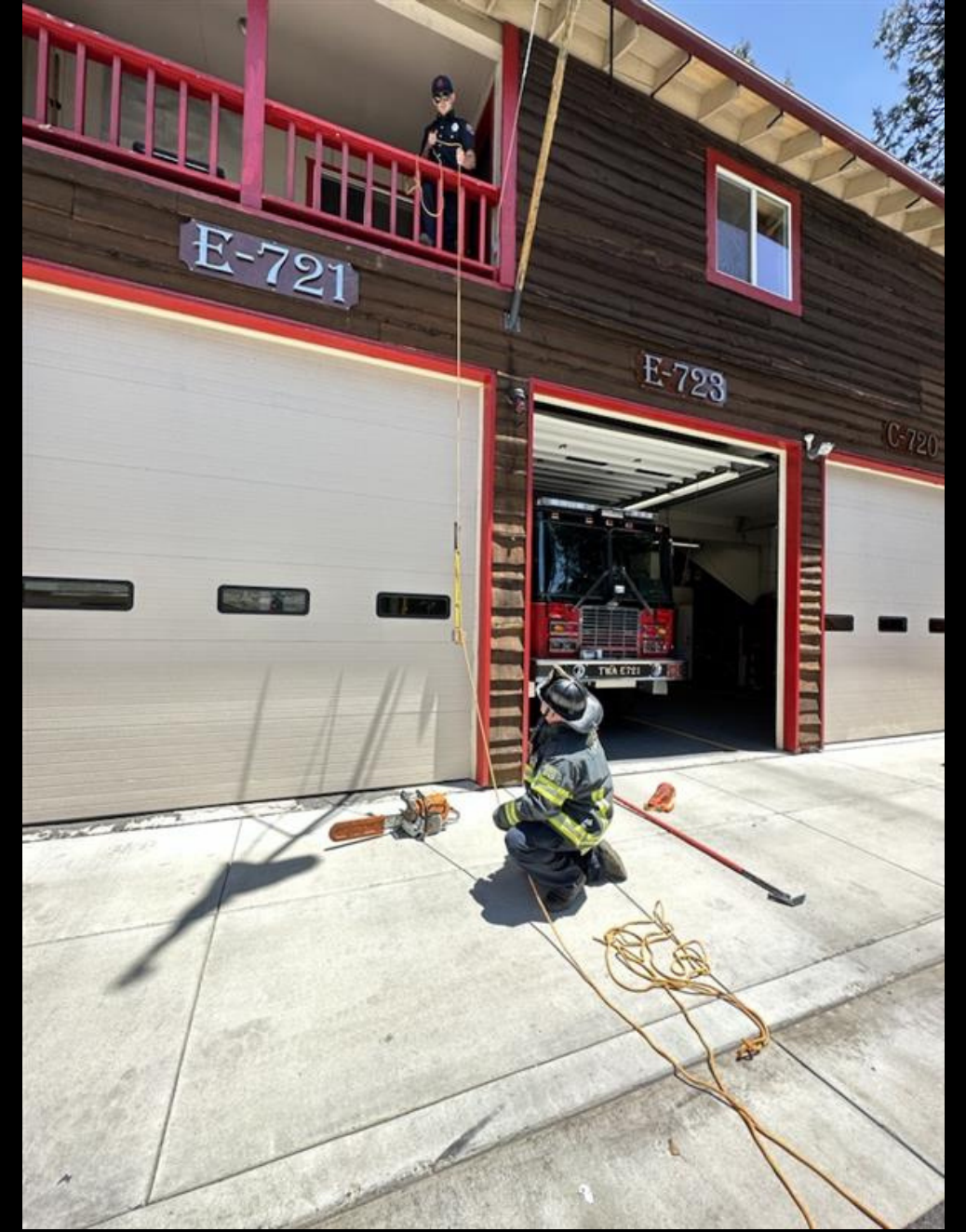
On June 21st, WT-721 and C-720 responded to a Vegetation Fire in Jamestown. WT-721 was committed to the incident till the following day.



On June 27th, E-721 and C-720 responded to a motorcycle accident involving two patients. Both of the riders sustained minor injuries.



June Training Hours-200

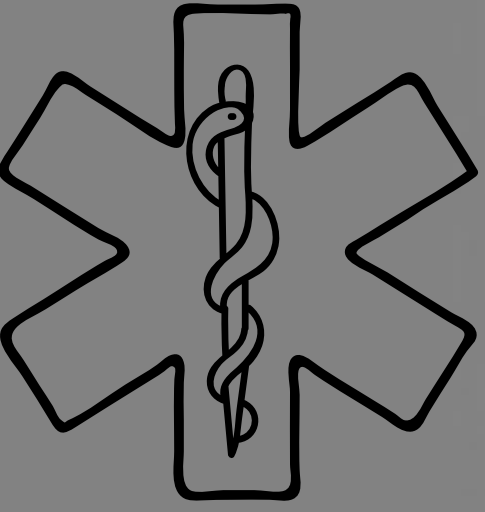


This month all shifts started training on Wildland Fire scenarios. Crews are working on all Wildland Firefighting fundamentals, including Progressive hose lay's, mobile attacks, hand line construction, and pumping evolutions.



THFD INCIDENT STATISTICS

June 2023.



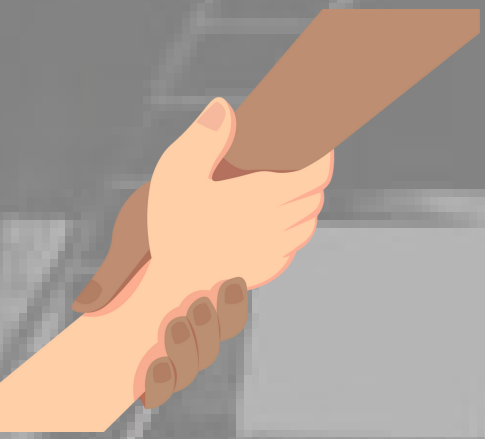
EMS Incidents-50%



Grass Fires -4%



Structure Fires -4%



Good Intnet- 21%



False Alarms 17%



Hazardous Conditions 4%

Responses by District June 2023



Twain Harte District-64%



Tuolumne County Fire-24%



Cal Fire-4%



Mi Wuk Fire-4%



USFS-4%



SERVING OUR COMMUNITY

MONTHLY UPDATE

June 2023

Mary Schreiner, Editor & PIO
twainhartecert@gmail.com

Contents:

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Flags Flying 4th of July	Page 6
First Aid Training	Page 7
Safety Tips for Hot Weather	Page 8
Where does the time go?	Page 9
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**VOLUNTEER,
YOU WILL LOVE IT!**



**STAY COOL
EVERYONE!**

NOTES FROM THE PROGRAM MANAGER



by Carol Hallett

I was worried that we would not get spring at all this year but instead it was just a little late. I am so happy because I absolutely love spring. It was a great month for hiking, biking, picnicking, and BBQing and we did it all.

We had a few days when winter seemed to think it was time to return, such as during the Outhouse races but we were all so ready to have fun that it did not deter us. Now that the Outhouse Race is over I can say that the event was a blast! I hope you can all join us next year.

We had a deployment this month, which is always a pleasure, along with an important training class. I wish everyone could have attended it.

The fourth of July is upon us so our flag hanging crew were out to decorate the town. I hope you all enjoy them when you drive through. They added a little something more!

We have been practicing on the radios each week and we are really hoping this group will grow. It only takes a couple minutes a week and it is so vital for communications when an emergency happens.

I hope you all have a wonderful July, heed the tips for hot weather, stay hydrated and stay cool.

SUCCESS IN THE OUTHOUSE

by Carol Hallett, Program Manager



I arrived at 6:30am to start the margarita machine and it was obvious that the gray skies were going to be raining on our parade. As a leader I needed to decide what to do, my decision...party on!

The rain came down but people did not seem to care they came anyway. The colorful umbrellas made the event even more magical.



Lets get this party started!

We could hear thunder as the huge rain drops came down, again no one seemed to mind. So we started the parade. The race carts were amazing, all unique in their own way and yet had the same criteria to race... it had to be an outhouse.



Parading the outhouses

The rain drops subsided enough for us to get started and as the fun filled the air it seemed that the skies cleared too. The race was on. Dodge Ridge won this race and we can see that Mike Dearborn was there to help them slow down.

Each race was logged on the Bracket Board by Margaret, Victoria, and Cindy. They did a fabulous job keeping it all straight. Terry Northcutt was an



Spectators arriving under gray skies

The CERT volunteers worked hard to get the event started. Directing people, blow drying the track so we can stripe the lines, registering the racers. It was a mad dash to the start but they took it all in stride. MYACT (Mountain Youth & Community Theater) was there to sing the National Anthem.



Dolan Team from Reno in the parade



Ridge Hogs

amazing Master of Ceremonies (he did not stop until the last racer won) and he kept us laughing at his puns.

The teams were lined up against one another and off they ran at full speed until after they crossed the finish line. It was exhilarating watching the speed they could get going. And I am sure the drivers felt the same way.



THFD crossing the finish line



Tot Pot Races

The big kids were not the only ones that raced that day... we also had the "Tot Pot" races. The young kids were so adorable and took the race as seriously as the older kids (adults). It was so much fun to see the joy on everyone's faces.



Skid Marks



Steaming Load



Ridge Runs

The event was successful on many levels. There are too many people to thank but I do want to recognize a few: Terry Northcutt (who put countless hours into this event before, during and after), Meadow Frago (who worked so hard to bring in vendors and promote the event), Carolle & Brian (who traveled here just to help), all the craft and food vendors, our Fire Chief, Neil Gamez (who BBQ'd all day), all the racers (they put so many hours into creating their beautiful outhouses) and all of the volunteers. Without these people the event would have been a flop.

We are looking forward to next year!

THE WINNERS ARE...



First Place: Dung Fu from Twain Harte, CA



Second Place: Eppy House from Twain Harte, CA



People's Choice: Moose Turd



Turd Place: Ace in the Hole from Reno NV



THFD winners of the "Golden Plunger Award"



Next years event:

Mark your calendars for

June 1st, 2024

BANNERS CAN FLY HIGH AGAIN

by Mike Mandell, Team Leader



The Twain Harte Rotarian group gave us a call and we answered with a resounding "yes". Rick Remet and Billy Baldwin rented a lift so that they could take down the cable, fix it and put it back in place. To do this we were asked to stop the traffic. We closed Joaquin Gully between Meadow and Cedar.

It only took a couple of hours and we had a great crew on site. Now the event banners can proudly fly high again.



Lise Lemonnier: stopping traffic



Carol Hallett: Asking questions



Cindy Howell: stopping traffic



HEAT EXHAUSTION	OR	HEAT STROKE
Faint or dizzy		Throbbing headache
Excessive sweating		No sweating
Cool, pale, clammy skin		Body temperature above 103° Red, hot, dry skin
Nausea or vomiting		Nausea or vomiting
Rapid, weak pulse		Rapid, strong pulse
Muscle cramps		May lose consciousness
<ul style="list-style-type: none"> • Get to a cooler, air conditioned place • Drink water if fully conscious • Take a cool shower or use cold compresses 		<p style="font-size: 2em; font-weight: bold; color: white;">CALL 9-1-1</p> <ul style="list-style-type: none"> • Take immediate action to cool the person until help arrives

FLAGS GOING UP FOR THE FOURTH OF JULY

by Lise Lemonnier, Planning Section Chief



It is really easy to say, I will do it! But then you realize you need help to make it happen. I sent out the request and they showed up again. Some of the regular crew could not make it... it must be summer but we had a fabulous team to hang the flags.

We added buntings this time and it really dressed the town up even more. I was supposed to take pictures but we all showed up and then ran in different directions and just got the work done.



Ed Proctor, Mike Dearborn & Allan Hancock

The flags are up until July 5th. If you want to join in the fun, come to town at 9am. We meet at the kitchen store and head out from there. The taking down is quick so don't be late.

It is a fun way to make a small change that really shows in the town and everyone can see.



Hot Dog



Mike Mandell, Mary & Mike Dearborn

HAPPY FOURTH OF JULY

Independence Day, also called Fourth of July or July 4th, in the United States, is the annual celebration of nationhood. It commemorates the passage of the Declaration of Independence by the Continental Congress on July 4, 1776.

For each of us it means something different and is celebrated in different ways. So whether you go to see a parade, visit with family, or BBQ at the park, we hope you enjoy this holiday and make special memories.



Remember that all fireworks are illegal in Tuolumne County, even those labeled "safe and sane", due to high fire danger.

Be fire safe!

FIRST AIDE TRAINING ACCOMPLISHED

by Margaret Lawrence, Training Officer
ghost writer: Carol Hallett (because Margaret is traveling)



We are so blessed to have so many talented people as part of THA-CERT volunteers. Two great examples of that are Michelle Wagner & Randie Revilla, who were instructors for our First Aid training class this week. I worked with them to get things in place knowing that I would be out of town during the actual event... so Carol Hallett, Mike Mandell, & Lise Lemonnier took my place (yes, it took three of them to take my place :-)).

The room filled up with THA-CERT members, community members and a couple people from Groveland CSU. Each person came specifically to ensure that when an emergency happens they can help themselves, their families and the community until first responders arrive.

The subjects covered included how to stop a bleed, bandaging techniques, splinting, heat exhaustion & stroke, to name a few.



These talented instructors balanced the training with lecture and practice. Each group was observed by seasoned CERT volunteers to ensure the techniques were practiced correctly.



There was even a timed event to show how quickly a person could apply a tourniquet on oneself. Leo Marroquin was so fast no one else wanted to challenge him.



Margaret's campsite during her vacation

SAFETY TIPS FOR HOT WEATHER

by John Buckingham, Safety Officer

Here it comes, the hot weather is upon us. Here are a few quick tips to help you get through it with a little more comfort.

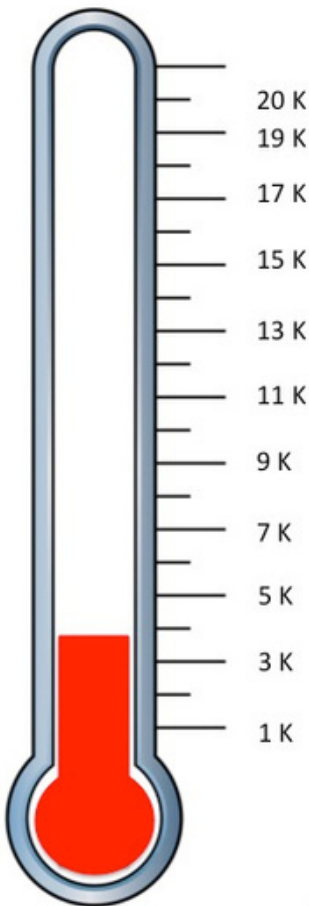
- 1) Wear loose, lightweight, light-colored clothes
- 2) Use your oven less to reduce heat in the home
- 3) If you are outside seek shade
- 4) Drink plenty of fluids to stay hydrated
- 5) Try to avoid high-energy activities outside, during mid-day heat
- 6) Never leave people or pets in a closed car on a warm day
- 7) Take cool showers or baths
- 8) Cover windows with drapes or shades
- 9) Identify places in your community where can go to cool down such as libraries or cooling stations
- 10) Learn to recognize signs of heat illness



Stay cool!

GOAL!

Lucas Device



Hydration for Firefighters

With the changing of the weather and all the brush that grew this spring we anticipate that the fire season will start soon. With that in mind the Fire Association purchased water (17 cases) and Gatorade (12 cases) for THFD. We want to make sure that we are prepared and that our firefighters are well cared for.

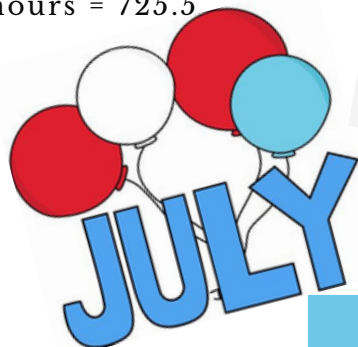
The Fire Association and THA-CERT are working hard to acquire a LUCAS device for our community. We are having many fund raisers this summer to help us achieve that goal. The Outhouse Race was one of those events. We profited approximately \$4,000. We need \$20K for the purchase. Your support can help us with this cause. If you can donate, it would be greatly appreciated and tax deductible. We will update this graphic in the newsletter to show how we are progressing. Thanks for your generous support.

WHERE DOES THE TIME GO?

by Lise Lemonnier, Planning Section Chief

The total THA-CERT volunteer hours for June are:

Administration = 510
Training = 65.5
Deployment = 150
Total June hours = 725.5



Events

Visit Tuolumne County:

<https://www.visittuolumne.com/events>

Twain Harte Chamber of Commerce:

<https://www.twainhartec.com/events>

Training

July

No training

August

August 26, 2023

Go Bag, Emergency Kit & First Aid Kit demo

0900-noon

Location: Community Center
Manzanita Dr, Twain Harte
(based on the completion of the remodel)

Save The Date!

August

August 1, 2023

National Night Out with Tuolumne County Sheriff

Eproson Park, Twain Harte, CA

Meetings

THCS Board Meeting

<https://www.twainhartecsd.com/board-meetings>

Wednesday, July 12, 2023, 9:00 am



THA-CERT has several booths that we run as fundraisers. If you would like to volunteer contact us at : twainhartecert@gmail.com



Radio Net

Join the Twain Harte Radio Net. We meet twice a week. Wednesday at 7:00pm and Sunday at 9:00am. If you want to borrow a radio to test, we have some available; once you test it, you should purchase one for yourself. Each of you should be on this net.

CERT & Fire Association Board Meeting
Thursday, July 13, 2023, 9:30 am

We hope you enjoy this month's issue. Our goal is to provide information to the community, focusing on safety and health. If you have a suggestion for future articles, please contact twainhartecert@gmail.com for consideration of the topic by the board.



Board Meeting Agenda Item Summary

July 12, 2023

ITEM #:	07C	ITEM TYPE:	<input checked="" type="checkbox"/> Discussion <input type="checkbox"/> Action <input type="checkbox"/> Both
SUBJECT:	Operations Manager's report.		
RELATION TO STRATEGIC PLAN:	<input checked="" type="checkbox"/> N/A <input type="checkbox"/> Advances Goal/Objective #'s: _____		

RECOMMENDED ACTION:

None

SUMMARY:

This item includes a written and verbal report from the Operations Manager regarding general operations of the District's Operations Division over the previous month. The Operations Division is responsible for water, sewer, and parks and recreations services.

FINANCIAL IMPACT:

None.

ATTACHMENTS:

- Operations Manager Report



TWAIN HARTE CSD OPERATIONS REPORT

What's New

- Tuolumne County Board of Supervisors meeting.
- Meadows Park Pre-Bid Meeting



- Annual 2022 Consumer Confidence Report (CCR) is completed. CCR's may be required on a biannual basis.



Water/Sewer/Park Division

For June 2023

Board Meeting 7/12/23

Highlights



Water

- Shadybrook Reservoir lake weed and algae control operations are underway using small aluminum boat. We are accepting ideas for boat names.
- MG #2 Tank rehab status: Roof is off and supports are being removed.



- Pavement Patches are complete for the fiscal year
- 3 service line leaks repaired and 1 main line break.
- Black Oak #3 tank leak on the floor of the tank has been repaired.



Sewer

- Vast majority of all the I&I assessment manholes are complete.
- Met with TUD to discuss collections operations improvements.



Parks and Recreation

- Sinkholes status: The county has selected a contractor for the work and is pending a start date.

- New Ballfield lights and Scoreboard are installed. Scoreboard now has the ability to keep score wirelessly.





Vehicles and Equipment

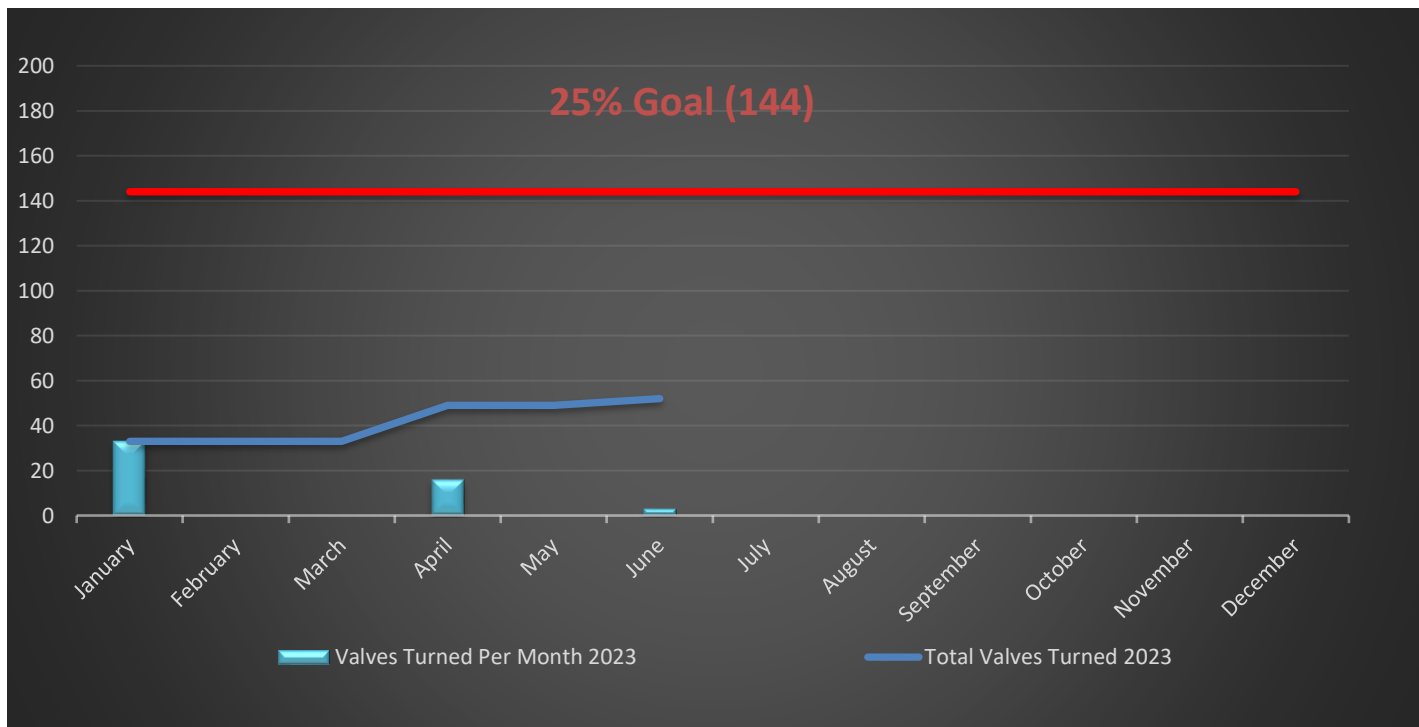
Nothing new to report.

Water, Sewer and Parks Statistics

Water

- Number of customer service calls were average for this time of year (25-45) for a total of 37.
- 1 USA North Dig Alerts marked out (context in development).
- Valves inspected and maintained out of 575: 52 or 9.0%.

(Context: 49 were inspected and maintained by this time last year).

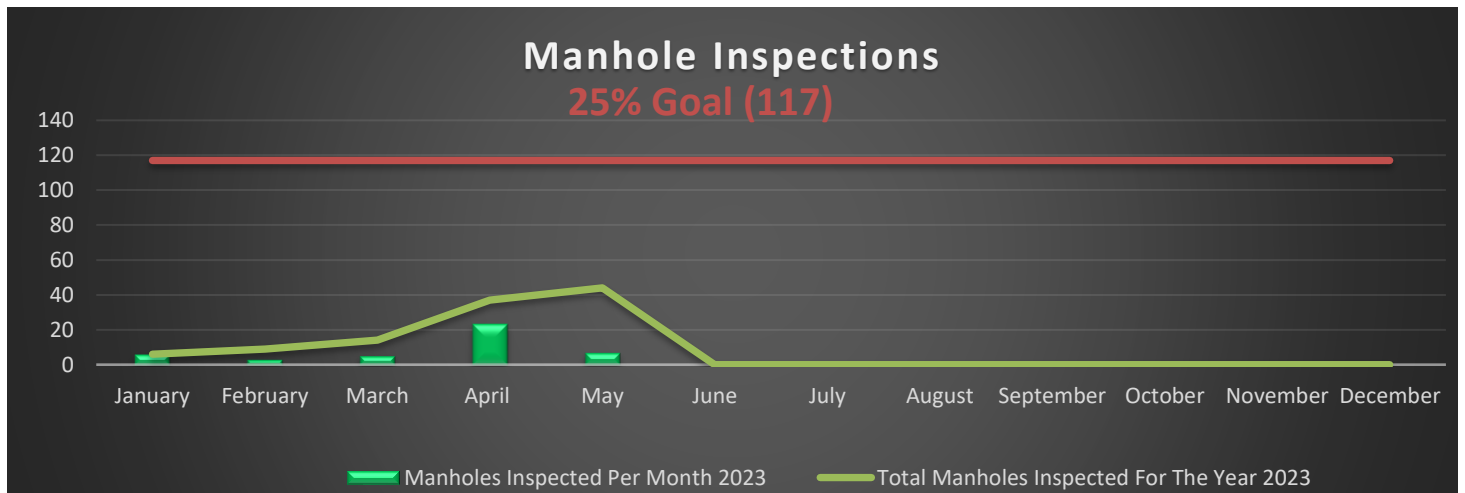


Sewer

- Number of customer service calls were above average for this time of year (1-10) for a total of 1.
- Sewer main footage cleaned out of 142,072': 33,352' or 23.5%. (Context: 39910' were cleaned by this time last year with an annual goal of 25% cleaned).

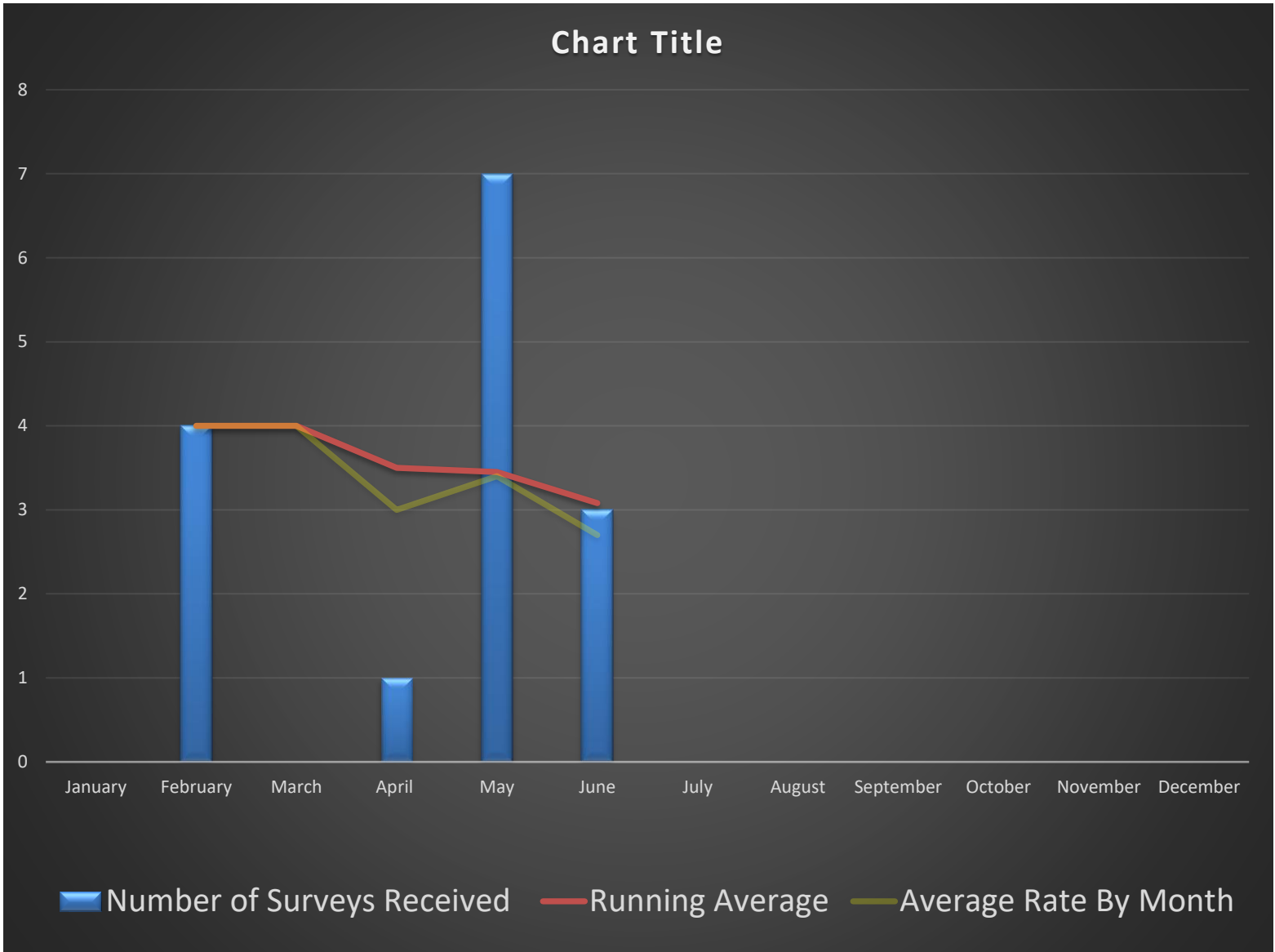


- Manholes inspected and maintained out of 468: 44 or 9.4%. (Context: 86 were cleaned by this time last year with an annual goal of 25%).



Parks

- Number of Parks surveys submitted for June was 3.



Year: 2023

Month	Treatment Plant (Gal)	Well #1 (Gal)	Well #2 (Gal)	Well #3 (Gal)	Total Recycled (Gal)	Total Production (Gal)	2013 Total Production (Gal)	Percentage Conserved (%)	Rain (inches)	Snow (inches)
Jan	4,323,056	662,674	1,734,171	104,686	554,865	6,824,587	8,304,262	17.82%	14.53	7.63
Feb	4,903,690	0	0	0	376,325	4,903,690	5,836,362	15.98%	1.46	77
Mar	5,518,276	708,141	1,364,973	0	456,740	7,591,390	5,776,198	-31.43%	15.95	21.26
Apr	6,407,049	0	0	0	430,598	6,407,049	6,737,931	4.91%	0.38	0.52
May	5,932,501	308,793	1,318,443	0	467,854	7,559,737	9,624,851	21.46%	2.43	0
Jun	8,598,359	0	0	0	450,852	8,598,359	11,912,958	27.82%	0.33	0
Jul						0				
Aug						0				
Sep						0				
Oct						0				
Nov						0				
Dec						0				
Total	35,682,931	1,679,608	4,417,587	104,686	2,737,234	41,884,812	48,192,562	13.09%	35.08	106.4



Board Meeting Agenda Item Summary

July 12, 2023

ITEM #:	07D	ITEM TYPE:	<input checked="" type="checkbox"/> Discussion <input type="checkbox"/> Action <input type="checkbox"/> Both
SUBJECT:	General Manager's report.		
RELATION TO STRATEGIC PLAN:	<input checked="" type="checkbox"/> N/A <input type="checkbox"/> Advances Goal/Objective #'s: _____		

RECOMMENDED ACTION:

None.

SUMMARY:

This item includes a written and verbal report from the General Manager regarding overall District operations and operations of the District's Administration Division over the previous month.

FINANCIAL IMPACT:

None.

ATTACHMENTS:

- General Manager's Report

GM REPORT

July 12, 2023



ADMIN ACTIVITIES

- TH Meadows Park Bidding
- Accessory Dwelling Unit Demand Analysis
- Million Gallon Tank #2 Construction
- FEMA Storm Damage Reimbursement Coordination
- Annual Employee Evaluations
- Employee Recruitment – Park, Operator 1, Captain
- Records Retention, Reorganization and Purging

CAPITAL PROJECTS

Motor Control Center (MCC) Upgrade

Budget: \$185,000

Construction submittals to replace the MCC at the water treatment plant have been reviewed and approved. Work was scheduled to take place in November 2023; however, manufacturer delays may push installation to March 2024 during low water demand months.

Twain Harte Meadows Park

Budget: \$2,600,000

A grant-funded project to build a new, community-designed park next to Eproson Park. Bids are due today with construction set to begin later this summer and be completed by late summer 2024.

Million Gallon Tank #2 Rehabilitation

Budget: \$1,275,000

Paso Robles Tank, Inc. was awarded this grant-funded project to replace tank roof and recoat the tank. Construction has begun and is anticipated to be complete in September 2023.

Tennis/Pickleball Court Improvements

Budget: \$295,000

Expansion/resurfacing of the pickleball courts with a sport grid surface and resurfacing of the tennis courts with a clay surface is currently in design. Pickleball construction is anticipated in fall.

Community Center Improvements

Budget: \$40,000 Fire / \$40,000 Park

A project to remodel the kitchen and provide ADA bathrooms has begun and is anticipated to be complete by August.

MEETINGS OF INTEREST

- 6/14 TUD Sewer Coordination Meeting
- 6/27 TH Meadows Pre-Bid Meeting
- 7/1 TH Homeowners Annual Meeting
- 7/12 TH Meadows Bid Opening
- 7/18 Special Board Meeting

PLANNING PROJECTS

Water System Evaluation/Analysis

Budget: \$777,151

Hydraulic model, water loss analysis and risk assessment and identification/prioritization of capital projects is complete. Design of Sherwood Forest water lines replacement is nearing 60%.

FUNDING OPPORTUNITIES

FEMA SAFER GRANT - \$2.7M

Full-Time Firefighters / Award: September 2023

MULTI-BENEFIT DROUGHT GRANT - \$650K

Turf Replacement / Award: Spring 2023

MULTI-BENEFIT DROUGHT GRANT - \$950K

Shadybrook Silt Removal / Award: Spring 2023

MULTI-BENEFIT DROUGHT GRANT - \$1.7M

Water Line Replacement / Award: Spring 2023

STATE REVOLVING FUND - \$4.5M

TH Pipeline Project / Award: Fall 2023

PROP 68 RURAL RECREATION - \$1.25M

TH Meadows Park / AWARDED

MULTI-BENEFIT DROUGHT GRANT - \$1.275M

MG Tank #2 Rehab / AWARDED