



CITY COUNCIL
Staff Report

Meeting Date: March 24, 2020

To: Mayor and City Council

From: Scott Chadwick, City Manager

Staff Contact: Corey Funk, Associate Planner
corey.funk@carlsbadca.gov or 760-434-4645

Subject: 2019 Housing Element Annual Progress Report.

Recommended Action

Adopt a resolution accepting the 2019 Housing Element Annual Progress Report.

Executive Summary

The Housing Element Annual Progress Report is an information report prepared annually that details the status of the city's progress meeting its share of regional housing production goals and implementing the programs of its Housing Element. California Government Code Section 65400(a)(2) requires the City Council to consider this report at a public meeting.

Discussion

The attached 2019 Housing Element Annual Progress Report (Attachment A to Exhibit 1) has been prepared to fulfill the reporting requirements of the state (Government Code Section 65400(a)(2)) and the city's Housing Element Program 3.18. In addition, preparing and submitting the reports enables the city to apply for certain grants administered by the California Department of Housing and Community Development (HCD) and San Diego Association of Governments (SANDAG), including:

- SANDAG – Smart Growth Incentive Program
- SANDAG – Active Transportation Grant Program
- HCD – Infill Infrastructure Grant Program
- HCD – Housing-Related Parks Program
- HCD – SB2 Planning Grant

The 2019 Housing Element Annual Progress Report (Attachment A to Exhibit 1) includes:

- A list of housing development applications deemed complete in the reporting year, along with the number of units included, approved, and disapproved in each application (Table A of the report).

- A list of housing projects, and their respective number of units, that were issued a completed entitlement, a building permit, and/or an approved final inspection, in the reporting year (Table A2 of the report)
- The income category that each new housing unit satisfies in Tables A and A2 of the report, as defined by the federal Department of Housing and Urban Development and the state Department of Housing and Community Development (i.e., very low, low, moderate, and above-moderate income categories);
- Housing Production Status (Table B of the report) – Provides the status of housing production in the city and the city’s progress in meeting its share of regional housing needs during Calendar Year (CY) 2019.
- Program Implementation Status (Table D of the report) – Provides the status of and the city’s progress toward implementing the City of Carlsbad 2013-2021 Housing Element programs during CY 2019.
- Requirements that did not apply to Carlsbad and were left unreported (Tables C, E, F and G of the report)

Also included with this staff report is Exhibit 2 – Description of Terms and Methods, which provides additional information about the Regional Housing Needs Assessment and the housing income levels.

Fiscal Analysis

Accepting this informational report has no fiscal impact.

Next Steps

Staff will provide this report to the California Office of Planning and Research, HCD, SANDAG and the City of Carlsbad Planning Commission.

Environmental Evaluation (CEQA)

This report is categorically exempt from environmental review as per CEQA Guidelines Section 15306, which states that information collection activities are exempt from the provisions of CEQA.

Public Notification and Outreach

This item was noticed in accordance with the Ralph M. Brown Act and was available for public viewing and review at least 72 hours prior to scheduled meeting date.

Exhibits

1. City Council resolution
2. Description of Terms and Methods

RESOLUTION NO. 2020-050

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF CARLSBAD,
CALIFORNIA, ACCEPTING THE 2019 HOUSING ELEMENT ANNUAL PROGRESS
REPORT

WHEREAS, the Annual Housing Element Progress Report has been prepared to comply with Government Code Section 65400(a)(2), meet the grant funding requirements of certain San Diego Association of Governments, and California Department of Housing and Community Development programs, and implement Housing Element Program 3.18. The purpose of the report is to provide information to the City Council, the State Office of Planning and Research, the State Department of Housing and Community Development, San Diego Association of Governments and the public as to the status of the Housing Element programs, as well as mark the City’s progress in meeting its share of the region’s housing needs.

NOW, THEREFORE, BE IT RESOLVED by the City Council of the City of Carlsbad, California, as follows:

1. That the above recitations are true and correct.
2. That the report (Attachment A) is accepted, and the City Planner is directed to submit the report to the California Office of Planning and Research, the California Department of Housing and Community Development, and the San Diego Association of Governments.

PASSED, APPROVED AND ADOPTED at a Regular Meeting of the City Council of the City of Carlsbad on the 24th day of March 2020, by the following vote, to wit:

AYES: Hall, Blackburn, Bhat-Patel, Schumacher

NAYS: None

ABSENT: None



 MATT HALL, Mayor



 BARBARA ENGLERSON, City Clerk

(SEAL)



Jurisdiction	Carlsbad	
Reporting Year	2019	(Jan. 1 - Dec. 31)

ANNUAL ELEMENT PROGRESS REPORT
Housing Element Implementation

Note: "+" indicates an optional field

Cells in grey contain auto-calculation formulas

(CCR Title 25 §6202)

Table A

Housing Development Applications Submitted

Project Identifier					Unit Types		Date Application Submitted	Proposed Units - Affordability by Household Incomes							Total Approved Units by Project	Total Disapproved Units by Project	Streamlining	Notes	
1					2	3	4	5							6	7	8	9	10
Prior APN*	Current APN	Street Address	Project Name*	Local Jurisdiction Tracking ID*	Unit Category (SFA,SFD,2 to 4,5+,ADU,MH)	Tenure R=Renter O=Owner	Date Application Submitted	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Total PROPOSED Units by Project	Total APPROVED Units by project	Total DISAPPROVED Units by Project (Auto-calculated Can Be Overwritten)	Was APPLICATION SUBMITTED Pursuant to GC 65913.4(b)? (SB 35 Streamlining)	Notes*
Summary Row: Start Data Entry Below								0	0	86	1	0	31	318	436	30	0	0	
	2072304600	4816 Kelly Dr	HOOVER LEE	CDP 2019-0014	ADU	Renter	6/3/2019						1		1	1	0	No	
	2061601300	4269 Hillside Dr	MURRAY RESIDENCES	CDP 2019-0028	SFD	Owner	12/18/2019							3	3		0	No	Under review
	2155022000	1730 Cereus Ct	LEWISTON ADU	CDP 2019-0026	ADU	Renter	10/30/2019						1		1	1	0	No	
	2042320400	3677 Garfield ST	HERNANDEZ RESIDENCE	CDP 2019-0023	SFD	Owner	12/18/2019							1	1		0	No	Under review
	2041502600	3472 Garfield St	GARFIELD STREET ADU	CDP 2019-0022	ADU	Renter	8/28/2019						1		1	1	0	No	
	2061400800	1145 Harborview Ln	HALLBERG ADU	CDP 2019-0031	ADU	Renter	11/20/2019						1		1		0	No	Under review
	2033020400	786 Grand Ave	GRAND JEFFERSON	CT 2018-0008	5+	Owner	7/3/2019							6	6		0	No	Under review
	1552211200	570 Laguna Dr	LAGUNA DRIVE SUBDIVISION	CT 2018-0006	SFD	Owner	1/7/2019							13	13		0	No	Under review
	2120405600	1205 Aviara Pkwy	AVIARA APARTMENTS	EIR 2018-0001	5+	Renter	9/30/2019			82				247	329		0	No	Under review
	2042100300	3535 Harding St	HARDING & PALM TOWNHOUSE	CT 2017-0008	SFA	Owner	1/11/2019							6	6	6	0	No	
	2040310100	Madison St	MADISON FIVE	CT 2019-0002	5+	Owner	5/10/2019							5	5	5	0	No	
	2153702800	El Fuerte St	EL FUERTE VIEW	MS 2018-0010	SFD	Owner	11/4/2019							4	4		0	No	Under review
	2033031600	2975 JEFFERSON ST	2975 JEFFERSON STREET	RP 2018-0009	2/4/2020	Renter	2/14/2019							1	1	1	0	No	
	2040911300	540 Chestnut	540 CHESTNUT SFR + ADU	V 2018-0010	SFD	Owner	11/7/2019						1	1	2	2	0	No	
	2161701400	Viejo Castilla Wy	RESORT VIEW APARTMENTS	SDP 2018-0022	5+	Renter	11/21/2019			4				22	26		0	No	Under review
	1560511200	2297 HIGHLAND DR		CBR2019-0898	ADU	Renter	4/17/2019						1		1	1	0	No	
	2154202200	2719 OBELISCO CT		CBR2019-1032	ADU	Renter	4/30/2019				1				1	1	0	No	
	2073503300	4810 REFUGIO AVE 100		CBR2019-0633	ADU	Renter	3/20/2019						1		1	1	0	No	
	1671220600	3510 CHARTER OAK DR		CBR2019-0016	ADU	Renter	1/4/2019						1		1	1	0	No	
	2051203600	1389 BASSWOOD AVE		CBR2019-0046	ADU	Renter	1/8/2019						1		1	1	0	No	
	1675632400	4373 TUOLUMNE PL		CBR2019-2191	ADU	Renter	8/15/2019						1		1	1	0	No	
	1562313600	1330 KNOWLES AVE	FERRI RESIDENCE	CBR2019-0409	SFD	Owner	2/21/2019							1	1	1	0	No	
	1672803400	3744 LONGVIEW DR 150		CBR2019-2407	ADU	Renter	9/3/2019						1		1	1	0	No	
	2231405100	3213 LA COSTA AVE		CBR2019-0499	ADU	Renter	3/5/2019						1		1	1	0	No	
	2061924900	4575 PARK DR		CBR2019-1257	SFD	Owner	5/20/2019							1	1	1	0	No	
	2052204100	3516 HIGHLAND DR		CBR2019-2740	ADU	Renter	10/1/2019						1		1	1	0	No	
	2042702800	333 REDWOOD AVE		CBR2019-2950	ADU	Renter	10/18/2019						1		1	1	0	No	

Prior APN*	Current APN	Street Address	Project Name*	Local Jurisdiction Tracking ID*	Unit Category (SFA, SFD, 2 to 4, 5+, ADU, MH)	Tenure R=Renter O=Owner	Date Application Submitted	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Total PROPOSED Units by Project	Total APPROVED Units by project	Total DISAPPROVED Units by Project (Auto-calculated Can Be Overwritten)	Was APPLICATION SUBMITTED Pursuant to GC 65913.4(b)? (SB 35 Streamlining)	Notes*
	2162403300	2405 TORREJON PL		CBR2019-3028	ADU	Renter	10/25/2019						1		1	1	0	No	
	2232500100	7553 ESFERA ST		CBR2019-1049	ADU	Renter	5/1/2019						1		1		0	No	Under review
	2081603200	5067 ASHBERRY RD		CBR2019-2622	ADU	Renter	9/19/2019						1		1		0	No	Under review
	2071202600	3872 VALLEY ST		CBRA2019-0038	ADU	Renter	1/30/2019						1		1		0	No	Under review
	2156102900	7129 AVIARA DR	SEHGAL RESIDENCE	CBR2019-0014	SFD	Owner	1/3/2019							1	1		0	No	Under review
	2054303200	3832 MARGARET WAY		CBR2019-3427	ADU	Renter	12/4/2019						1		1		0	No	Under review
	2644812100	3561 CORTE ESPERANZA		CBR2019-1352	ADU	Renter	5/30/2019						1		1		0	No	Under review
	2154600500	2700 ARGONAUTA ST	2700 ARGONAUTA RESIDENCE	CBR2019-0988	SFD	Owner	4/25/2019							1	1		0	No	Under review
	2050201800	1389 OAK AVE	OAK AVENUE PARCEL MAP	CBR2019-2901	SFD	Owner	10/15/2019							1	1		0	No	Under review
	1562317400	1463 BUENA VISTA WAY		CBRA2019-0332	SFD	Owner	11/15/2019							1	1		0	No	Under review
	2050511100	3293 HIGHLAND DR		CBRA2019-0275	ADU	Renter	9/18/2019						1		1		0	No	Under review
	2050809700	3217 MAEZEL LN		CBR2019-3686	ADU	Renter	12/30/2019						1		1		0	No	Under review
	2225923900	2813 VIA CONQUISTADOR		CBR2019-2012	ADU	Renter	7/31/2019						1		1		0	No	Under review
	2053303500	2073 LEE CT		CBR2019-1436	ADU	Renter	6/6/2019						1		1		0	No	Under review
	2050805400	1892 BASSWOOD AVE		CBRA2019-0343	ADU	Renter	12/2/2019						1		1		0	No	Under review
	1562317400	1465 BUENA VISTA WAY		CBRA2019-0333	ADU	Renter	11/15/2019						1		1		0	No	Under review
	2050522500	1310 BASSWOOD AVE		CBR2019-2961	ADU	Renter	10/21/2019						1		1		0	No	Under review
	2156901500	1305 CASSINS ST		CBR2019-0577	ADU	Renter	3/14/2019						1		1		0	No	Under review
	2050205700	1286 PINE AVE	1284 PINE AV LOT SPLIT	CBRA2019-0141	ADU	Renter	5/7/2019						1		1		0	No	Under review
	2152311200	7287 ALMADEN LN		CBR2019-3120	SFD	Owner	11/4/2019							1	1		0	No	Under review
	2154600600	2670 ARGONAUTA ST	ABEDI MOGHADDAM FAMILY RESIDENCE	CBR2019-1401	SFD	Owner	6/4/2019							1	1		0	No	Under review
	1551603700	1112 BUENA VISTA WAY		CBR2019-3369	ADU	Renter	11/26/2019						1		1		0	No	Under review
	2050205700	1284 PINE AVE	1284 PINE AV LOT SPLIT	CBRA2019-0140	SFD	Owner	5/7/2019							1	1		0	No	Under review
	2051900900	1082 PALM AVE	THIRKELL ADU	CBR2019-1940	ADU	Renter	7/23/2019						1		1		0	No	Under review

Jurisdiction	Carlsbad	
Reporting Year	2019	(Jan. 1 - Dec. 31)

ANNUAL ELEMENT PROGRESS REPORT
Housing Element Implementation
 (CCR Title 25 §6202)

Note: "+" indicates an optional field
 Cells in grey contain auto-calculation formulas

Table A2

Annual Building Activity Report Summary - New Construction, Entitled, Permits and Completed Units

Project Identifier				Unit Types		Affordability by Household Incomes - Completed Entitlement								Streamlining	Infill	Housing with Financial Assistance and/or Deed Restrictions		Housing without Financial Assistance or Deed Restrictions	Term of Affordability or Deed Restriction	Demolished/Destroyed Units			Notes			
1				2	3	4								5	6	13	14	15	16	17	18	19	20			21
Prior APN*	Current APN	Street Address	Project Name*	Local Jurisdiction Tracking ID*	Unit Category (SFA, SFD 2 to 4.5+, ADU, MH)	Tenure R=Renter O=Owner	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Entitlement Date Approved	# of Units issued Entitlements	How many of the units were Extremely Low Income?*	Was Project APPROVED using GC 65913.4(b)? (SB 35 Streamlining) Y/N	Infill Units? Y/N*	Assistance Programs for Each Development (see instructions)	Deed Restriction Type (see instructions)	For units affordable without financial assistance or deed restrictions, explain how the locality determined the units were affordable (see instructions)	Term of Affordability or Deed Restriction (years) (if affordable in perpetuity enter 1000)*	Number of Demolished/Destroyed Units*	Demolished or Destroyed Units*	Demolished/Destroyed Units Owner or Renter*	Notes*
Summary Row: Start Data Entry Below							0	0	0	0	0	5	41		46	0	0						5	0	0	
2033031600	2975 JEFFERSON ST	2975 JEFFERSON ST	RP2018-0009	2/4/2020	Renter							1	4/5/2019	1		N										
2033510300	3050 MADISON ST	4 PLUS 1 LUXURY LIVING	RP150016	2/4/2020	Renter							2	1/10/2019	2		N						2	Demolished			
2040911300	540 CHESTNUT ST	540 CHESTNUT SFR + ADU	V2018-0010	SFD	Owner						1	1	12/23/2019	2		N					Developer survey					
2041502600	3472 GARFIELD ST	GARFIELD ST ADU	CDP2019-0022	ADU	Renter						1		9/12/2019	1		N					Developer survey					
2042100300	3535 HARDING ST	HARDING AND PALM TOWNHOUSE PROJECT	CT2017-0008	SFA	Owner							5	9/4/2019	5		N						1	Demolished			
2070221100	4246 HILLSIDE DR	HILLSIDE DRIVE RESIDENTIAL	CDP2019-0002	SFD	Owner						1	1	12/23/2019	2		N					Developer survey					
2155022000	1730 CEREUS CT	LEWISTON ADU	CDP2019-0026	ADU	Renter						1		11/13/2019	1		N					Developer survey					
2040310100	MADISON ST	MADISON FIVE	CT2019-0002	5+	Owner							5	7/18/2019	5		N										
2052102200	1196 MAGNOLIA AV	NAYLOR JORDAN TPM	MS150001	SFD	Owner							1	7/25/2019	1		N										
2050201800	1391 OAK AVE	OAK AVENUE PARCEL MAP	MS2018-0002	SFD	Owner							1	8/5/2019	1		N										
2122720100	Twain Ave.	OCEAN VIEW POINT	GPA15002	SFD	Owner							13	8/20/2019	13		N										
2031013500	2569 ROOSEVELT ST	ROOSEVELT TOWNHOMES	CT2017-0006	SFA	Owner							4	4/3/2019	4		N						1	Demolished			
2070640200	3960 SUNNYHILL DR	SLOWIK ADU	CDP2017-0064	ADU	Renter						1		2/6/2019	1		N					Developer survey					
2031012000	2646 STATE ST	THE SEAGLASS	CT2018-0004	SFA	Owner							7	4/17/2019	7		N						1	Demolished			

ANNUAL ELEMENT PROGRESS REPORT
Housing Element Implementation
 (CCR Title 25 §6202)
 Table A2

Note: "+" indicates an optional field
 Cells in grey contain auto-calculation formulas

Project Identifier				Unit Types		Affordability by Household Incomes - Building Permits							Streamlining	Infill	Housing with Financial Assistance and/or Deed Restrictions		Housing without Financial Assistance or Deed Restrictions	Term of Affordability or Deed Restriction	Demolished/Destroyed Units			Notes				
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22					
Prior APN*	Current APN	Street Address	Project Name*	Local Jurisdiction Tracking ID*	Unit Category (SFA, SFD, 2 to 4, 5+, ADU, MH)	Tenure R=Renter O=Owner	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Building Permits Date Issued	# of Units Issued Building Permits	How many of the units were Extremely Low Income?*	Was Project APPROVED using GC 65913.4(b)? (SB 35 Streamlining) Y/N	Infill Units? Y/N*	Assistance Programs for Each Development (see instructions)	Deed Restriction Type (see instructions)	For units affordable without financial assistance or deed restrictions, explain how the locality determined the units were affordable. (see instructions)	Term of Affordability or Deed Restriction (years) (if affordable in perpetuity enter 1000)*	Number of Demolished/Destroyed Units*	Demolished or Destroyed Units*	Demolished/Destroyed Units Owner or Renter*	Notes*
Summary Row: Start Data Entry Below							0	2	47	2	0	59	212		322	0	0						13	0	0	
1562111800	1662 JAMES DR			CBR2018-2084	ADU	Renter							9/6/2019	1		N					Developer survey					
2154202200	2719 OBELISCO CT			CBR2019-1032	ADU	Renter			1				7/18/2019	1		N					Developer survey					
1561302000	2699 WILSON ST			CBRA2018-0205	ADU	Renter	1						5/13/2019	1		N					Developer survey					
2053300800	3572 DONNA DR			CBR2018-3057	ADU	Renter							10/22/2019	1		N					Developer survey					
2231405100	3213 LA COSTA AVE			CBR2019-0499	ADU	Renter							11/21/2019	1		N					Developer survey					
2073503300	4810 REFUGIO AVE 100			CBR2019-0633	ADU	Renter							6/4/2019	1		N					Developer survey					
2232840500	7437 TRIGO LN			CBRA2018-0209	ADU	Renter							10/22/2019	1		N					Developer survey					
1560511200	2297 HIGHLAND DR			CBR2019-0898	ADU	Renter							7/3/2019	1		N					Developer survey					
2060202400	392 CHINQUAPIN AVE			CBRA2018-0245	ADU	Renter							9/4/2019	1		N					Developer survey					
2072301200	4816 KELLY DR			CBRA2018-0193	ADU	Renter							9/17/2019	1		N					Developer survey					
2041502600	3474 GARFIELD ST			CBR2019-2647	ADU	Renter							11/20/2019	1		N					Developer survey					
2052204100	3516 HIGHLAND DR			CBR2019-2740	ADU	Renter							10/1/2019	1		N					Developer survey					
1672803400	3744 LONGVIEW DR 150			CBR2019-2407	ADU	Renter							11/22/2019	1		N					Developer survey					
2061924900	4575 PARK DR			CBR2019-1257	SFD	Owner						1	10/31/2019	1		N										
1675632400	4373 TUOLUMNE PL			CBR2019-2191	ADU	Renter							12/6/2019	1		N					Developer survey					
1671220600	3510 CHARTER OAK DR			CBR2019-0016	ADU	Renter							4/22/2019	1		N					Developer survey					
1670412100	3222 CANDELAS ST			CBRA2019-0337	SFD	Owner						4	12/19/2019	4		N										
2232831500	7458 TRIGO LN			CBR2019-1853	ADU	Renter							11/12/2019	1		N					Developer survey					
2033031600	2975 JEFFERSON ST D	2975 JEFFERSON ST		CBR2018-0292	2/4/2020	Renter							9/3/2019	1		N										
2031013816	2711 ROOSEVELT ST	BEACHWALK AT ROOSEVELT		CBRA2018-0238	SFA	Owner			2				1/11/2019	9		N			INC			4	Demolished			
1683601600	2615 CANNON RD	CASA ALDEA RR PA 22		CBR2017-2218	5+	Renter			20			35	2/14/2019	98		N			INC	Developer survey						
2052109600	1161 CHESTNUT AVE	CHESTNUT AVENUE RESIDENCE		CBR2018-2283	SFD	Owner							10/4/2019	1		N										
1562313600	1330 KNOWLES AVE	FERRI RESIDENCE		CBR2019-0409	SFD	Owner							12/18/2019	1		N										
1675113500	4373 YOSEMITE ST	GLAVANIC ADU		CBR2018-3415	ADU	Renter	1						3/29/2019	1		N					Developer survey					
2051203600	1389 BASSWOOD AVE	GROSSMAN ADU		CBR2019-0046	ADU	Renter							4/16/2019	1		N					Developer survey					
2032020301	859 HOME AVE	HOME AVENUE		CBRA2018-0027	SFD	Owner							1/24/2019	3		N										
2032020305	851 HOME AVE	HOME AVENUE		CBRA2018-0031	SFA	Owner							1/24/2019	2		N										
2101151000	5466 CARLSBAD BLVD	JAN RESIDENCE REMODEL ADU		CBRA2018-0211	ADU	Renter							1/31/2019	1		N					Developer survey					
2152205600	2155 ALGA RD	KAUFMAN ADU		CBR2018-3106	ADU	Renter							3/12/2019	1		N					Developer survey					
2162506300	2630 VISTOSA PL	KENNY RESIDENCE		CBRA2018-0206	SFD	Owner							5/9/2019	1		N										
2232113100	3260 PIRAGUA ST	LAS BRISIAS MS		CBR2018-1908	SFD	Owner							3/15/2019	1		N										
2040310400	3130 MADISON ST	MADISON ST APARTMENTS		CBR2018-2135	2/4/2020	Renter							10/31/2019	3		N						1	Demolished			
2052210300	1649 BRADY CIR	MAGNOLIA-BRADY		CBRA2019-0312	ADU	Renter			1				11/4/2019	1		N				INC						
2052210300	1647 BRADY CIR	MAGNOLIA-BRADY		CBRA2019-0176	SFD	Owner							11/4/2019	6		N						1	Demolished			
2062000300	4469 ADAMS ST	MARTIN RESIDENCE		CB142333	SFD	Owner							1/7/2019	1		N										
1551702500	2637 JEFFERSON ST	MFD-01		CBR2018-3291	2/4/2020	Renter							3/6/2019	3		N					Developer survey		1	Demolished		
1562200200	1841 BUENA VISTA WAY	MILES BUENA VISTA		CBRA2018-0039	SFD	Owner							1/10/2019	3		N										
2071306000	3928 HIGHLAND DR	MINICILLI ADDITION ADU		CBR2018-3523	ADU	Renter							4/8/2019	1		N					Developer survey					
2070640300	4012 SUNNYHILL DR	NAUGLER ADU		CBR2018-1869	ADU	Renter							3/26/2019	1		N					Developer survey					
2150530262	6640 ENCELIA PL	POINSETTIA 61		CBRA2019-0324	SFD	Owner							11/27/2019	42		N										
2150530215	6661 ENCELIA PL	POINSETTIA 61		CBRA2019-0295	ADU	Renter			5				11/27/2019	5		N				INC						
2061804000	4392 ADAMS ST	POLZIN RESIDENCE ADU		CBRA2018-0239	ADU	Renter							4/15/2019	1		N					Developer survey					
2150705200	1587 TRITON ST	RAUM HOUSE		CBR2019-0773	SFD	Owner							10/17/2019	1		N										
2060424700	3915 SHERIDAN PL	SHERIDAN PLACE SINGLE FAMILY RESIDENCE		CBRA2017-0153	ADU	Renter							3/22/2019	1		N					Developer survey					

Prior APN*	Current APN	Street Address	Project Name*	Local Jurisdiction Tracking ID*	Unit Category (SFA, SFD, 2 to 4.5+, ADU, MFI)	Tenure R=Renter O=Owner	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Building Permits Date Issued	# of Units Issued Building Permits	How many of the units were Extremely Low Income?*	Was Project APPROVED using GC 65913.4(b)? (SB 35 Streamlining) Y/N	Infill Units? Y/N*	Assistance Programs for Each Development (see instructions)	Deed Restriction Type (see instructions)	For units affordable without financial assistance or deed restrictions, explain how the locality determined the units were affordable (see instructions)	Term of Affordability or Deed Restriction (years) (if affordable in perpetuity enter 1000)*	Number of Demolished/Destroyed Units*	Demolished or Destroyed Units*	Demolished/Destroyed Units Owner or Renter*	Notes*
	2060424700	3913 SHERIDAN PL	SHERIDAN PLACE SINGLE FAMILY RESIDENCE	CBRA2017-0152	SFD	Owner							1	3/22/2019	1		N									
	2042804505	430 TAMARACK AVE	TAMARACK BEACH HOMES	CBRA2018-0244	SFD	Owner							3	4/15/2019	3		N					2	Demolished			
	2070731000	4054 SKYLINE RD	THOMPSON GEESBREGHT ADU	CBR2018-3474	ADU	Renter					1		8/28/2019	1		N			Developer survey							
	2040701100	3355 TYLER ST	TYLER STREET RESIDENCES	CBRA2019-0053	SFA	Owner							6	9/12/2019	6		N					2	Demolished			
	2132621858	6066 COLT PL 105	UPTOWN BRESSI RANCH	CBRA2019-0120	SFA	Owner			17				62	4/23/2019	79		N		INC							
	2041321709	350 WALNUT AVE	WALNUT BEACH HOMES	CBRA2018-0220	SFA	Owner							8	9/18/2019	8		N					2	Demolished			
	1562205900	1760 YADA PL	YADA FARM	CBRA2018-0055	SFD	Owner							11	6/27/2019	11		N									
	1562200100	1732 YADA PL	YADA FARM	CBRA2018-0077	ADU	Renter			2					4/17/2019	2		N		INC							

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Note: "*" indicates an optional field
 Cells in grey contain auto-calculation formulas

Annual Building Activity Report Summary - New Construction, Entitled, Permits and Completed Units																												
Project Identifier				Unit Types		Affordability by Household Incomes - Certificates of Occupancy										Streamlining	Infill	Housing with Financial Assistance and/or Deed Restrictions		Housing without Financial Assistance or Deed Restrictions	Term of Affordability or Deed Restriction	Demolished/Destroyed Units			Notes			
1				2	3	10										11	12	13	14	15	16	17	18	19	20			21
Prior APN*	Current APN	Street Address	Project Name*	Local Jurisdiction Tracking ID*	Unit Category (SFA,SFD,2 to 4,5+,ADU,MH)	Tenure R=Renter O=Owner	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Certificates of Occupancy or other forms of readiness (see instructions) Date Issued	# of Units issued Certificates of Occupancy or other forms of readiness	How many of the units were Extremely Low Income?*	Was Project APPROVED using GC 65913.4(b)? (SB 35 Streamlining) Y/N	Infill Units? Y/N*	Assistance Programs for Each Development (see instructions)	Deed Restriction Type (see instructions)	For units affordable without financial assistance or deed restrictions, explain how the locality determined the units were affordable (see instructions)	Term of Affordability or Deed Restriction (years) (if affordable in perpetuity enter 1000)*	Number of Demolished/Destroyed Units*	Demolished or Destroyed Units*	Demolished/Destroyed Units Owner or Renter*	Notes*		
Summary Row: Start Data Entry Below							0	0	111	0	56	22	359		548	0	0							6	0	0		
	1562310100	1289 BUENA VISTA WAY		CBR2017-1350	ADU	Renter								1	4/23/2019	1	N				Developer survey							
	1561522900	2605 CREST DR		CBRA2017-0123	SFD	Owner							1	3/6/2019	1	N												
	1561522900	2607 CREST DR		CBRA2017-0124	ADU	Renter							1	3/6/2019	1	N					Developer survey							
	2050804700	3237 MAEZEL LN		CBR2018-2110	ADU	Renter							1	2/14/2019	1	N					Developer survey							
	2146312500	6760 STRAWBERRY PL		CB163973	SFD	Owner							1	1/30/2019	1	N												
	2042703200	392 TAMARACK AVE		CBR2018-2113	ADU	Renter							1	4/1/2019	1	N					Developer survey							
	2231700700	7722 FAROL PL 102		CBR2018-0407	ADU	Renter							1	1/31/2019	1	N					Developer survey							
	1670531600	3357 RIDGECREST DR		CBRA2018-0145	ADU	Renter							1	10/22/2019	1	N					Developer survey							
	1562314500	2552 GREGORY DR		CBR2018-0526	ADU	Renter							1	7/30/2019	1	N					Developer survey							
	1673920300	2726 NAPLES CT 102		CBR2018-0785	ADU	Renter							1	4/23/2019	1	N					Developer survey							
	2052209700	3687 VALLEY ST		CBRA2018-0023	SFD	Owner							1	2/1/2019	1	N												
	2073503300	4810 REFUGIO AVE 100		CBR2019-0633	ADU	Renter							1	8/9/2019	1	N					Developer survey							
	2152205600	2155 ALGA RD		CBR2018-3106	ADU	Renter							1	10/17/2019	1	N					Developer survey							
	2232840500	7437 TRIGO LN		CBRA2018-0209	ADU	Renter							1	10/29/2019	1	N					Developer survey							
	1560511200	2297 HIGHLAND DR		CBR2019-0898	ADU	Renter							1	11/18/2019	1	N					Developer survey							
	1560320800	2362 CIPRIANO LN		CBR2018-2692	ADU	Renter							1	11/18/2019	1	N					Developer survey							
	2054401900	1642 BRADY CIR		CBR2018-2044	ADU	Renter							1	8/12/2019	1	N					Developer survey							
	1671220600	3510 CHARTER OAK DR		CBR2019-0016	ADU	Renter							1	10/17/2019	1	N					Developer survey							
	2070532400	3910 MONROE ST		CBR2018-1656	ADU	Renter							1	3/19/2019	1	N					Developer survey							
	2152205900	2139 ALGA RD	2139 ALGA ROAD	CBR2017-1415	SFD	Owner							1	3/11/2019	1	N												
	2041111100	906 PINE AVE	906 PINE AVENUE	CBR2016-0348	2/4/2020	Renter							2	12/30/2019	2	N						2	Demolished					
	1670406134	3125 SALINA RD	ACACIA AT THE PRESERVES	CBRA2017-0337	SFA	Owner							12	11/20/2019	12	N												
	2042310600	163 ACACIA AV	ACACIA ESTATES	CB161771	2/4/2020	Owner							1	8/16/2019	1	N						2	Demolished					
	1675314500	3108 AFTON WAY	AFTON WAY	CBRA2017-0070	SFD	Owner							7	4/22/2019	7	N						1	Demolished					
	1675315200	3110 AFTON WAY	AFTON WAY	CBRA2017-0249	ADU	Renter							1	4/23/2019	1	N			INC									
	1670404524	3394 CAMPO AZUL CT	AGAVE AT THE PRESERVE	CBRA2017-0231	SFA	Owner							22	4/8/2019	22	N												
	1670406221	3281 VESTRA WAY	BLUE SAGE CONDOS	CBRA2017-0343	SFA	Owner							19	11/7/2019	19	N												
	1670404600	3066 VILLETA AVE	CYPRESS AT THE PRESERVE	CBRA2017-0139	SFD	Owner							17	8/7/2019	17	N												
	2033032101	741 GRAND AVE	GRAND MADISON THE	CBRA2017-0322	5+	Owner							11	6/3/2019	11	N												
	2042341500	157 CHESTNUT AVE	KIM RESIDENCE REMODEL	CBRA2018-0042	ADU	Renter							1	4/4/2019	1	N					Developer survey							
	1561426000	1610 BUENA VISTA WAY	KING PROPERTY	CBR2017-2481	SFD	Owner							1	9/19/2019	1	N												
	2061804100	4422 ADAMS ST	KLOVANISH RESIDENCE	CBR2017-1231	SFD	Owner							1	12/17/2019	1	N												
	2071206600	3987 PARK	KOBAYASHI SDU	CBR2017-0589	ADU	Renter							1	3/5/2019	1	N					Developer survey							
	2232500700	3325 VENADO ST	LO RESIDENCE	CB161829	SFD	Owner							1	7/16/2019	1	N												
	2060423500	3998 LONG PL	LONG PLACE ACCESSORY DWELLING UNIT	CBR2018-1561	ADU	Renter							1	5/28/2019	1	N					Developer survey							
	2231305000	3111 CADENCIA ST	LOT 213 LA COSTA AVE	CBR2018-0464	SFD	Owner							1	7/19/2019	1	N												
	2042804401	707 MAGNOLIA AVE	MAGNOLIA TOWNHOMES	CB162031	SFA	Owner							7	12/9/2019	7	N						1	Demolished					
	1563512500	1228 LANAI CT	MILES PACIFIC SUBDIVISION	CB152653	SFD	Owner							1	3/7/2019	1	N												
	1563512500	1230 LANAI CT	MILES PACIFIC SUBDIVISION	CB160932	ADU	Renter							1	3/7/2019	1	N			INC									
	2070640300	4012 SUNNYHILL DR	NAUGLER ADU	CBR2018-1869	ADU	Renter							1	8/29/2019	1	N					Developer survey							
	2052208600	1655 CHESTNUT AVE	OZAKI PARCEL 2	CB163118	SFD	Owner							1	8/12/2019	1	N												
	2030230400	250 NORMANDY LN	RANCHO PARADISO	CBRA2017-0018	ADU	Renter							1	10/23/2019	1	N					Developer survey							
	2030230400	252 NORMANDY LN	RANCHO PARADISO	CBRA2017-0016	SFD	Owner							1	10/23/2019	1	N												
	2081951100	2600 GAGE DR	ROBERTSON RANCH WEST VILLAGE	CB153566	5+	Renter							101	3/25/2019	101	N			INC									
	2081951000	2514 WEST RANCH ST	ROBERTSON RANCH WEST VILLAGE	CB160131	5+	Renter							207	1/2/2019	207	N			INC									
	2150431600	6659 PEREGRINE PL	SEASCAPE	CB160500	SFD	Owner							5	3/18/2019	5	N												

Prior APN*	Current APN	Street Address	Project Name*	Local Jurisdiction Tracking ID*	Unit Category (SFA,SFD,2 to 4.5+,ADU,MH)	Tenure R=Renter O=Owner	Very Low-Income Deed Restricted	Very Low-Income Non Deed Restricted	Low-Income Deed Restricted	Low-Income Non Deed Restricted	Moderate-Income Deed Restricted	Moderate-Income Non Deed Restricted	Above Moderate-Income	Certificates of Occupancy or other forms of readiness (see instructions) Date Issued	# of Units issued Certificates of Occupancy or other forms of readiness	How many of the units were Extremely Low Income?*	Was Project APPROVED using GC 65913.4(b)? (SB 35 Streamlining) Y/N	Infill Units? Y/N*	Assistance Programs for Each Development (see instructions)	Deed Restriction Type (see instructions)	For units affordable without financial assistance or deed restrictions, explain how the locality determined the units were affordable (see instructions)	Term of Affordability or Deed Restriction (years) (if affordable in perpetuity enter 1000)*	Number of Demolished/Destroyed Units*	Demolished or Destroyed Units*	Demolished/Destroyed Units Owner or Renter*	Notes*
	2150432200	6684 PEREGRINE PL	SEASCAPE	CB160515	ADU	Renter			1					3/5/2019	1	N			INC							
	2081910100	2558 GLASGOW DR	THE BLUFFS	CBRA2016-0036	SFD	Owner							1	6/24/2019	1	N										
	2081922100	4844 NELSON CT	THE RIDGE	CBRA2017-0252	SFD	Owner							7	4/25/2019	7	N										
	2081934300	4734 CHASE CT	THE TERRACES	CBRA2018-0062	SFD	Owner							7	1/30/2019	7	N										
	2081915100	2519 WELLSRING ST	THE VISTAS	CBRA2017-0272	SFD	Owner							1	9/17/2019	1	N										
	2132622215	6082 COLT PL 104	UPTOWN BRESSI RANCH	CBRA2019-0113	SFA	Owner			5				17	12/16/2019	22	N			INC							
	2072301900	4812 KELLY DR	WHITE ADU	CBR2018-0119	ADU	Renter						1		3/26/2019	1	N				Developer survey						
	1562206100	1710 YADA PL	YADA FARM	CBRA2018-0057	SFD	Owner							5	11/6/2019	5	N										
	1562200100	1732 YADA PL	YADA FARM	CBRA2018-0077	ADU	Renter			2					11/5/2019	2	N			INC							

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This table is auto-populated once you enter your jurisdiction name and current year data. Past year information comes from previous APRs.
 Please contact HCD if your data is different than the material supplied here

Table B
Regional Housing Needs Allocation Progress
Permitted Units Issued by Affordability

		1	2									3	4
Income Level		RHNA Allocation by Income Level	2013	2014	2015	2016	2017	2018	2019	2020	2021	Total Units to Date (all years)	Total Remaining RHNA by Income Level
Very Low	Deed Restricted	912	35			7						44	868
	Non-Deed Restricted							2					
Low	Deed Restricted	693	27	6	9	163	8	4	47			272	421
	Non-Deed Restricted		2	1			2	1	2				
Moderate	Deed Restricted	1062				56						316	746
	Non-Deed Restricted		104	13	20	18	18	28	59				
Above Moderate		2332	1136	235	200	439	624	210	212			3056	0
Total RHNA		4999											
Total Units			1304	255	229	683	652	243	322			3688	2035

Note: units serving extremely low-income households are included in the very low-income permitted units totals
 Cells in grey contain auto-calculation formulas

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Table D

Program Implementation Status pursuant to GC Section 65583

Housing Programs Progress Report

Describe progress of all programs including local efforts to remove governmental constraints to the maintenance, improvement, and development of housing as identified in the housing element.

1	2	3	4
Name of Program	Objective	Timeframe in H.E	Status of Program Implementation
1.1 - Condominium Conversion	<p>The city will continue to discourage and/or restrict condominium conversions when such conversions would reduce the number of low or moderate income housing units available throughout the city. All condominium conversions are subject to the city's Inclusionary Housing Ordinance; the in-lieu fees or actual affordable units required by the ordinance would be used to mitigate the loss of affordable rental units from the city's housing stock.</p>	○	<p>The city considers condominium conversions on a case by case basis. In 2019, there were no condominium conversions approved.</p>
1.2 - Mobile Home Park Preservation	<p>The city will continue to implement the city's Residential Mobile Home Park zoning ordinance (Municipal Code Chapter 21.37) that sets conditions on changes of use or conversions of mobile home parks, consistent with Government Code Section 66427.5.</p> <p>The city will also assist lower income tenants of mobile home parks to research the financial feasibility of purchasing their mobile home parks so as to maintain the rents at levels affordable to its tenants.</p>	○	<p>The city continues to implement the mobile home zoning ordinance. No applications for change in use or conversion of a mobile home park were received in 2019.</p>
1.3 - Acquisition/ Rehabilitation of Rental Housing	<p>The city will continue to provide assistance on a case-by-case basis to preserve the existing stock of lower and moderate income rental housing, including:</p> <ul style="list-style-type: none"> · Provide loans, grants, and/or rebates to owners of rental properties to make needed repairs and rehabilitation. · As financially feasible, acquire and rehabilitate rental housing that is substandard, deteriorating or in danger of being demolished. Set-aside at least 20 percent of the rehabilitated units for extremely- and/or very low income households. 	○	<p>Requests for acquisition/rehabilitation of rental properties are considered on a case by case basis.</p> <p>In Spring of 2019, the City Council approved the CDBG Annual Action Plan to authorize the purchase of existing affordable housing units in Carlsbad. In 2019, the city purchased three units with these funds in the Mulberry community of Bressi Ranch.</p>

Name of Program	Objective	Timeframe in H.E	Status of Program Implementation
	<p>As appropriate and determined by City Council, provide deferral or subsidy of planning and building fees, and priority processing. Priority will be given to repair and rehabilitation of housing identified by the city's Building Division as being substandard or deteriorating, and which houses lower income and in some cases moderate income households.</p>		
1.4 - Rehabilitation of Owner-Occupied Housing	<p>As the housing stock ages, the need for rehabilitation assistance may increase. The city will provide assistance to homeowners to rehabilitate deteriorating housing. Eligible activities under this program include such things as repairing faulty plumbing and electrical systems, replacing broken windows, repairing termite and dry-rot damage, and installing home weatherization improvements. Assistance may include financial incentives in the form of low interest and deferred payment loans, and rebates. Households targeted for assistance include lower-income and special needs (disabled, large, and senior) households.</p>	O	<p>The city has implemented a Minor Home Repair Grant Program for low-income owner-occupied properties that provides loans of up to \$5,000, which are forgiven after five years. In 2019, the city assisted one household.</p>
1.5 - Preservation of At-Risk Housing	<p>One project within the city—Santa Fe Ranch Apartments—may be considered as at risk if the owner pays off bonds early. While this is unlikely since the current income at affordable levels is not substantially lower than the potential income at market rates, the city will nonetheless monitor its status. Through monitoring, the city will ensure tenants receive proper notification of any changes. The city will also contact nonprofit housing developers to solicit interest in acquiring and managing the property in the event this or any similar project becomes at risk of converting to market rate.</p>	C	<p>In 2016, the property owners of the Santa Fe Ranch Apartments paid off the bonds, removing the affordability provisions. Given that there are no more "at risk" housing units in the city, this program is considered to be completed.</p>
2.1 - Adequate Sites to Accommodate the RHNA	<p>The city will continue to monitor the absorption of residential acreage in all densities and, if needed, recommend the creation of additional residential acreage at densities sufficient to meet the city's housing need for current and future residents. Any such actions shall be undertaken only where consistent with the Growth Management Plan.</p>	O	<p>The city reviews residential development applications for compliance with meeting the minimum densities on which the city relies to meet its share of regional housing needs. Consistent with state law and the city's land use policies, the city shall not approve applications below the minimum densities established in the Housing Element unless it makes the following findings:</p>

Name of Program	Objective	Timeframe in H.E	Status of Program Implementation
	<p>The analysis in Section 10.3 (Resources Available) identifies examples of how housing has been built on very small sites, such as in the Village and Barrio. However, to expand opportunities for additional affordable housing, the city will encourage the consolidation of small parcels in order to facilitate larger-scale developments that are compatible with existing neighborhoods. Specifically, the city will continue to make available an inventory of vacant and underutilized properties to interested developers, market infill and redevelopment opportunities throughout the city, including the Village and Barrio, and meet with developers to identify and discuss potential project sites.</p>		<p>a. The reduction is consistent with the adopted general plan, including the housing element.</p> <p>b. The remaining sites identified in the housing element are adequate to accommodate the city's share of the regional housing need pursuant to Government Code Section 65584.</p> <p>The city continues to make available an inventory of vacant and underutilized properties and works with interested developers on infill and redevelopment opportunities.</p>
<p>2.2 - Flexibility in Development Standards</p>	<p>The Planning Division, in its review of development applications, may recommend waiving or modifying certain development standards, or propose changes to the Municipal Code to encourage the development of low and moderate income housing. The city offers offsets to assist in the development of affordable housing citywide. Offsets include concessions or assistance including, but not limited to, direct financial assistance, density increases, standards modifications, or any other financial, land use, or regulatory concession that would result in an identifiable cost reduction.</p>	<p>O</p>	<p>The city considers density increases, waivers and modifications to development standards to assist in the development of affordable housing on a case by case basis.</p> <p>In 2019, the following projects were reviewed or approved and included density increases and/or modifications to development standards:</p> <ul style="list-style-type: none"> The city is currently reviewing the EIR 2018-0001 – Aviara Apartments, which is proposing a density increase of 105 units above the General Plan allocation of 224 units, for a total of 329 units. The project is currently proposing 82 affordable units, which exceeds the requirements of the Inclusionary Housing ordinance. The Aviara Apartments project proposal includes a request for a modification to the following development standards: building height, fence/wall height, parking ratios, side yard setback for carport structures, and parking lot perimeter landscape buffer requirements.
<p>2.3 - Mixed Use</p>	<p>The city will encourage mixed-use developments that include a residential component. Major commercial centers should incorporate, where appropriate, mixed commercial/residential uses.</p>	<p>O</p>	<p>The city considers mixed use developments on a case by case basis.</p> <p>The following mixed-use projects were under review or approved in the Village area in 2019:</p> <ul style="list-style-type: none"> RP 15-16 4 Plus 1 Luxury Living was approved, which includes four residential units and 1,105 square feet of commercial space.

Name of Program	Objective	Timeframe in H.E	Status of Program Implementation
			<ul style="list-style-type: none"> · SDP 2019-0015 Jefferson Street Apartments was under review, which proposes 15 residential units and 2,625 square feet of commercial space. · CT 2019-0003 Carlsbad Station was under review, which proposes 79 residential units and 9,777 square feet of commercial space. · CT 2018-0008 Grand Jefferson was under review, the city reviewed CT 2018-0008 Grand Jefferson, which proposes six residential units and 1,823 square feet of commercial space. <p>Outside of the Village area, the following mixed-use projects were under review or approved in 2019:</p> <ul style="list-style-type: none"> · EIR 2017-0001 – Marja Acres was under review, which proposes 248 townhomes, 46 senior affordable apartments, and 10,000 sf of commercial space and community recreation uses. · EIR 2018-0004 North County Plaza was under review, +which proposes to redevelop an existing shopping center by demolishing a portion of the center (approx. 40,000 sf of commercial space) and adding 272 apartment units, resulting in a mixed use site.
2.4 - Energy Conservation	<p>The city has established requirements, programs, and actions to improve household energy efficiency, promote sustainability, and lower utility costs. The city shall enforce state requirements for energy conservation, including the latest green building standards, and promote and participate in regional water conservation and recycling programs.</p> <ul style="list-style-type: none"> · Create a coordinated energy conservation strategy, including strategies for residential uses, as part of a citywide Climate Action Plan. · In the Village, encourage energy conservation and higher density development by the modification of development standards (e.g. parking standards, building setbacks, height, and increased density) as necessary to: <ul style="list-style-type: none"> - Enable developments to qualify for silver level or higher LEED (Leadership in Energy and Environmental Design) Certification, or a comparable green building rating, and to maintain the financial feasibility of the development with such certification. 	○	<p>The city continues to implement its 2015-adopted Climate Action Plan (CAP). In 2019, the City Council adopted ordinances identified in the CAP to promote energy efficiency and renewable energy use in new residential construction and in existing development undergoing major upgrades. The ordinances become fully enforceable on Jan. 1, 2020.</p> <p>In 2018, the California Building Standards Commission approved amendments to the California Energy Code requiring installation of photovoltaic systems in all new low-rise residential construction, beginning in January 2020. Carlsbad is enforcing this new Energy Code requirement as of Jan. 1, 2020.</p> <p>In 2019, 1,279 building permits for photovoltaic panels on residential structures were completed.</p>

Name of Program	Objective	Timeframe in H.E	Status of Program Implementation
	<ul style="list-style-type: none"> - Achieve densities at or above the minimum required if the applicant can provide acceptable evidence that application of the development standards precludes development at such densities. · Facilitate resource conservation for all households by making available, through a competitive process, CDBG funds to non-profit organizations that could use such funds to replace windows, plumbing fixtures, and other physical improvements in lower-income neighborhoods, shelters, and transitional housing. · Encourage infill development in urbanized areas, particularly in the Village and Barrio, through implementation of the Village Master Plan and Design Manual and the allowed density ranges in the Barrio. 		<p>In 2019, the city adopted the 2019 California Building Codes, which incorporates the latest energy efficiency standards as established by the CEC.</p> <p>In 2019, the city reviewed and approved several infill projects in the Village and Barrio areas (see comments in Programs 2.1 through 2.3 above.)</p>
3.1 - Inclusionary Housing Ordinance	<p>The city will continue to implement its Inclusionary Housing Ordinance, which requires a minimum of 15 percent of all ownership and qualifying rental residential projects of seven or more units be restricted and affordable to lower income households. This program requires an agreement between all residential developers subject to this inclusionary requirement and the city which stipulates:</p> <ul style="list-style-type: none"> · The number of required lower income inclusionary units; · The designated sites for the location of the units; · A phasing schedule for production of the units; and · The term of affordability for the units. 	O	<p>On Dec. 17, 2019, the City Council introduced Ordinance No. CS-368 to restore the city's ability to apply inclusionary housing requirements to residential rental units. Prior to passage of AB 1505 in 2017, cities and counties were barred from imposing affordable housing requirements to rental projects, as a result of the appellate court decision in <i>Palmer/Sixth St. Properties, L.P. v. City of Los Angeles</i>. AB 1505 revoked the Palmer decision by allowing cities to impose affordability restriction to new rental housing again.</p> <p>The city continues to implement its Inclusionary Housing Ordinance. In 2019, building permits were issued for 47 dwelling units that were required to be affordable through Inclusionary requirements for the following projects:</p> <ul style="list-style-type: none"> · Yada Farm – one low income ADU · Uptown Bressi Ranch – 17 low income condominiums · Poinsettia 61 – five low income ADUs

Name of Program	Objective	Timeframe in H.E	Status of Program Implementation
	<p>For all ownership and qualifying rental projects of fewer than seven units, payment of a fee in lieu of inclusionary units is permitted. The fee is based on a detailed study that calculated the difference in cost to produce a market rate rental unit versus a lower-income affordable unit. As of 2013, the in-lieu fee per market- rate dwelling unit was \$4,515. The fee amount may be modified by the City Council from time-to-time and is collected at the time of building permit issuance for the market rate units. The city will continue to utilize inclusionary in-lieu fees collected to assist in the development of affordable units.</p> <p>The city will apply Inclusionary Housing Ordinance requirements to rental projects if the project developer agrees by contract to limit rent as consideration for a "direct financial contribution" or other form of assistance specified in density bonus law; or if the project is at a density that exceeds the applicable GMCP density, thus requiring the use of "excess dwelling units," as described in Section 10.3 (Resources Available).</p>		<ul style="list-style-type: none"> · Magnolia Brady – one low income ADU · Miles Buena Vista – one low income ADU · Casa Aldea – 20 low income senior apartments · Beachwalk at Roosevelt – two low income condominiums <p>Work was completed on significant affordable housing projects that began construction in 2016:</p> <ul style="list-style-type: none"> · Construction was completed for the 101 unit low income senior apartments (Portola Senior Apartments) and 56 moderate income apartments (Montecito Apartments) in Robertson Ranch West Village Master Plan. <p>In 2019, building permits were issued for the following projects that were required to purchase Inclusionary Housing credits at existing affordable apartments:</p> <ul style="list-style-type: none"> · EIR 15-03 Poinsettia 61 – four credits · CT 2018-0001 Walnut Beach Homes – two credits · CY 2017-0002 Tyler Street Residences – one credit <p>In 2019, the in-lieu fee per market rate dwelling unit remained at \$4,515, which has not changed since 1996.</p>
3.2 - Excess Dwelling Units	<p>Pursuant to City Council Policy Statement 43, the city will continue to utilize "excess dwelling units," described in Section 10.3 (Resources Available), for the purpose of enabling density transfers, density increases/bonuses and General Plan amendments to increase allowed density.</p> <p>Based on analysis conducted in Section 10.4 (Constraints and Mitigating Opportunities), the city can accommodate its 2010-2020 RHNA without the need to utilize excess dwelling units to accommodate the RHNA at each household income level.</p>	○	<p>Through its continued implementation of the Growth Management Plan, the city tracks development and the Excess Dwelling Unit Bank in its monthly Development Monitoring Report. As of December 2019, the excess unit balance was 533 dwelling units inside the Village and 425 units outside of the Village. These units are available for qualifying projects, which include affordable housing and density bonuses.</p>

Name of Program	Objective	Timeframe in H.E	Status of Program Implementation
3.3 - Density Bonus	<p>Consistent with state law (Government Code sections 65913.4 and 65915), the city continues to offer residential density bonuses as a means of encouraging affordable housing development. In exchange for setting aside a portion of the development as units affordable to lower and moderate income households, the city will grant a density bonus over the otherwise allowed maximum density, and up to three financial incentives or regulatory concessions. These units must remain affordable for a period of no less than 30 years and each project must enter into an agreement with the city to be monitored by the Housing and Neighborhood Services Division for compliance.</p> <p>The density bonus increases with the proportion of affordable units set aside and the depth of affordability (e.g. very low income versus low income, or moderate income). The maximum density bonus a developer can receive is 35 percent when a project provides 11 percent of the units for very low income households, 20 percent for low income households, or 40 percent for moderate income households.</p> <p>Financial incentives and regulatory concessions may include but are not limited to: fee waivers, reduction or waiver of development standards, in-kind infrastructure improvements, an additional density bonus above the requirement, mixed use development, or other financial contributions.</p> <p>The city is currently amending its density bonus regulations (Municipal Code Chapter 21.86) to ensure consistency with recent changes to state density bonus law.</p>	O/C	<p>The city continues to make available density bonuses in compliance with state density bonus law (SDBL). In 2019, six SDBL applications were either received or under review:</p> <ul style="list-style-type: none"> - EIR 2017-0001 Marja Acres, which proposes 248 townhomes, 46 affordable senior apartments and 10,000 sf of commercial space. - SDP 2018-0004 Romeria Pointe Apartments, which proposes 3 very low units and 20 market rate units. - EIR 2018-0004 North County Plaza, which proposes to redevelop an existing shopping center by demolishing a portion of the center (approx. 40,000 sf of commercial space) and adding 272 apartment units, resulting in a mixed use site. - SDP 2018-0022 Resort View Apartments, which proposes 4 low income units and 22 market rate units. - CT 2019-0003 Carlsbad Station, which proposes 12 low income units and 67 market rate units. - SDP 2019-0015 Jefferson Street Apartments which proposes 3 low income and 15 market rate units. <p>The city also offers density increases through its inclusionary housing program as provided for in Municipal Code Chapter 21.85, see Program 2.2 – Flexibility in Development Standards.</p>

Name of Program	Objective	Timeframe in H.E	Status of Program Implementation
			The city's density bonus regulations (Municipal Code Chapter 21.86) have been amended consistent with state law through 2019. These amendments had their first reading on 12/17/19 and were approved by the city council 1/28/20. Additional revisions are being prepared for consistency with state law changes through 2020.
3.4 - City-Initiated Development	The city, through the Housing and Neighborhood Services Division, will continue to work with private developers (both for-profit and non-profit) to create housing opportunities for low, very low and extremely low income households.	○	The city continues to provide information and work with developers to assist them in creating additional housing opportunities for lower income households.
3.5 - Affordable Housing Incentives	<p>The city will consider using Housing Trust Funds on a case-by-case basis to offer a number of incentives to facilitate affordable housing development. Incentives may include:</p> <ul style="list-style-type: none"> · Payment of public facility fees; · In-kind infrastructure improvements, including but not limited to street improvements, sewer improvements, other infrastructure improvements as needed; · Priority processing, including accelerated plan-check process, for projects that do not require extensive engineering or environmental review; and · Discretionary consideration of density increases above the maximum permitted by the General Plan through review and approval of a site development plan (SDP). 	○	The city continues to offer incentives to facilitate affordable housing, including those listed in Program 2.2 above and Program 3.5.
3.6 - Land Banking	The city will continue to implement a land banking program to acquire land suitable for development of housing affordable to lower and moderate income households. The land bank may accept contributions of land in-lieu of housing production required under an inclusionary requirement, surplus land from the city or other public entities, and land otherwise acquired by the city for its housing programs. This land would be used to reduce the land costs of producing lower and moderate income housing by the city or other parties.	○	The city continues to implement a land banking program to acquire land suitable for development of housing affordable to lower and moderate income households. In 2019, there were no offers to donate land for affordable housing.

Name of Program	Objective	Timeframe in H.E	Status of Program Implementation
	<p>The city has identified a list of nonprofit developers active in the region. When a city-owned or acquired property is available, the city will solicit the participation of these nonprofits to develop affordable housing. Affordable housing funds will be made available to facilitate development and the city will assist in the entitlement process.</p>		
<p>3.7 - Housing Trust Fund</p>	<p>The city will continue to maintain the Housing Trust Fund for the fiduciary administration of monies dedicated to the development, preservation and rehabilitation of affordable housing in Carlsbad. The Housing Trust Fund will be the repository of all collected in-lieu fees, impact fees, housing credits, loan repayments, and related revenues targeted for proposed housing as well as other local, state and federal funds.</p> <p>The city will explore additional revenue opportunities to contribute to the Housing Trust Fund, particularly, the feasibility of a housing impact fee to generate affordable rental units when affordable units are not included in a rental development.</p>	<p>O</p>	<p>The city continues to maintain the Housing Trust Fund, which had a total balance of approximately \$17.8 million as of December 31, 2019. However, the available balance is approximately \$13.6 million as the city had committed \$4.25 million for the affordable Oak Veterans Housing and Harding Veterans Housing projects in 2017.</p> <p>In 2019, the city did not approve any requests for Housing Trust Fund money for affordable housing projects.</p>
<p>3.8 - Section 8 Housing Choice Vouchers</p>	<p>The Carlsbad Housing Authority will continue to administer the city's Section 8 Housing Choice Voucher program to provide rental assistance to very low income households.</p>	<p>O</p>	<p>The Housing Authority continues to operate Section 8 Housing Choice Voucher Program. The \$6.5 million federally funded program assisted approximately 600 households in 2019.</p>
<p>3.9 - Mortgage Credit Certificates</p>	<p>The city participates in the San Diego Regional Mortgage Credit Certificate (MCC) Program. By obtaining a MCC during escrow, a qualified homebuyer can qualify for an increased loan amount. The MCC entitles the homebuyer to take a federal income tax credit of 20 percent of the annual interest paid on the mortgage. This credit reduces the federal income taxes of the buyer, resulting in an increase in the buyer's net earnings.</p>	<p>C</p>	<p>The city no longer participates in the MCC Program.</p>
<p>3.10 - Senior Housing</p>	<p>The city will continue to encourage a wide variety of senior housing opportunities, especially for lower-income seniors with special needs, through the provision of financial assistance and regulatory incentives as specified in the city's Housing for Senior Citizens Ordinance (Municipal Code Chapter 21.84). Projects assisted with these incentives will be subjected to the monitoring and reporting requirements to assure compliance with approved project conditions.</p>	<p>O</p>	<p>The city continues to encourage senior housing opportunities through financial assistance and regulatory incentives.</p>

Name of Program	Objective	Timeframe in H.E	Status of Program Implementation
	<p>In addition, the city has sought and been granted California Constitution Article 34 authority by its voters to produce up to 200 senior-only, low-income restricted housing units. The city would need to access its Article 34 authority only when it provides financial assistance and regulates more than 51 percent of the development.</p>		<p>In 2019, progress was made on the following senior housing projects:</p> <ul style="list-style-type: none"> · Casa Aldea/Cannon Road Senior Housing (MP 02-03(H)/ SDP 15-19) - the city issued building permits in 2019 and the project is currently under construction. The project consists of 98 unit senior apartments, of which 20 units will be restricted to low income residents. · As part of the inclusionary requirement for the Robertson Ranch West Village Master Plan, construction was completed for the 101 unit Portola Senior Apartments. The project includes one and two bedroom units that are restricted to 70 percent of AMI, and is now open and completely leased up. · The city reviewed an application for EIR 2017-0001 – Marja Acres, which proposes 46 senior affordable apartments as part of a mixed use project.
<p>3.11 - Housing for Persons with Disabilities</p>	<p>The city has an adopted ordinance to provide individuals with disabilities "reasonable accommodation" in land use, zoning and building regulations. This ordinance seeks to provide equal opportunity in the development and use of housing for people with disabilities through flexibility in regulations and the waiver of certain requirements in order to eliminate barriers to fulfilling this objective.</p> <p>The city will continue to evaluate the success of this measure and adjust the ordinance as needed to ensure that it is effective. Moreover, the city will seek to increase the availability of housing and supportive services to the most vulnerable population groups, including people with disabilities through state and federal funding sources, such as HUD's Section 811 program and CDBG funding.</p>	<p>○</p>	<p>The city continues to consider requests for "reasonable accommodation" in land use, zoning and building regulations on a case by case basis. One reasonable accommodation request was received in 2019.</p>
<p>3.12 - Housing for Large Families</p>	<p>In those developments that are required to include 10 or more units affordable to lower-income households, at least 10 percent of the lower income units should have three or more bedrooms. This requirement does not pertain to lower-income senior housing projects.</p>	<p>○</p>	<p>The city continues to implement this program as part of its inclusionary housing ordinance. In 2019, 13 permits were issued for three-bedroom affordable units.</p>
<p>3.13 - Housing for the Homeless</p>	<p>Carlsbad will continue to facilitate and assist with the acquisition, for lease or sale, and development of suitable sites for emergency shelters and transitional housing for the homeless population. This facilitation and assistance will include:</p>	<p>○</p>	<ul style="list-style-type: none"> · Solutions for Change continues to operate a 16-unit apartment complex that provides permanent affordable housing opportunities for homeless families who have graduated from the Solutions University. In 2015, the property was acquired (with financial help from the city) and families began moving into the property. · Catholic Charities continues to operate the La Posada de Guadalupe emergency shelter, of which a portion of the facility (50 beds) is devoted to serving homeless men.

Name of Program	Objective	Timeframe in H.E	Status of Program Implementation
	<ul style="list-style-type: none"> · Participating in a regional or sub-regional summit(s) including decision-makers from north San Diego County jurisdictions and SANDAG for the purposes of coordinating efforts and resources to address homelessness; · Assisting local non-profits and charitable organizations in securing state and federal funding for the acquisition, construction and management of shelters; and · Continuing to provide funding for local and sub-regional homeless service providers that operate temporary and emergency shelters. 		<ul style="list-style-type: none"> · The city continues to implement the Homeless Response Plan, which has established key principles and system responses that the city employs to address the community impacts of homelessness. The plan provides strategies to: <ol style="list-style-type: none"> 1. Prevent, reduce and manage homelessness in Carlsbad; 2. Support and build capacity within the city and community to address homelessness; 3. Encourage collaboration within the city, community partnerships and residents; and 4. Retain, protect and increase the supply of housing. · In 2018, a Housing Set-Aside pilot program was launched at the city-owned Tyler Court senior affordable apartment community whereby ten (10) units were set-aside specifically for formerly homeless seniors. Staff identified and transitioned six (6) individuals into permanent housing. The pilot program was discontinued in summer 2019. As of Dec. 31, 2019, five of those residents were still successfully housed at Tyler Court.
3.14 - Supportive Services for Homeless and Special Needs Groups	The city will continue to provide CDBG funds to community, social welfare, non-profit and other charitable groups that provide services for those with special needs in the north San Diego County area. Furthermore, the city will work with agencies and organizations that receive CDBG funds to offer a city referral service for homeless shelter and other supportive services.	○	During the 2019-2020 CDBG program year, the city allocated \$74,872 in funding assistance to five social service providers in North County which provide shelters and support services for the homeless community.
3.15 - Alternative Housing	The city will continue to implement its Second Dwelling Unit Ordinance (Section 21.10.015 of the Carlsbad Municipal Code) and will continue to support alternative types of housing, such as hotels and managed living units to accommodate extremely-low income households.	○	<p>The city continues to implement the Second Dwelling Unit Ordinance and consider alternative types of housing. In 2019, building permits were issued for 33 accessory dwelling units.</p> <p>The city is currently in process preparing zoning code amendments to address changes in state laws pertaining to accessory dwelling units that were signed into law in 2019 and became effective January 1, 2020 (SB 13, AB 68, AB 881, AB 670, AB 587 and AB 671).</p> <p>A one-year seniors home share matching program was launched in 2019. Seven residents were matched to a home provider during the year.</p>

Name of Program	Objective	Timeframe in H.E	Status of Program Implementation
3.16 - Military and Student Referrals	The city will assure that information on the availability of assisted or below-market housing is provided to all lower-income and special needs groups. The Housing and Neighborhood Services Division will provide information to local military and student housing offices of the availability of low-income housing in Carlsbad.	O	The city provides information on assisted and below market housing to individuals and groups needing that information.
3.17 - Coastal Housing Monitoring	<p>As a function of the building permit process, the city will monitor and record Coastal Zone housing data including, but not limited to, the following:</p> <ol style="list-style-type: none"> 1. The number of housing units approved for construction, conversion or demolition within the coastal zone after January 1, 1982. 2. The number of housing units for persons and families of low or moderate income, as defined in Section 50093 of the Health and Safety Code, required to be provided in new housing developments within the coastal zone. 3. The number of existing residential dwelling units occupied by persons and families of low or moderate income that are authorized to be demolished or converted in the coastal zone pursuant to Section 65590 of the Government Code. 4. The number of residential dwelling units occupied by persons and families of low or moderate income, as defined in Section 50093 of the Health and Safety Code that are required for replacement or authorized to be converted or demolished as identified above. The location of the replacement units, either onsite, elsewhere within the city's coastal zone, or within three miles of the coastal zone in the city, shall be designated in the review. 	O	<ol style="list-style-type: none"> 1. In 2019, building permits were issued for 77 dwelling units in the Coastal Zone: <ul style="list-style-type: none"> · Four units in 2-4 unit structures · 16 accessory dwelling units · Eight single family attached dwellings · 49 single family detached dwellings 2. In 2019, building permits were issued for five accessory dwelling units that were required to be affordable at the low income level through the Inclusionary Housing Ordinance (as a part of the EIR 15-03 Poinsettia 61 project). 3. None. 4. None.
	First, to retain the Housing Element as a viable policy document, the Planning Division will review the Housing Element annually and schedule an amendment if necessary. As required by state law, city staff will prepare and submit annual progress reports to the City Council, SANDAG, and California Department of Housing and Community Development (HCD).		The city will continue its annual reporting.

Name of Program	Objective	Timeframe in H.E	Status of Program Implementation
<p>3.18 - Housing Element Annual Progress Report and Mid-Planning Period Housing Element Update</p>	<p>Second, Senate Bill 575 requires that a jurisdiction revise its housing element every four years, unless it meets both of the following criteria: (1) the jurisdiction adopted the fourth revision of the element no later than March 31, 2010; and (2) the jurisdiction completed any rezoning contained in the element by June 30, 2010. While implementation of the city's 2005-2010 Housing Element satisfied the first criterion, it did not meet the second. Although rezoning was completed before the end of the extended Housing Element period (April 30, 2013) to satisfy the adequate sites program, it was not completed in time to meet the SB 575 requirement.</p> <p>The city will build on the annual review process to develop a mid-planning period (four-year) Housing Element update that includes the following:</p> <ul style="list-style-type: none"> · Review program implementation and revision of programs and policies, as needed; · Analysis of progress in meeting the RHNA and updates to the sites inventory as needed; · Outcomes from a study session that will be held with the Planning Commission to discuss mid-period accomplishments and take public comment on the progress of implementation. The city will invite service providers and housing developers to participate. 	<p>O</p>	<p>The mid-planning period (2017-2021) Housing Element update was completed in 2017. On December 20, 2016, HCD issued a letter stating that the update meets the statutory requirements of State housing element law, and the Housing Element update was adopted by the City Council in March 2017.</p> <p>The city has selected a consultant for the 2021-2029 Housing Element update and kick-off meetings are scheduled for February 2020.</p>
<p>4.1 - Fair Housing Services</p>	<p>With assistance from outside fair housing agencies, the city will continue to offer fair housing services to its residents and property owners. Services include:</p> <ul style="list-style-type: none"> · Distributing educational materials to property owners, apartment managers, and tenants; · Making public announcements via different media (e.g. newspaper ads and public service announcements at local radio and television channels); · Conducting public presentations with different community groups; · Monitoring and responding to complaints of discrimination (i.e. intaking, investigation of complaints, and resolution); and · Referring services to appropriate agencies. 	<p>O</p>	<p>With the assistance of a CDBG grant, the city contracts with the Legal Aid Society of San Diego (LASSD), a non-profit organization dedicated to serving the needs of our community, to provide their services to Carlsbad residents and property owners. LASSD serves as advocates for fair housing and mediating tenant/landlord issues. Through the Fair Housing Initiatives Program, LASSD assists clients with potential discrimination claims and will provide guidance on fair housing laws. Annually, residents are invited to call LASSD at no charge and receive assistance.</p>

Jurisdiction	Carlsbad	
Reporting Period	2019	(Jan. 1 - Dec. 31)

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Housing Element Implementation
 (CCR Title 25 §6202)

Table F									
Units Rehabilitated, Preserved and Acquired for Alternative Adequate Sites pursuant to Government Code section 65583.1(c)(2)									
This table is optional. Jurisdictions may list (for informational purposes only) units that do not count toward RHNA, but were substantially rehabilitated, acquired or preserved. To enter units in this table as progress toward RHNA, please contact HCD at APR@hcd.ca.gov. HCD will provide a password to unlock the grey fields. Units may only be credited to the table below when a jurisdiction has included a program in its housing element to rehabilitate, preserve or acquire units to accommodate a portion of its RHNA which meet the specific criteria as outlined in Government Code section 65583.1(c)(2).									
Activity Type	Units that Do Not Count Towards RHNA*				Units that Count Towards RHNA*				The description should adequately document how each unit complies with subsection (c)(2) of
	Extremely Low-Income*	Very Low-Income*	Low-Income*	TOTAL UNITS*	Extremely Low-Income*	Very Low-Income*	Low-Income*	TOTAL UNITS*	
Rehabilitation Activity				0					
Preservation of Units At-Risk				0					
Acquisition of Units				0					
Total Units by Income	0	0	0	0					

Jurisdiction	Carlsbad	
Reporting Year	2019	(Jan. 1 - Dec. 31)

Building Permits Issued by Affordability Summary		
Income Level		Current Year
Very Low	Deed Restricted	0
	Non-Deed Restricted	2
Low	Deed Restricted	47
	Non-Deed Restricted	2
Moderate	Deed Restricted	0
	Non-Deed Restricted	59
Above Moderate		212
Total Units		322

Note: Units serving extremely low-income households are included in the very low-income permitted units totals

Housing Applications Summary	
Total Housing Applications Submitted:	51
Number of Proposed Units in All Applications Received:	436
Total Housing Units Approved:	30
Total Housing Units Disapproved:	0

Use of SB 35 Streamlining Provisions	
Number of Applications for Streamlining	0
Number of Streamlining Applications Approved	0
Total Developments Approved with Streamlining	0
Total Units Constructed with Streamlining	0

Units Constructed - SB 35 Streamlining Permits			
Income	Rental	Ownership	Total
Very Low	0	0	0
Low	0	0	0
Moderate	0	0	0
Above Moderate	0	0	0
Total	0	0	0

Cells in grey contain auto-calculation formulas

Description of Terms and Methods

2019 HOUSING ELEMENT ANNUAL PROGRESS REPORT

Regional Housing Needs – The determination of housing need for Carlsbad and all other jurisdictions in California is derived from the Regional Housing Needs Assessment (RHNA) prepared by the local regional councils of government (SANDAG) before the beginning of each housing cycle. Based upon these assessments of *need*, the local jurisdictions are required to adopt housing *objectives* in the housing elements of their general plans.

A regional assessment of housing need is an estimate of the total need for new housing construction throughout the region due to population growth forecasted to occur during a specific time period. The overall housing need is then broken out by four income groups: *very low, low, moderate, and above-moderate* (or *upper-income*) – all as defined by the federal Department of Housing and Urban Development (HUD), and the state Department of Housing and Community Development (HCD). The regional housing needs are then allocated to the local jurisdictions on a “regional share” basis, according to models and formulas designed by SANDAG.

Table 1 shows Carlsbad’s share of the current RHNA and is based upon housing growth estimated by the State and SANDAG to occur in Carlsbad during the period January 1, 2010 through Dec. 31, 2020.

TABLE 1: CARLSBAD’S SHARE OF THE RHNA January 1, 2010 through Dec. 31, 2020*		
Income Group	Definition** (% of AMI***)	New Construction Needs (in housing units)
Very Low	50% or under	912
Low	51-80%	693
Moderate	81-120%	1,062
Above-Moderate	Over 120%	2,332
Totals		4,999

*SANDAG, RHNA PLAN: Fifth Housing Element Cycle Planning for Housing in the San Diego Region 2010 – 2020, Table 4.
 **Definitions are from HUD, via the California Department of Housing and Community Development.
 ***AMI is the Area Median Income. The 2019 AMI for San Diego-Carlsbad MSA for a family of four is \$86,300.

Definition of Income Groups – Table 1 defines each of the four income groups as a percentage of the county area median income (AMI). HUD annually revises the AMI based on cost of living issues such as the relationship of housing prices to income. For 2019, HUD established the AMI for San Diego County at \$86,300. In addition to establishing the AMI, HUD also establishes income limits for each of the four income groups which are adjusted for family size so that larger households have higher income limits (see Table 2 below).

Table 2: CY 2019 qualifying limits on annual income by household size				
Income Group	Persons per household			
	2	4	6	8
Very Low	\$42,800	\$53,500	\$62,100	\$70,650
Low	\$68,500	\$85,600	\$99,300	\$113,000
Moderate	\$82,850	\$103,550	\$120,150	\$136,700
Above Moderate	> \$ 82,850	> \$103,550	> \$ 120,150	> \$ 136,200
Source: "2019 Household Income Limits", U.S. Department of Housing and Urban Development (effective April 24, 2019)				

Prices of Affordable Housing – Generally, the federal and state rule is that housing is affordable to a given family if the family pays no more than 30% of its monthly income for housing expenses that include the rent or mortgage payment, property taxes, insurance, utilities, and the like. A determination of whether a housing unit is affordable can be easily made for *assisted public* rental housing and other *public* housing programs because documentation is maintained on both the individual household’s income and the actual cost of the unit in question (typically rental). Income group determinations for income restricted (*assisted*) housing units shown in the tables of Part 1 were made by the Carlsbad Housing and Neighborhood Services Department.

To determine affordable housing expenses for rentals, the practice is to set thresholds for each income group, using the 30% rule, with adjustments for the number of bedrooms (a convention developed in 1993 by member agencies of the San Diego Association of Governments assumes two persons per bedroom). An additional adjustment is also made for utility allowance, as required by HUD. Table 3 provides the resulting maximum market rate rental expenses (which include rent and a utility allowance that increases with household size) for the very low, low, and moderate-income groups for CY 2019.

Table 3: CY 2019 qualifying rent and utility expenses by number of bedrooms				
Income Group	Number of bedrooms			
	1	2	3	4
Very Low	\$1,070	\$1,337	\$1,552	\$1,766
Low	\$1,712	\$2,140	\$2,482	\$2,825
Moderate	\$2,071	\$2,588	\$3,003	\$3,417
Above Moderate	> \$2,071	> \$ 2,588	> \$ 3,003	> \$ 3,417
Source: "2019 Household Income Limits", U.S. Department of Housing and Urban Development (effective April 24, 2019)				

With regard to for-sale housing, there is no federal or state required formula to determine the sales price that would be considered affordable. The only federal or state requirement is that the mortgage amount (including taxes, insurance, utilities, etc.) must not exceed 30% of the

monthly income of the household (to be considered affordable to a specific income group, see Table 2).

The varying factors (interest rates, closing costs, lending programs, etc.), which impact the mortgage amount, make it difficult to specify certain sales prices that are considered affordable to the various income groups. To simplify determining affordability for reporting purposes, the city uses a rule-of-thumb formula similar to that employed by many mortgage-lending institutions, which was reviewed and accepted by the SANDAG and the California Department of Housing and Community Development. The rule-of-thumb formula is as follows:

Affordable sales price = 3.0 x maximum-allowed-annual income for each class, adjusted for bedroom count.

Based on this formula Table 4 gives the qualifying purchase price for housing for the different income groups. The table illustrates that a three-bedroom house costing no more than \$360,450 would be the maximum affordable to a moderate-income family.

Table 4: CY 2019 qualifying purchase price by number of bedrooms				
Income Group	Number of bedrooms			
	1	2	3	4
Very Low	\$128,400	\$160,500	\$186,300	\$211,950
Low	\$205,500	\$256,800	\$297,900	\$339,000
Moderate	\$248,550	\$310,650	\$360,450	\$410,100
Above Moderate	> \$ 248,550	> \$ 310,650	> \$ 360,450	> \$ 410,100

* 3X multiplier was developed by an ad hoc committee at SANDAG with subsequent approval by the SANDAG Board in 1993. (There is no formula in state law). The rule also assumes 2 persons per bedroom to provide a correspondence back to HUD affordability rules based upon persons per household (as opposed to bedrooms).

Other terms – Definitions for terms used in this appendix as well as Part 1 of the report:

- *Apartment* – A multi-family unit that can be rented but not individually owned.
- *Assistance Programs/Assisted Units* – units receiving financial assistance from the city or other and/or other subsidy sources and have affordability deed restrictions.
- *Condominium* – A detached or attached home that can be purchased on commonly owned property irrespective of the unit category (see below).
- *Deed Restricted Units* – units considered affordable due to local program or policy, such as inclusionary housing ordinance. These units may also be assisted units.
- *Duplex* – Two units on a single lot. Units cannot be individually sold.
- *Non-deed Restricted Units/Market Rate Units* – Units that received no financial assistance from the city and have no affordability restrictions.
- *Unit Category* – According to HCD’s instructions for Housing Element Progress Reports, unit categories are as follows:
 - *Single Family-Detached Unit (SFD)* - a one-unit structure with open space on all four sides. The unit often possesses an attached garage.

- *Single Family-Attached Unit (SFA) - a one-unit structure attached to another unit by a common wall, commonly referred to as a townhouse, half-plex, or row house. The shared wall or walls extend from the foundation to the roof with adjoining units to form a property line. Each unit has individual heating and plumbing systems.*
- *2-, 3-, and 4-Plex Units per Structure (2-4) - a structure containing two, three, or four units and not classified as single-unit attached structure.*
- *5 or More Units per Structure (5+) - a structure containing five or more housing units.*
- *Accessory Dwelling Unit (ADU) - means a unit that is attached, detached or located within the living area of the existing dwelling or residential dwelling unit which provides complete independent living facilities for one or more persons. It shall include permanent provisions for living, sleeping, eating, cooking, and sanitation on the same parcel on which the single-family dwelling is situated pursuant to Government Code section 65852.2. An ADU also includes the following: an efficiency unit, as defined in Section 17958.1 of the Health and Safety Code or a manufactured home, as defined in Section 18007 of the Health and Safety Code.*