

# ADU Best Practices Guidebook

2nd Edition 7/12/2022

## 2021 Webinar Series Summary

In 2021, the Casita Coalition hosted a series of Best Practice webinars featuring local jurisdictions and other agencies statewide that are embracing the small housing movement and finding innovative ways to make small housing work in their communities. As a coalition of members who share a belief that small, naturally affordable homes can create a more resilient and inclusive California, we're thrilled to share the creativity of these innovators. In this evolving field, any findings in this guidebook should be considered as a snapshot in time, therefore we invite updates, comments and suggestions for ADU best practice inclusions for its next edition. With gratitude for the passion and commitment of our members and webinar participants.



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[casitacoalition.org](http://casitacoalition.org)

– Denise Pinkston, President, Casita Coalition

Thanks to the following jurisdictions and agencies who generously shared their best practices and lessons learned.

- City of San Diego
- County of Sonoma
- City of San Jose
- City of Los Angeles
- City of Pasadena
- City of Sacramento
- City of East Palo Alto
- City of San Francisco
- County of San Mateo
- City of Oakland
- Finance Working Group
- Hello Housing
- Napa Sonoma ADU Center
- SOUP
- EPA Cando
- City Systems
- Keys to Equity
- Home for All

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### CONTENTS

Selected quotes .....	2
Introduction to the three P's.....	3
POLICY Best Practices .....	4
Pre-approved plans.....	5
PUBLIC INFORMATION Best Practices.....	6
Website tips.....	7
PROCESS Best Practices .....	8
Moving the Needle.....	9
Results .....	10
Affordability Strategies.....	11
Links & Resources.....	12
Appendix A: City of San Diego ADU Bonus.....	13
Appendix B: Webinar Summaries & links .....	14

Steve Hansen, Sacramento  
City Council Member  
(former)

**“It did take a partnership between the elected officials...to give staff the comfort to lead the way in making the policy changes. It took great staff, starting with the city manager on down, to really revolutionize our development code to democratize housing at all levels of affordability.”**

**“What was really important was our fee structure, and other cities should really take a deep dive in how they assess fees for projects.”**

Gary Geiler, Assistant  
Director of Development  
City of San Diego

Effie Milionis-Verducci  
Communications Officer  
County of San Mateo

**“For ADU programs, start with an applicant pool 5 to 10 times larger than the number of ADUs you want to end up with.”**

**“We created a roundtable where ADU staff from each agency met frequently and we all reviewed batches of ADU permits those days. We then issued consolidated comments to applicants which were then addressed in a physical recheck meeting between the applicant and the agencies who issued comments. This really worked—we cleared the backlog.”**

Natalia Kwiatkowska  
ADU Coordinator  
City of San Francisco

# INTRODUCTION

The best practices and lessons learned that jurisdictions shared during our 2021 webinar series are of course preliminary or initial findings, as most cities and counties are only 2-3 years into the work of finding ways to encourage ADU production and outcome data is limited. We hope this guidebook can serve as a place to begin a dialogue as we continue to share ideas. We value your feedback and look forward to your comments, suggestions and questions as this living document evolves.

With some overlap, the best practice actions in this guide can be functionally categorized into the Three P's: Policy, Public-facing and Process.



## Policy

Establishes framework to encourage ADU production and prepare for applications

- State codes, local ordinance, fees
- Alignment of electeds and staff
- Incentives, bonus programs

## Public-facing

Educates, inspires and assists homeowners from curiosity to completion stage

- Outreach in community
- Online resources
- Handouts and forms



## Process

Actions that can help streamline permit review & approval

- Universal checklists & process flows
- Coordinated agency review
- Staff-applicant interactions

# POLICY

Best practices in this category help jurisdictions clarify codes, achieve staff alignment and engage elected officials to present a unified voice on ADU issues and share a mission to help homeowners get to ‘yes.’



Best Practice Action	Jurisdiction Example
Internal alignment & unified voice	<ul style="list-style-type: none"> <li>• Cities of San Jose and Los Angeles: Direction from Mayor to prioritize and expedite ADU processing</li> <li>• Sonoma County crafted a public-facing ADU mission statement—provided leadership with metrics</li> </ul>
Fee reductions & waivers	<ul style="list-style-type: none"> <li>• City of San Diego waived development impact fees, including transportation impact, facilities benefit assessment fee, general plan maintenance fee, mapping fee, regional transportation infrastructure fee (for ADUs with existing single family dwellings)</li> </ul>
Clear, simple codes and development standards	<ul style="list-style-type: none"> <li>• City of Oakland eliminated survey requirement for ADUs more than 3’ from property line and slope less than 20%</li> <li>• City of Berkeley worked with a task force to improve <u>local ordinance</u>; 20’ height now allowed outside hillside zone; no lot coverage or open space standards for any size ADU</li> </ul>
Vendor registry to help homeowners connect with ADU professionals	<ul style="list-style-type: none"> <li>• City of Los Angeles Standard Plan Program offers directory of ADUs to browse. Homeowners select from vetted <u>vendors</u>, saving time with simplified permit process</li> <li>• San Jose’s <u>directory</u> includes site-built and prefab builders—fast turnaround times for repeat plans</li> </ul>
Research and map ADU opportunities	<ul style="list-style-type: none"> <li>• City of Oakland conducted research and <u>published report</u> on existing conditions and barriers to ADU production</li> <li>• City of East Palo Alto &amp; San Mateo County conducted <u>research</u> before drafting programs to help homeowners</li> </ul>
ADU Bonus allowances boost affordable ADUs	<ul style="list-style-type: none"> <li>• City of San Diego: additional bonus ADUs in existing &amp; proposed <u>multifamily</u> dwellings</li> <li>• City of LA allows both detached and conversion ADUs with multifamily properties; City of San Francisco allows bonus ADUs on multifamily w/seismic retrofit</li> </ul>
Data-driven pilot programs	<ul style="list-style-type: none"> <li>• City of LA <u>ADU Accelerator</u> pairs senior tenants with ADU owners, city of Pasadena <u>offers loans</u> &amp; project mgmt for Housing Choice Voucher tenants</li> <li>• County of San Mateo research finds substantial numbers of <u>unpermitted</u> units—creates program to assist owners in bringing them up to code</li> </ul>

# Pre-approved Plans & Vendor Registries: What's getting traction so far

## Vendor Directories and Standard Plans

Homeowners thinking about an ADU report hesitancy around selecting professionals to work with. Having access to a vetted directory can help them make an informed choice, while reducing risk.

The Cities of Los Angeles, San Jose and others have sizable lists of vendors who have successfully submitted plans for pre-review.

Utilizing existing processes created for pools, staircases, etc, the Standard Plan approach can simplify approvals. As the LA Dept of Building & Safety website explains, 'Plans are designed by private licensed architects and engineers to accommodate various site conditions. Plans are then reviewed and pre-approved for compliance with the Building, Residential, and Green Codes. When the applicant selects an approved Standard Plan, staff reviews site-specific factors, including compliance with the Zoning Code and foundation requirements.'

Cities and counties who have commissioned ADU plans offered some lessons learned









- Homeowners making large investment seem to want at least some customization
- Plans need annual updating to keep up with code changes
- Modifications to suit site conditions require engagement with architect or other ADU pro
- Jurisdictions take on some liability when they own the ADU plans they offer
- Set realistic expectations around program so homeowners understand steps and professional help needed

## ADUs in Fire Hazard Severity Zones: City of Berkeley Case Study

ADUs in the Fire Zones present a unique challenge. The City of Berkeley addressed this by (i) creating ADU development standards more permissive than State law in much of the City (20' max height; flexibility within setbacks for existing structures and equipment) and (ii) more restrictive in high fire hazard areas where narrow hillside streets already pose a challenge for fire response vehicles (one ADU or JADU per lot, 800 sf max; no rooftop decks or extensions into setbacks or expansion of accessory structures more than 150 sf).

This response allows every homeowner to have an ADU, balancing the realities of hazard response with the need for more homes citywide.

Los Angeles Dept of Building & Safety  
Pre-Approved Standard Plans Sample

	ADU14	ADU	1 story 1 bedroom with options - HCD Approved (460 sf)	Connect Homes	Approved
	ADU15	ADU	1 story 1 bedroom with options - HCD Approved (640 sf)	Connect Homes	Approved
	ADU16	ADU	1-story, 1 bedroom with options (454 sf)	Design, Bitches	Approved
	ADU17	ADU	1-story studio with options (360 sf)	IT House	Approved
	ADU19	ADU	1-story, 2-bedroom with covered roof deck and options (934 sf)	Amunátegui Valdés	Approved
	ADU20	ADU	1-story, 1 or 2 bedroom with options (532 sf)	Escher Gunewardena Architecture	Approved
	ADU21	ADU	1-story, 1 or 2 bedroom with options (784 sf)	Escher Gunewardena Architecture	Approved
	ADU22	ADU	1-story, 1 or 2 bedroom with options using Manufactured Housing (480 sf - 800 sf)	WHY	Pending Approval

# PUBLIC INFORMATION

Jurisdictions frequently cited the importance of robust outreach programs to educate homeowners who stand to benefit most. Clear and complete online resources can save staff time and reduce frustration on all sides.



Best Practice Action	Benefits Reported	Jurisdiction Example
Targeted outreach	Raises awareness of ADU benefits, sets realistic expectations, establishes pro-ADU messaging	<ul style="list-style-type: none"> <li>● <a href="#">ADU webinars</a> hosted by Napa Sonoma ADU Center</li> <li>● County of San Mateo holds resource fairs</li> </ul>
Clear, easy to navigate website or web page	Provides audience appropriate info at each step—using graphics, visuals	<ul style="list-style-type: none"> <li>● County of San Mateo <a href="#">Second Unit Center</a></li> <li>● Napa Sonoma ADU Center <a href="#">website</a></li> <li>● County of Marin <a href="#">ADU Marin</a></li> </ul>
Handouts & checklists	Universal checklists and single issue one-pagers keep need-to-know info contained & organized	<ul style="list-style-type: none"> <li>● City of San Francisco’s checklist includes all agencies</li> <li>● City of San Jose’s <a href="#">Universal Checklist</a> is clear &amp; complete</li> </ul>
Nonprofit partnerships	Experienced partners can help with outreach, education, project management, tenant screening / leases	<ul style="list-style-type: none"> <li>● City of Oakland &amp; <a href="#">Keys to Equity</a></li> <li>● 16 jurisdictions across Napa and Sonoma counties &amp; Napa Sonoma ADU Center</li> </ul>
Financing options	To expand homeowner pool, loan programs & incentives can fill gaps	<ul style="list-style-type: none"> <li>● City of Pasadena loan programs assist homeowners who rent to HCV tenants</li> <li>● Housing Trust Silicon Valley partnered w/ cities</li> </ul>
Storytelling that inspires	Video case studies, idea books, ADU tours show relatable success stories from neighbors	<ul style="list-style-type: none"> <li>● San Mateo County inspirational <a href="#">idea book</a></li> <li>● Napa Sonoma ADU Center: <a href="#">Learn from your neighbors videos</a></li> </ul>
Online tools for first steps of learning & exploring	Permit fee calculators; cost calculators; and address lookup tools help with initial feasibility research	<ul style="list-style-type: none"> <li>● City of East Palo Alto <a href="#">permit fee calculator</a></li> <li>● Napa Sonoma ADU Center <a href="#">ADU cost calculator</a></li> <li>● San Mateo county <a href="#">multijurisdiction site</a></li> </ul>

## ADU Websites

Flow charts can help homeowners visualize a complex process and navigate site

**Getting Started**

Are you interested in building a second unit? Here's information on how to get it one.

Getting Started → Design → Permits → Construction → Move In

New state laws have made it easier than ever to build a second unit in California. Start by visiting your city to discuss your ideas. Use our calculator to learn more about costs, rents, and the value of second units.

[Learn more](#)

**I'm thinking about ADUs**

Find out what an ADU is, what types of ADUs you can build, and the ways it can support you, your family, and the community.

[Learn more](#)

**I'm ready to build an ADU**

Find out what you're eligible to build, determine your potential costs, and more in our ADU 101 series.

[Learn more](#)

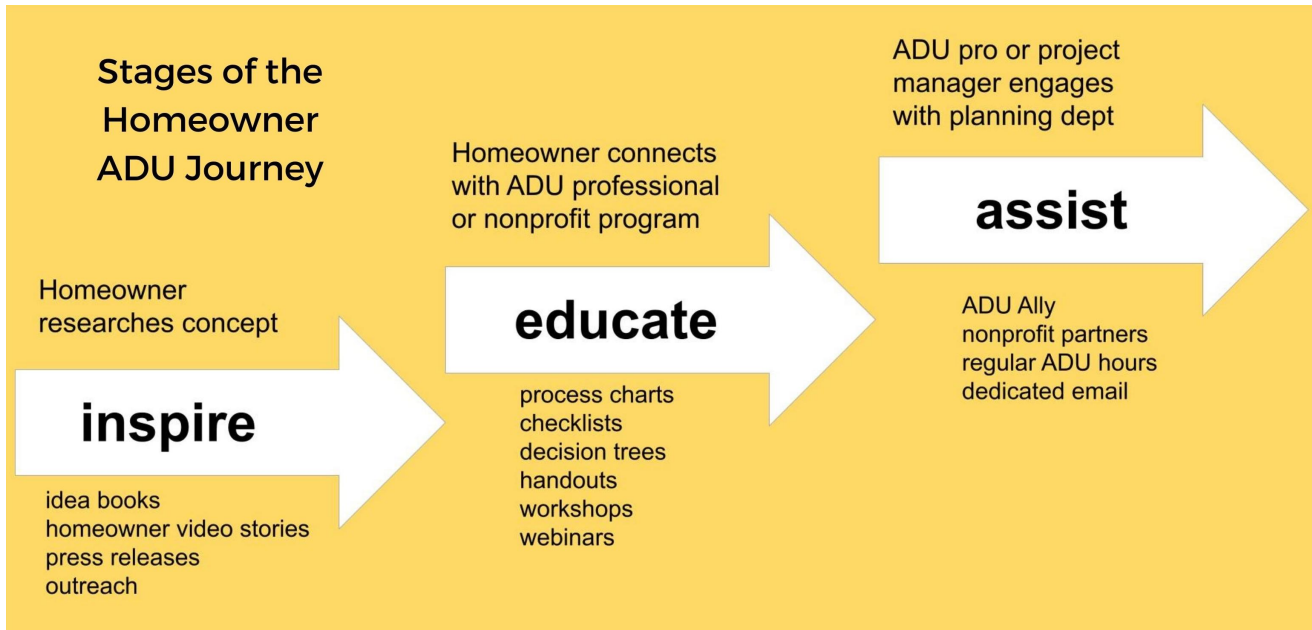
**I've built an ADU**

We want you to feel prepared to take this on. Explore the ADU process and arm yourself with information.

[Learn more](#)

Looking for the most up to date information? Check out our blog →

San Mateo Second Unit Resources Center                      Napa Sonoma ADU Center



## Sharing success stories is a key strategy



San Mateo Second Unit Resources Center

Hello Housing

What's Your Story?

There are many reasons Accessory Dwelling Units have captured the imagination of so many people in the Bay Area in recent years. Story after story shows us that adding an ADU can be the best insurance policy a homeowner could ever buy.

- Are you a Joe & Kathy?** Joe and Kathy raised their family in a home they love, but their kids can't afford to live near them anymore. They want to add an ADU for their daughter and the kids. They'll be close enough to connect every day, but they won't be stepping on Legos on the way to the kitchen.
- Are you a Eugene?** Eugene's parents are getting older. Their home is easy to fall for them now that their kids have all moved out. And with all the bedrooms on the top floor, it's not a realistic option long term. He's building them an accessible ADU in their backyard so they can enjoy their golden years, among their friends and neighbors.
- Are you a Rubi?** Rubi works full-time and is raising her seven-year-old son Carlos. While her marriage didn't work out the way she hoped, she was able to keep Carlos in the same school after her divorce, thanks to her ADU. They moved into the smaller unit, and left out the main house, which means their divorce has mortgage payments.
- Are you a Dave & Jon?**
- Are you an Alex & Lisa?**
- Are you a Gail?**

# PROCESS

While each jurisdiction’s internal workflow is unique, commonalities arose for best practices that can help streamline the ADU permitting process.



Best Practice Action	Benefits Reported	Jurisdiction Example
Expanded hours & access to permits	Pre-application meetings can foster welcoming & positive tone while setting realistic expectations	<ul style="list-style-type: none"> <li>● City of San Jose hosts ADU Tuesdays</li> <li>● Napa Sonoma ADU Center holds twice-weekly ADU hours</li> </ul>
Dedicated ADU team	Reduces need for training, helps with consistent response and interagency coordination	<ul style="list-style-type: none"> <li>● City of San Jose designated ADU Ally</li> <li>● City of San Francisco has ADU Coordinator</li> </ul>
Concurrent review, electronic plan review	Digital submission portals that allow concurrent resubmittals to each agency reduce delays	<ul style="list-style-type: none"> <li>● City of San Francisco found efficiencies with roundtable reviews of ADUS</li> <li>● City of LA uses <a href="#">ePlanLA</a> to speed processing</li> </ul>
Regular staff trainings	Keeps team updated on new online tools, resources, codes-- trains new staff	<ul style="list-style-type: none"> <li>● City of San Diego emphasizes regular trainings</li> <li>● Leadership briefings assist with public messaging</li> </ul>
Internal audit of processing timelines	Identify and address process bottlenecks-- report back to leadership	<ul style="list-style-type: none"> <li>● City of East Palo Alto found grant for audit of process</li> <li>● Interactive housing progress reports track ADU results</li> </ul>
Responsive new program design	Staff research and academic partnerships can help right-size and adjust incentives	<ul style="list-style-type: none"> <li>● City of <a href="#">LA ADU Accelerator</a> pairs senior tenants with ADU owners</li> <li>● County of Sonoma delays fee collection until tenant occupancy</li> </ul>



## Moving the Needle



Disaster recovery

The County of Sonoma allows small homes to be built within fire recovery areas that can be re-designated as ADUs later on. This helps return homeowners to their properties sooner



Movable tiny homes

City of San Jose, Fresno, LA, San Diego, Oakland and others allow movable tiny homes as ADUs—traction limited so far



Deed restrictions

Incentive programs with affordability covenants longer than a few years have faced hurdles with older and lower income homeowners looking for income and flexibility



Garage conversions

More than twice as many conversions (mostly garages) vs. new ADUs are permitted in LA. Building permit fees for a new detached ADU average \$8500, garage conversion: \$1050



One stop shops

Combining lower-cost prefab ADUs with project management help, low cost financing and pre-screened tenants is getting traction in several cities

# RESULTS—THE ADU REVOLUTION IN PROGRESS

In 2020, ADUs in CA accounted for 11.5% (13,000) of all housing permits

City of LA 21%

City of San Jose 24%

County of LA 42%

## +1158%

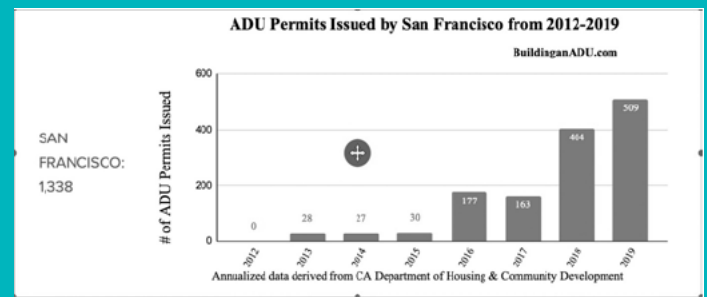
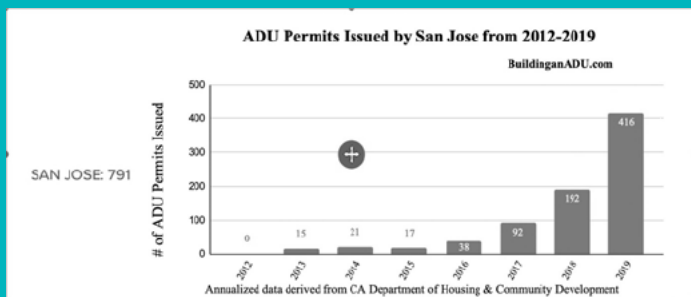
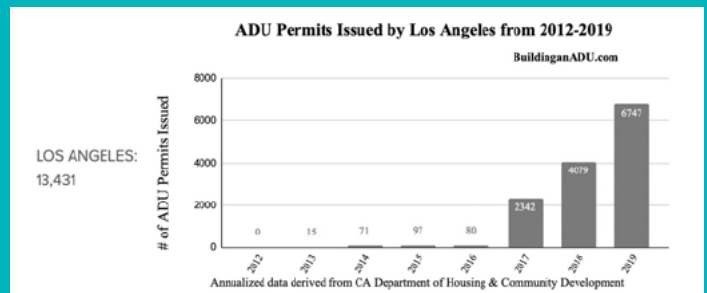
Increase in ADU permits California cities issued from 2016, the year before pro-ADU legislation was passed at the state level, to 2019.

California Dept. of Housing & Community Development

Statewide, from 2018 to 2020, nearly 23,000 ADUs have been built; estimates for 2021 indicate continued upward trend

## ADU growth centers

With 20 ADU permits for every 1,000 homes from 2017 to 2019, Los Angeles leads the state in ADU growth. Next is San Francisco, with 13.3 per 1,000 SFHs.



What do the top ADU producing jurisdictions have in common? According to ADU California, the data suggests that the following factors have high correlation with ADU numbers:

- Good access to jobs
- High percentage of single family homes
- Lower cost of construction
- Contagion effect (as more ADUs are built, awareness & adoption increase)

# EXPANDING ADU BENEFITS TO MORE CALIFORNIANS

Early adopters tend to be higher-resourced households, with additional assistance needed for lower income homeowners

From Implementing the Backyard Revolution by UC Berkeley's Turner Center for Housing Innovation: "...the ADU revolution has been slow to reach low-income homeowners of color. It will take a targeted effort at both the state and local level to meaningfully boost ADU production throughout the state and to eliminate structural barriers to ADU production so that all Californians can reap the benefits."

Public-private partnerships such as the City of San Jose with Prefab ADU and the City of Oakland's partnership with Keys to Equity have helped to bring down cost for homeowners at the lower end of the budget range.



## Tailored Outreach

Research neighborhoods where ADUs could benefit lower-income homeowners; partner with community groups and nonprofits; provide multilingual materials and project management



## Pre-development cost grants & gap funding

Speculative, upfront costs to determine ADU feasibility can stop low- resource homeowners before they begin. Look for funding for forgivable loans, grants & gap funding



## Balancing owner and tenant benefits

Some ADU homeowner assistance programs will offer affordable rents to tenants and income for homeowners, while others may focus on intergenerational wealth building by allowing market rents



## Innovations in Construction

keeping ADU costs low is key to making the rental strategy pencil out for lower-income homeowners. Innovations in off-site building systems from panelized to 3D printing are benefiting from venture capital funding and have potential to significantly advance affordability.

## Links & Resources

California Housing and Community Development [ADU resource page](#)

[HCD's ADU Handbook](#)

[CalHFA ADU Grant Program](#)

UC Berkeley Center for Community Innovation's [ADU publications](#)

[AARP ADU webpage](#)

[Casita Coalition YouTube channel](#)

[Casita Coalition Guidance memos: Garage Conversions & ADU Finance](#)

[ADU California Best Practices page](#)

[Housing Innovations Collaborative—Los Angeles R&D website](#)

[Accessorydwellings.org](#)

Southern California Association of Governments (SCAG) [ADU Planning & Development web page, study on ADUs and affordable rents](#)

Questions for HCD on interpretation: send to [adu@hcd.ca.gov](mailto:adu@hcd.ca.gov)

See link on [HCD ADU](#) page to download:

- ADU ordinance review letters sent to jurisdictions (XLS)
- ADU Technical Assistance Letters (XLS)

### Hello Housing / Bright in Your Backyard

- ADU Programs: Start with applicant pool 3x desired #
- Minimize complexity
- Don't lowball the amount of assistance low-moderate income (LMI) homeowners will need
- Pair financing with technical assistance and project management
- Have a plan to identify and vet 3rd party professionals to work with the program
- Identify a nonprofit partner with affordable housing program design experience, project management experience and financial underwriting knowledge to bring needed action and capacity to jurisdictions

### UC Berkeley Turner Center for Housing Innovation

- Pre-approved plans / vendors
- Partnerships with nonprofits, banks and community development orgs
- ADU financing
- ADU bonus programs for affordability
- Fee reduction & waivers

### Southern California Association of Governments

- Clear ordinance provisions consistent with State law
- Regulatory incentives
- Objective design standards
- Outreach and education
- Public-oriented website materials
- Standardized applications
- Streamlined permitting
- Pre-approved building plan options
- Homeowner assistance
- Affordable housing subsidies

### ADU California

(Center for Community Innovation at UC Berkeley)

- Explore areas for future State Legislation
- Work with banks and credit unions to provide more appropriate loan products, particularly for homeowners without high home equity
- Continue to move forward with legislation to encourage missing middle housing development
- Co-produce future state legislation with communities from across California's diverse regions

# APPENDIX A: CITY OF SAN DIEGO ADU BONUS PROGRAM—MULTIFAMILY

## Program Numbers To Date

- Total project applications: 46
- Total ADUs proposed: 491
- Total Affordable ADUs proposed: 217
- Total permits issued to date: 10
- Total ADUs under construction: 44
- Total Affordable ADUs under construction: 16
- Total ADUs completed: 5 (2 affordable)



## Program Features & Notes

- 15-year deed restriction at very low, low, or moderate income levels administered by San Diego Housing Commission
- Within TPA: Unlimited # of ADUs allowed after exhaustion of “by right” ADUs  
Outside TPA: One deed-restricted and one bonus market rate ADU allowed after exhaustion of “by right” ADUs
- Standard building regulations and ADU regulations apply to bonus ADUs. The theoretical number of ADUs that can be built on a lot is still constrained by all other regulations including FAR, height limits, etc.
- Existing San Diego Zoning and ADU regs allow encroachments into setbacks, and apply the same existing development regs for the underlying zone
- Deed Restriction length and levels are designed to not be overly burdensome and are consistent with state requirements under AB671
- Type and positioning (second position rather than first position) of the affordable agreement on SF zoned properties works with conventional funding mechanisms
- Ministerial approvals speed up access to affordable housing units

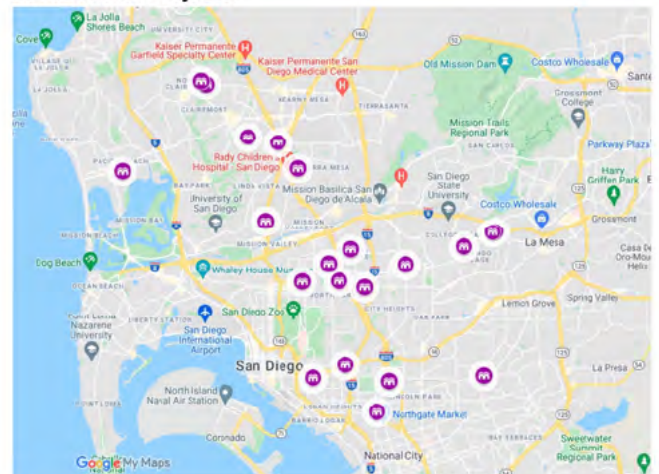
## Project Example:

First project located in a historically white, upper middle class neighborhood with less than 5 affordable housing units in the historic district. Project was submitted to the city 2/18/21, adding 5 ADUs to single family home on 6,000 sf lot:

- 1- studio garage conversion ADU by right
- 2- 1 bed/1bath 480 sf ADUs deed restricted at moderate income levels
- 2- 1 bed/1bath 480 sf Bonus ADUs at market rate

**Projected total project cost for all 5 units including all soft and hard costs: \$800k**

Locations of Projects:



With thanks to Jared Basler & the ADU Coalition

# APPENDIX B: WEBINAR SUMMARIES

## City of San Diego

[watch webinar](#)

Keynote:  
Assemblymember Phil Ting

Presenters:  
Gary Geiler—Assistant Director  
Development Svcs, City of San Diego  
Jared Basler—Maxable

Colin Parent — La Mesa City Council,  
Executive Director Circulate SD  
Heather Peters—MTC, ABAG, Principal  
Regional Housing Planner

**Summary:** San Diego attributes their success building ADUS to five key strategies.

- Outreach – The outreach program not only included homeowners in general, but focused on underrepresented communities, bankers, real estate professionals, and others
- Reduced fees – This saves homeowners between \$25,000 and \$50,000. They also have clear information about what fees are likely to be
- More permissive standards – Specifically, they allow ADUs up to 1,200, 0 foot setbacks and three stories in height
- Clean code – San Diego staff worked to simplify local codes, trained new staff and offered regular trainings to keep response consistent
- Better processing – San Diego has designated ADU staff and office hour where they answer questions or provide real time review
- They also offer a density bonus program that allows developers to a bonus ADU if they also provide an affordable ADU. Near transit, owners can add as many density bonus ADUs as will fit on the lot. The ADU has a 15 year deed restriction

**Sponsored by the State of California’s Department of Housing and Community Development**

## County of Sonoma & Napa Sonoma ADU Center

[watch webinar](#)

Keynote:  
Senator Mike McGuire

Presenters & Panelists:  
Katrina Braehmer—Planner, County of  
Sonoma  
Nina Bellucci—Planner, County of Sonoma

Scott Johnson— Napa Sonoma ADU  
Center & Pocket Housing, LLC  
Renee Schomp—Director, Napa Sonoma  
ADU Center

**Summary:** The nonprofit Napa Sonoma ADU Center works with 16 jurisdictions across Napa and Sonoma counties. They have a high-profile ADU website, a workbook, ADU cost calculator and offer free feasibility consults plus regular ADU office hours. The nonprofit is a fiscally- sponsored project of Napa Valley Community Foundation with support from Community Foundation Sonoma County. Some of their services and innovations include:

- Preapproved designs – Multi-jurisdiction preapproved/standard plan program connecting homeowners with a gallery of over 50 ADU plans from multiple designers and prefab companies, half of which are permit-ready
- Affordable ADU program – Offers tenant screening, help with leases, and security deposit guarantee for homeowners who rent to people at 65% of area median income or below
- Website and handouts – Clear, complete, easy to navigate website and handouts tailored to each of the jurisdictions; ADU Process Map, ADU Checklist
- More ADUs, Faster Decisions – Sonoma County also offers a Cottage Housing Development program that allows multiple detached units clustered around a common open space. These proposals can be approved by staff with no hearings if they meet the relevant standards
- ADU financing – The City of Napa has a Junior Unit Initiative Program that helps homeowners finance interior conversion ADUs and JADUs and provides project management support

# WEBINAR SUMMARIES, CONT'D

## City of San Jose

[watch webinar](#)

Keynote:

Mayor Sam Liccardo

Presenters & Panelists:

Martina Davis—Planner, City of San Jose

Andrew Wozencroft—Planner, City of San Jose

Fathia Macauley—Housing Trust Silicon Vly

Mackenzie Mossing—Deputy Chief of Staff,  
Sr. Policy Advisor, Ofc of Mayor Liccardo

Jared Basler—Adu Coalition, Maxable



**Summary:** San Jose was one of the first cities in the Bay Area to focus on promoting ADUs, started easing regulations even before state law changed. Their efforts touched on all three P's 1) Public outreach, 2) Policies and, 3) Process. Some of their key accomplishments include:

- More permissive standards - They allow two story ADUs and zero foot setbacks for the first floor. They also allow JADUs in garages and in new detached ADUs
- Interdepartmental meetings - City staff have regular meetings with planning, fire, public works and others
- Checklist and Ombudsman - They also developed a much-copied ADU checklist and designated an ADU ombudsman

## City of Los Angeles

[watch webinar](#)

Keynote: Assemblymember  
Richard Bloom

Presenters & Panelists:

Chris Hawthorne—Chief Design  
Officer, City of LA

Linda Wheaton—Senior Housing  
Policy Advisor, Southern CA Assn of  
Governments

Jared Basler—ADU Coalition, Maxable

**Summary:** The City of Los Angeles has over one million square feet of ADUs in the pipeline, with ADUs making up almost a quarter of new housing permits. With the pro-ADU public leadership of Mayor Eric Garcetti and engaged planning staff, LA's ADU production numbers continue to climb. Lower-cost garage conversions are the most common form for new ADUs. In 2020, LA launched a Standard Plan (or preapproved design) program.

Key details include:

- Standard plan offerings include 42 designs by 22 firms, highlighting a variety of different sizes and configurations. New designs added on a rolling basis
- Streamlined process and e-submissions
- Approvals are often ready in a day, as opposed to more than a month for the typical process
- ADU Accelerator program provides tenant screening and management to house 30% AMI tenants age 62+ for five years

# WEBINAR SUMMARIES, CONT'D

## City of Pasadena

[watch webinar](#)

Keynote: Assemblymember  
Laura Friedman

Presenters & Panelists:  
Bill Huang—Housing Director, City of  
Pasadena  
Andrew Slocum—Principal, Casitas

Jonathan Fearn—Managing Director,  
Greystar, Casita board  
Jared Basler—ADU Coalition, Maxable  
Allison Ruff Schuurman—Chief of Staff,  
Office of Laura Friedman



**Summary:** Pasadena ties their affordability program to housing choice vouchers. This solved several challenges including making it easier to verify renter income. They also chose to avoid deed restrictions and long term requirements. They offer two programs:

New ADUs:

- 3 year loan, up to \$150,000, 1% simple interest deferred
- Unit must be rented to Housing Choice Voucher recipient for seven years
- Priority for low income census tracts, homes below median value and long term occupant

Unpermitted ADUs:

- 20 year, \$75,000 loan, 1% simple interest, 5+ year deferral
- Homeowner income limited to 80% of area median income
- Homeowner chooses the tenant

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## City of Sacramento

[watch webinar](#)

Keynote: Steve Hansen  
(Former) City of Sacramento  
Councilmember

Presenters & Panelists:  
Garrett Norman—Associate Planner,  
City of Sacramento Community  
Development Dept

Matt Hertel—Long-range Planning  
Mgr, City of Sacramento  
Jared Basler—ADU Coalition, Maxable  
Development Dept



**Summary:** In 2020, Sacramento City Councilmembers adopted a Streamlining Menu with 50 action items to speed up housing approvals and increase the range of available housing. For ADUs, they have relaxed many of their standards, including:

- Allowing two ADUs, including two detached
- Tying the height limits to the main structure
- Requiring no side or rear setback

They are working on a website, brochure and three pre- inspected (permit ready) ADU plans. They have taken to the road, hosting tours, information sessions and even an ADU bootcamp.



# WEBINAR SUMMARIES, CONT'D

## City of East Palo Alto

[watch webinar](#)

Keynote:  
Senator Nancy Skinner

Presenters & Panelists:  
Rachel Horst—Housing & Economic  
Development Manager, City of EPA  
Derek Ouyang—Director, City Systems

Caleb Smith—Sustainability Coordinator,  
(former) County of San Mateo  
Sonya Singha—Housing Trust Silicon Vly  
Jared Basler—ADU Coalition, Maxable

Summary: Like many cities, East Palo Alto was struggling with unpermitted ADUs. They first tried an enforcement approach, but met significant pushback. They then readjusted and began a conversation with the community. With grant funding, they engaged the community in an extended conversation about what could be done. They focused on several aspects:

- Cooperation between nonprofits – Their plan allowed several different nonprofits to work together rather than competing
- Outreach – They conducted extensive outreach in churches, community centers and community events
- Assistance – EPA Cando has funding to meet with homeowners and walk them through the process

## City of San Francisco

[watch webinar](#)

Keynote:  
Senator Scott Weiner

Presenters & Panelists:  
Natalia Kwiatowska--Principal Planner,  
City of San Francisco  
Maia Small—Planner, City of San Francisco

Carly Grob--Staff, City of San Francisco  
Jared Basler—ADU Coalition, Maxable,  
Casita board

Summary: In August 2018 Mayor London Breed issued an executive directive to planning staff to “clear the ADU application backlog.” Six months later, planning staff achieved the goal. How did they manage it? City staff implemented a number of changes, including:

- Assistance for applicants --The Permit Center has a designated ADU team that will meet with homeowners during ADU-specific office hours. The also published a universal checklist and step by step guide
- Concurrent review and unified comments —After reviewing an application, city staff from all relevant departments meet to discuss their comments. They then provide one set of comments to the applicant
- They also created a bonus program to encourage multifamily ADU owners to build more ADUs in exchange for participating in rent stabilization. (They don't recommend a similar program for single family homeowners.) Multifamily ADUs are currently some of the only new rent-stabilized units being added to the SF housing stock

# WEBINAR SUMMARIES, CONT'D

## ADU Finance

[watch webinar](#)

Keynote: Assemblymember  
Tim Grayson

Presenters & Panelists:  
Sheryl Silva—CalHFA, Single Family  
Home Loan Production Manager  
Lindsay Moon—Searchlight Lending  
Meredith Stowers—Cross Country  
Mortgage

Lourdes Hernandez—Loan Depot  
Susan Brown—Core SGB  
Rafael Perez—The HomeMap, Casita  
board

**Summary:** Presenters from the lending industry shared the most common ways that homeowners finance new ADU construction, conversion of an existing structure or bringing an unpermitted unit up to code as a legal ADU. Careful planning and research are key to a successful outcome.

- As a homeowner, your ability to secure financing for an ADU may depend on your location, credit score, income, existing debts, existing home equity
- Common loan types used for ADU construction or conversion include: cash-out refinance, home equity line of credit (HELOC), second mortgage, construction loan, renovation loan, existing cash/assets, 401(k) loan
- Talk with a knowledgeable architect, designer, project manager or general contractor to confirm your ADU budget is realistic--and remember to include a contingency fund Confirm that you can build an ADU on your property before you borrow money
- Research local ADU programs that can assist lower-income, lower equity homeowners with financing, project management and finding a tenant
- Credit unions and other portfolio lenders who hold their loans rather than sell them may have more flexibility of terms--such as higher loan-to-value and debt-to-income ratios. They may also allow future rent income from the ADU to count as qualifying income
- Working with a lender experienced with ADU loans can be helpful as you explore options Read a detailed description of ADU financing options in the Casita Coalition's handbook

## County of San Mateo

[watch webinar](#)

Keynote: Assemblyman  
Marc Berman

Presenters & Panelists:  
Effie Verducci—Communications Ofcr,  
County of San Mateo  
Peggy Jensen—Deputy Manager, County  
of San Mateo

Caleb Smith—Sustainability Coordinator,  
(former) County of San Mateo  
Jennifer Duffy—President, Hello Housing

**Summary:** San Mateo County was one of the first places in the state to embrace ADUs. In 2018, they launched a number of tools for homeowners, including:

- ADU workbook - This comprehensive guide walks homeowners through each step in the ADU process from setting goals to design and to construction, to renting the unit
- Website - The San Mateo Second Unit Center website offers information such as jurisdiction standards, as well as spotlights on homeowners
- Events - In-person and online events include resource fairs, where ADU design, construction and lending professionals are available to talk to homeowners
- Fast processing - By contracting with a third party, the County responds to applications in ten days
- San Mateo's ADU Amnesty program offers homeowners a path to legalize units built without permits. A partnership with nonprofit Hello Housing offers 100 hours of one-on-one technical assistance to homeowners who agree to rent their units at or below 100% of the Area Median Income for three years

## City of Oakland

[watch webinar](#)

Keynote:  
Mayor Libby Schaaf

Presenters & Panelists:  
Darin Ranelletti—Policy Director for Housing Security, City of Oakland  
Meredith Rupp—Senior Planner, Urban Planning Partners

Lynette Dias—Principal, Urban Planning Partners  
Nikki Beasley—Executive Director, Richmond Neighborhood Housing Services  
Steve Edrington—ADAPT Dwellings  
Bobby Arte—The WellNest Company



**Summary:** The City of Oakland team highlighted the benefits of research and nonprofit partnerships to encourage ADU production. Looking at census data and original research, they sought to understand the unique challenges that lower resource, historically disinvested neighborhoods face to add ADUs to homes.

Challenges include:

- Limited access to capital
- Lack of awareness of the government rules
- Fears about tenant protection rules
- Unfamiliarity with the development process

The city addressed these by producing an ADU handbook and a guide for landlords. They are also partnering with the Keys to Equity program to provide assistance to homeowners building ADUs. The program targets Black homeowners and focuses on these areas

- Funding - Predevelopment costs average 10-12% of total cost and can be budget-busters--program helps with these costs
- Education - Homeowners take part in a six-part learning series
- Financing - Loans are available from a local credit union
- Preapproved designs - Homeowners can choose one of three designs to cut down on cost and speed up the process
- Construction management - The nonprofit provides a general contractor to oversee the work

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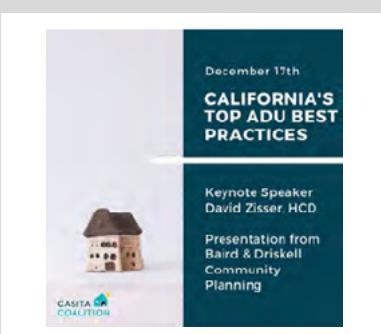
## Best Practices Year-End Review

[watch webinar](#)

Keynote: David Zisser, Assistant Deputy Director HCD, Local Government Relations & Accountability

Presenters & Panelists:  
Joshua Abrams—Baird & Driskell  
Jared Basler—Founder, Maxable Space, Casita board member  
Renee Schomp—Director, Napa Sonoma ADU Center  
Gary Geiler—Assistant Director of Community Development, City of San Diego

Anne Wyatt—Executive Director, Smart Share Housing Solutions  
Garrett Norman—Assistant Planner, City of Sacramento  
Jennifer Duffy—Executive Director, Hello Housing



With sincere thanks to all those who shared their best practices and lessons learned in 2021, and to those who came back to help us wrap up the series with this year-end summary webinar.

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- Gary Geiler—Assistant Director, Development Services, City of San Diego
- Colin Parent—La Mesa City Council, Executive Director Circulate SD
- Heather Peters—MTC, ABAG, Principal Regional Housing Planner
- Katrina Braehmer—Planner, County of Sonoma
- Nina Bellucci—Planner, County of Sonoma
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- Martina Davis—Planner, City of San Jose
- Andrew Wozencroft—Planner, City of San Jose
- Fathia Macauley—Housing Trust Silicon Valley
- Mackenzie Mossing—Deputy Chief of Staff, Senior Policy Advisor
- Chris Hawthorne—Chief Design Officer, City of LA
- Linda Wheaton—Senior Housing Policy Advisor, Southern CA Association of Governments
- Bill Huang—Housing Director, City of Pasadena
- Mackenzie Mossing—Deputy Chief of Staff, Senior Policy Advisor, San Jose Mayor's Office
- Garrett Norman—Associate Planner, City of Sacramento Community Development Dept
- Matt Hertel—Long-range Planning Manager, City of Sacramento
- Rachel Horst—Housing & Economic Development Manager, City of EPA
- Derek Ouyang—Director, City Systems
- Caleb Smith—Sustainability Coordinator (former) County of San Mateo
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- Lynette Dias—Principal, Urban Planning Partners
- Nikki Beasley—Executive Director, Richmond Neighborhood Housing Services
- Steve Edrington—ADapt Dwellings
- Bobby Arte—The WellNest Company
- Joshua Abrams—Baird & Driskell
- Anne Wyatt—Executive Director, Smart Share Housing Solutions

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## With many thanks to our Keynote Speakers

- Assemblymember Phil Ting
- Senator Mike McGuire
- Mayor Sam Liccardo, City of San Jose
- Assemblymember Richard Bloom
- Assemblymember Laura Friedman
- Assemblymember Phil Ting
- Steve Hansen (Former) City of Sacramento Councilmember
- Senator Nancy Skinner
- Senator Scott Weiner
- Assemblymember Tim Grayson
- Assemblymember Marc Berman
- Mayor Libby Schaaf, City of Oakland
- David Zisser, Assistant Deputy Director HCD, Local Government Relations & Accountability



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