



# DENSITY BONUS REPORT

## P-1(H)

This Density Bonus Report (formally known as the Supplemental Checklist) is required to be completed for all residential development applications being processed under Government Code [§65915](#) (state density bonus law) and must be submitted with the development permit application. Please attach additional pages and/or documents as necessary to help staff process your request.

Refer to Carlsbad Municipal Code [§21.86.040](#) for the city’s submittal requirements for density bonus applications and Information Bulletin [IB-112](#) and [IB-157](#) for additional information on density bonus and the city’s inclusionary housing requirements, respectively.

### A. PROJECT INFORMATION

Project Name: \_\_\_\_\_

Case Nos.: \_\_\_\_\_

Applicant: \_\_\_\_\_

Project Location:  
(Address & APN) \_\_\_\_\_

Property  
Description: \_\_\_\_\_

Project  
Description: \_\_\_\_\_

**B. DENSITY BONUS CALCULATIONS TABLE**

1. **General Plan Designation.** What is the underlying [General Plan Land Use Designation](#) of the site?
2. **Maximum Density.** What is the maximum allowed density under the General Plan designation?
3. **Site Size.** What is the total size of the site?
4. **Base Density.** What is the maximum number of units allowed at the site? (#B.2 X #B.3, rounded up)
5. **Affordable Housing.** What is the type & number of restricted affordable housing units proposed?
  - a. Extremely low:  b. Very low:  c. Low:  d. Moderate:  e. TOTAL:
6. **Percent Affordable.** What % of the units are affordable? (#B.5.e ÷ #B.4, rounded up)
7. **Density Bonus Units.**
  - a. What % increase in Base Density is allowed at the site (see Density Bonus Table)?
  - b. How many Density Bonus units are allowed at the site? (#B.4 X #B.7.a, rounded up)
8. **Total Housing Units.**
  - a. What is the total number of units at the site (#B.4 + #B.7.b)?
  - b. What is the total resulting density at the site (#B.8.a ÷ #B.3, rounded to nearest tenth)?

**C. INCLUSIONARY HOUSING CALCULATIONS TABLE**

1. **Total Housing Units.** What is the total number of units on site? (Insert figure from #B.8.a, or #D.8.a, whichever larger)
2. **Inclusionary Requirement.** How many required inclusionary units? (15% X #C.1, rounded per [\\$21.85.050](#))
3. **Inclusionary Housing.** What is the type & number of restricted inclusionary housing units proposed?
  - a. Extremely low:  b. Very low:  c. Low:  d. Moderate:  e. TOTAL:
4. **Affordable Housing.** What is the type & number of affordable housing units proposed? (figures in B.5)
  - a. Extremely low:  b. Very low:  c. Low:  d. Moderate:  e. TOTAL:
5. **Difference.** Positive numbers represent inclusionary units required above density bonus (#C.3 – #C.4)
  - a. Extremely low:  b. Very low:  c. Low:  d. Moderate:  e. TOTAL:

**D. SECONDARY DENSITY BONUS CALCULATIONS TABLE**

1. **Base Density.** What is the maximum number of units allowed at the site? (Figure from #B.4)
2. **Affordable Housing (#).** What is the type & number of affordable housing units proposed? (Figures from #B.5)
  - a. Extremely low:  b. Very low:  c. Low:  d. Moderate:  e. TOTAL:
3. **Affordable Housing (%).** What is % of affordable housing units proposed? (#D.2 ÷ #D.1, rounded up)
  - a. Extremely low:  b. Very low:  c. Low:  d. Moderate:  e. TOTAL:
4. **Eligibility.** What minimum housing income affordability criteria are you meeting? (select based on #D.3)
  - a. ≥15% extremely/very-low:  b. ≥24% low:  ≥44% moderate:
5. **Additional Affordable Housing (#).** What is the type & number of *additional* affordable units proposed? (only one category)
  - a. Very low:  b. Moderate:
6. **Additional Affordable Housing (%).** What is % of *additional* affordable units proposed? (#D.5 ÷ #D.1, rounded up)
  - a. Very low:  b. Moderate:

**7. Secondary Density Bonus Units.**

a. What % increase in Base Density is allowed at the site (see Density Bonus Table)?

b. How many Secondary Density Bonus units allowed at the site? (#D.1 X #D.7.a, rounded up)

**8. Total Housing Units.**

a. What is the total number of units at the site (#B.8.a + #D.7.b)?

b. What is the total resulting density at the site (#D.8.a ÷ #D.1, rounded to nearest tenth)?

**9. Total Affordability.**

a. What is the total percentage of affordable units at the site? (#B.6 + #D.6.a or #D.6.b – total cannot exceed 50%)

**E. CONCESSION(S), INCENTIVES(S) & WAIVERS<sup>1,2</sup>**

Using the fields below, provide the following information for each requested concession/incentive and/or waiver. Please attach additional documentation, if necessary, to help explain the request --- the use of exhibits, graphics, site plans, and/or charts to help explain the need for the deviation and the anticipated effects are strongly encouraged.

- Select whether the requested deviation is a concession/incentive or waiver
- Identify the specific city code/policy number of the development standard requiring deviation
- Specify the code/policy language of the development standard requiring deviation
- Describe how the development standard will be deviated
- Explain the reasons why the development project requires deviation from the standard<sup>3,4</sup>

**CONCESSION/INCENTIVE/WAIVER #1**

Select Type:     Concession/Incentive         Waiver

Code/Policy Number:

Required Standard:

  

Proposed Deviation:

  

Reason for Deviation:

  

**CONCESSION/INCENTIVE/WAIVER #2**

Select Type:     Concession/Incentive         Waiver

Code/Policy Number:

Required Standard:

  

Proposed Deviation:

  

Reason for Deviation:

**CONCESSION/INCENTIVE/WAIVER #3**

Select Type:     Concession/Incentive         Waiver

Code/Policy Number: \_\_\_\_\_

Required Standard: \_\_\_\_\_  
\_\_\_\_\_

Proposed Deviation: \_\_\_\_\_  
\_\_\_\_\_

Reason for Deviation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CONCESSION/INCENTIVE/WAIVER #4**

Select Type:     Concession/Incentive         Waiver

Code/Policy Number: \_\_\_\_\_

Required Standard: \_\_\_\_\_  
\_\_\_\_\_

Proposed Deviation: \_\_\_\_\_  
\_\_\_\_\_

Reason for Deviation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CONCESSION/INCENTIVE/WAIVER #5**

Select Type:     Concession/Incentive         Waiver

Code/Policy Number: \_\_\_\_\_

Required Standard: \_\_\_\_\_  
\_\_\_\_\_

Proposed Deviation: \_\_\_\_\_  
\_\_\_\_\_

Reason for Deviation: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

<sup>1</sup> Cities are required to grant concessions or incentives (referred to as concessions) to a developer that seeks and agrees to include affordable units in their development. One to four concessions are available for each development depending on the percentage of affordable housing that will be included within the development. A concession is one of three things (Gov. Code §65915, subd. (k)(1)-(3)):

- A reduction in site development standards or a modification of zoning code requirements or architectural design requirements that exceed minimum building standards that result in identifiable and actual costs reductions. Development Standard” includes a site or construction condition, including, but not limited to, a height limitation, a setback requirement, a floor area ratio, an onsite open-space requirement, a minimum lot area per unit requirement, or a parking ratio that applies to a residential development pursuant to any ordinance, general plan element, specific plan, charter, or other local condition, law, policy, resolution, or regulation. (Gov. Code §65915, subd. (o)(2)).
- Approval of mixed-use zoning in conjunction with the housing project if commercial, office, industrial, or other land uses will reduce the cost of the housing development and if such uses are compatible with the housing project and the existing or planned development in the area.
- Other regulatory concessions proposed by the developer or city that result in identifiable and actual cost reductions.

The City shall grant the concession unless one or more of the following written findings can be made, based upon substantial evidence (Gov. Code §65915, subd. (d)(1)(A)-(C)):

- The concession does not result in identifiable and actual cost reductions to provide for affordable housing costs, or for rents for the targeted units.
- The concession would have a “specific adverse impact [...] upon public health and safety or on any real property that is listed in the California Register of Historical Resources and for which there is no feasible method to satisfactorily mitigate or avoid the specific, adverse impact without rendering the development unaffordable to low-income and moderate-income households.”
- The concession would be contrary to state and federal law.

<sup>2</sup> In addition to concessions, an applicant may submit a proposal for a waiver or reduction (referred to as waiver) of development standards. (Gov. Code §65915, subd. (e)(1)). In no case may a city apply any development standard that will have the effect of physically precluding the construction of a development at the density or concessions permitted. The City shall grant the waiver unless one or more of the following written findings can be made (Gov. Code §65915, subd. (e)(1)):

- The waiver will have a specific adverse impact upon health, safety, or the physical environment and for which there is no feasible method to satisfactorily mitigate or avoid the specific adverse impact.
- The waiver will have a specific adverse impact on any real property listed in California Register of Historical Resources.
- The waiver would be contrary to state and federal law.

<sup>3</sup> Pursuant to the court case *Schreiber v. City of Los Angeles*, which was later codified as part of the passage of AB 1287, a developer is not required to provide financial evidence (i.e., pro forma) documenting that a requested incentive/concession will result in actual cost reductions. However, applicants still need to reasonably document “why” the requested incentive/concession will reduce affordable housing development costs. As such, the city requires applicants to provide reasonable documentation to show that a requested incentive/concession will result in identifiable cost reductions to provide for affordable housing costs or rents. Please attach additional documents, as appropriate.

<sup>4</sup> Sufficient documentation must be provided justifying why the city’s established development standard(s) or design regulation(s) physically preclude construction of the project and why the waiver(s) is necessary. Sufficient documentation may include a written explanation of the physical constraints accompanied with an exhibit showing the site and developable envelope.

# DENSITY BONUS TABLE



% of Base Units Reserved as Affordable	PRIMARY DENSITY BONUS					SECONDARY DENSITY BONUS <sup>(6)</sup>	
	Very Low-Income <sup>(1)</sup>	Low-Income Units <sup>(2)</sup>	Moderate-Income <sup>(3)</sup>	Land Donation <sup>(4)</sup>	Senior Housing <sup>(5)</sup>	Very-Low Income	Moderate-Income
5%	20%	-	-	-	20%	20%	20%
6%	22.5%	-	-	-	20%	23.75%	22.5%
7%	25%	-	-	-	20%	27.5%	25%
8%	27.5%	-	-	-	20%	31.25%	27.5%
9%	30%	-	-	-	20%	35%	30%
10%	32.5%	20%	5%	15%	20%	38.75%	32.5%
11%	35%	21.5%	6%	16%	20%	38.75%	35%
12%	38.75%	23%	7%	17%	20%	38.75%	38.75%
13%	42.5%	24.5%	8%	18%	20%	38.75%	42.5%
14%	46.25%	26%	9%	19%	20%	38.75%	46.25%
15%	50%	27.5%	10%	20%	20%	38.75%	50%
16%	50%	29%	11%	21%	20%	38.75%	50%
17%	50%	30.5%	12%	22%	20%	38.75%	50%
18%	50%	32%	13%	23%	20%	38.75%	50%
19%	50%	33.5%	14%	24%	20%	38.75%	50%
20%	50%	35%	15%	25%	20%	38.75%	50%
21%	50%	38.75%	16%	26%	20%	38.75%	50%
22%	50%	42.5%	17%	27%	20%	38.75%	50%
23%	50%	46.25%	18%	28%	20%	38.75%	50%
24%	50%	50%	19%	29%	20%	38.75%	50%
25%	50%	50%	20%	30%	20%	38.75%	50%
26%	50%	50%	21%	31%	20%	38.75%	50%
27%	50%	50%	22%	32%	20%	38.75%	50%
28%	50%	50%	23%	33%	20%	38.75%	50%
29%	50%	50%	24%	34%	20%	38.75%	50%
30%	50%	50%	25%	35%	20%	38.75%	50%
31%	50%	50%	26%	35%	20%	38.75%	50%
32%	50%	50%	27%	35%	20%	38.75%	50%
33%	50%	50%	28%	35%	20%	38.75%	50%
34%	50%	50%	29%	35%	20%	38.75%	50%
35%	50%	50%	30%	35%	20%	38.75%	50%
36%	50%	50%	31%	35%	20%	38.75%	50%
37%	50%	50%	32%	35%	20%	38.75%	50%
38%	50%	50%	33%	35%	20%	38.75%	50%
39%	50%	50%	34%	35%	20%	38.75%	50%
40%	50%	50%	35%	35%	20%	38.75%	50%
41%	50%	50%	38.75%	35%	20%	38.75%	50%
42%	50%	50%	42.5%	35%	20%	38.75%	50%
43%	50%	50%	46.25%	35%	20%	38.75%	50%
44%	50%	50%	50%	35%	20%	38.75%	50%

<sup>1</sup>Government Code §65915(f)(2); <sup>2</sup>Government Code §65915(f)(1); <sup>3</sup>Government Code §65915(f)(4); <sup>4</sup>Government Code §65915(g)(1); <sup>5</sup>Government Code §65915(f)(3) No minimum affordable units are required; <sup>6</sup>Government Code §65915(v)(1) & (2), as introduced under AB 1287, effective January 1, 2024.