

Department of Housing and Community Development  
Director Correspondence Unit

DIVISION: Housing Policy Develop  
ASSIGNED TO: Kimberley Dellinger

AGENCY NUMBER:  
LOG NUMBER: 5851

FROM: Michael Holzmiller Z  
2075 Las Palmas Drive  
Carlsbad Ca 920091577

DATE ENTERED: 11-14-95

SUBJECT: Carlsbad Housing Element - Annual Progress Report

DATE ASSIGNED: 11-14-95 DATE DUE: 11-28-95 DATE COMPLETED: 3/19/96

ACTION: Reply direct

DIRECTORATE COMMENTS:

DIVISION COMMENTS:

SECTION COMMENTS:

When mailed/completed, return this transmittal form with three complete copies to the Director's Correspondence Unit.

11/15

Assigned by: Creswell Division/Unit Assignment  
No Response Necessary: \_\_\_\_\_

Assigned to: Rob Telephone Response: \_\_\_\_\_

Please complete and return this assignment by: \_\_\_\_\_

Prepared by: \_\_\_\_\_ Reviewed by: \_\_\_\_\_ Reviewed by: \_\_\_\_\_ Reviewed by: \_\_\_\_\_

Name: Rob Name: Creswell Name: \_\_\_\_\_ Name: \_\_\_\_\_

Date: 3/15/96 Date: 3/18/96 Date: 1/1 Date: 1/1



**DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT**  
**DIVISION OF HOUSING POLICY DEVELOPMENT**

1800 THIRD STREET, Room 430  
P.O. BOX 952053  
SACRAMENTO, CA 94252-2053  
(916) 323-3176 FAX (916) 327-2843



March 19, 1996

Mr. Michael J. Holzmilller  
Planning Director  
City of Carlsbad  
2075 Las Palmas Drive  
Carlsbad, California 92009-1576

Dear Mr. Holzmilller:

**RE: Filing Annual Reports**

Thank you for your recent letter to former Director Timothy L. Coyle, requesting copies of forms and definitions for an filing annual report required pursuant to Government Code Section 65400. Your letter accompanied Carlsbad's annual report for fiscal year 1994/95. We apologize for the delay in responding to your inquiry.

We compliment you on the quality of Carlsbad's annual reports. We have been impressed with the detail and effort associated with Carlsbad's annual report, and when other jurisdictions ask for examples of thorough, well-written reports, we have often referred to Carlsbad's reports.

This Department has begun work on preparing the required forms and definitions to be used by local jurisdictions for reporting on progress in addressing regional housing needs for new construction as required by Chapter 1235, Statutes of 1994. Unfortunately, other statutory responsibilities and reduced staff resources have prevented us from completing the forms at this time. We will, however, consult with jurisdictions and provide any technical assistance to facilitate local efforts to prepare annual reports.

We suggest you continue with your efforts in addressing annual reporting requirements. Your existing reports are thorough and provide a good picture of housing activities in Carlsbad. If you have any questions about the annual reporting requirements, please feel free to contact Robert Maus, of our staff, at (916) 327-2640.

Sincerely,

  
Kimberley L. Dellinger  
Deputy Director



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1996 City of  
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Name: Rob Name: Creswell Name: \_\_\_\_\_ Name: \_\_\_\_\_

Date: 3 11 1996 Date: 3 11 1996 Date: 1 1 Date: 1 1



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**DIVISION OF HOUSING POLICY DEVELOPMENT**

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March 19, 1996

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Sincerely,

A handwritten signature in black ink, appearing to read "Kimberley L. Dellinger".

Kimberley L. Dellinger  
Deputy Director





# City of Carlsbad

RECEIVED  
HOUSING AND  
COMMUNITY DEVELOPMENT  
95 NOV Planning Department

November 6, 1995

*DOE  
APD*

Tim Coyle, Director  
California Dept. of Housing and Community Development  
1800 Third St., Room 430  
Sacramento, CA 94252-2053

## CARLSBAD HOUSING ELEMENT - ANNUAL PROGRESS REPORT (7/94 - 6/95)

The California Legislature modified Government Code Section 65400 again last year, deleting the requirement to provide state offices with copies of subsequent annual progress reports on general plans and their housing elements. Nevertheless, we are pleased to forward a copy of this year's housing element report to you anyway for your information and records. We prepared our report based upon the old due-date of October 1. Our reporting period, therefore, is July 1, 1994 - June 30, 1995.

We note that between 1990 and 1994 Section 65400 has been modified four times. These frequent changes mean that from one year to the next it is sometimes difficult to track what the current requirements are. With the legislature's 1994 change we understand that the following was added to the Government Code.

**"(2) The annual report required pursuant to this subdivision shall be prepared through the use of forms and definitions adopted by the Department of Housing and Community Development . . . This report shall be provided to the legislative body on or before July 1 of each year."**

We are unaware of Housing and Community Development having published "forms and definitions" for the current report, but urge that such be made available in time for the preparation of the next annual report. Because the law now pushes forward the due date for reporting to local legislative bodies by three months (from October 1 to July 1), we will need to move our reporting period forward an equal period to allow for the usual data reduction, report preparation, presentations to commissions, and setting of Council dockets. Therefore, we will probably have to use a reporting period of July 1, 1995 - May 31, 1996 for our next report. It would be very helpful if Housing and Community Development could publish the required forms and definitions in sufficient time for their use within this time frame.

Should your office have any comments or questions regarding this year's annual report please feel free to contact Principal Planner Dennis Turner of this office at (619) 438-1161 ext. 4443.

Sincerely,

*Michael J. Holzmueller*  
**MICHAEL J. HOLZMILLER**  
Planning Director

MJH:DAT:kr

Attachment: Housing Element Annual Progress Report (7/94 - 6/95)



1

2

3

**Housing Element**  
**ANNUAL PROGRESS REPORT**

**(7/94 - 6/95)**

**CITY OF CARLSBAD**  
**California**

**Prepared By**

**Housing and Redevelopment Department**  
**Planning Department**

**September 1995**



# HOUSING ELEMENT - ANNUAL PROGRESS REPORT

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## EXECUTIVE SUMMARY

This document constitutes the second written annual progress report on the City of Carlsbad's Housing Element, a part of its General Plan. Its purpose is to provide the basis for tracking the progress which the City is making in implementing the numerous specific programs which were designed to achieve the element's goals and objectives. This document is intended for the use and information of: the City's elected and appointed officials, the City's management and staff, the citizens of Carlsbad, officials and staff of state agencies (including the Governor's Office of Planning and Research and the Housing and Community Development Department), and all other persons who are interested in housing issues in Carlsbad.

Pursuant to state law, housing elements are prepared and updated on a five-year cycle. This housing element was prepared on a housing cycle which began on July 1, 1991 and was originally scheduled to conclude on June 30, 1996. A 1993 change to state law, however, has extended this cycle to June 30, 1998, so the actual cycle will be seven years.

This document reports the progress of the City for FY 1994-1995 (ending June 30, 1995).

The heart of the Housing Element is its "policy section". The policy section consists of six over-all goals, 35 objectives, 15 policies, and 51 programs. The 51 programs are the subject of this document. A hierarchical relationship exists between the goals, objectives, policies and programs, which relationship is described in the first pages of this document. Then follows a complete listing of all of the goals, objectives, policies, and programs. Under each program is listed important information, including: the funding sources, the lead agency or department assigned to undertake the program, the original target year for implementing or completing the program, and, most importantly for this report, the progress achieved in the current 1994-1995 reporting period. For many programs this last section also gives cumulative progress since the beginning of the five-year housing cycle. For ease in reading the "progress" sections are set out in highlighted type.

### Summary of Progress:

Measuring and reporting progress varies with the different types of Housing Element programs. Some of the programs are one-time projects with discrete beginnings and ends. For these, staff has indicated that the program has either been completed or not. Other programs are simply "on-going" (for example, the City continually monitors Coastal Zone development activity under Program 2.6). Still others are combinations. For example, Program 1.4 Rental Monitoring requires the creation of an automated computer system (including collection and loading of data on existing development) as a one-time project, followed by setting up an ongoing program to update the data and create periodic reports.

Because of these differences, annual and cumulative progress is reported in several ways. Table 1 (Summary of Progress on Programs), found below, summarizes the progress on all 51 programs for the current reporting period. Code letters in the right-hand column of the table indicate the status of the program (see below for a key to the codes).

Additional information is found in the two appendices to this report.

Appendix 1 provides data on each of the 295 new housing units which completed construction within the City during the July 1994 - June 1995 reporting period. Of the new units, 235 were either for-sale or custom-built single-family homes. Fifty eight condominiums were built, as were two "second units". No rental apartments completed construction. How affordable was this new housing? None of the units were affordable to very low-income households, two units were affordable to low-income households (the "second units"), and two units were affordable to moderate-income households. The balance of the 295 units were affordable only to "other" households. Therefore, the City made only

very limited progress towards its housing goals for the targeted income groups during this reporting period. (A summary table showing these and historical data is provided in the main report with Program 2.1.)

Appendix 2 provides information on all of the development projects which the City is currently reviewing or has approved and which must provide some amount of housing affordable to lower-income households under the City's inclusionary housing program. Although several projects with inclusionary housing requirements have been approved, and several hundred units were in construction during the reporting period, none completed construction. These inclusionary housing projects will be the principle means in the future by which the City will achieve progress on its objectives for lower income affordable housing.

Table 1: SUMMARY OF PROGRESS ON PROGRAMS

"Status" code letters mean the following:

OM	<u>O</u> ngoing <u>m</u> onitoring program continues to be implemented.
OP	<u>O</u> ngoing <u>p</u> rogram, continues to be implemented.
CP	The indicated one-time project was <u>c</u> ompleted <u>p</u> rior to the current reporting period.
C	The indicated one-time project was <u>c</u> ompleted in the current reporting period.
N	<u>N</u> ot implemented; <u>N</u> o activity on this program during the current reporting period.
PA	<u>P</u> rogress was made, but <u>a</u> dditional work is needed to completely implement the program.

For additional information about any individual program, please see the main report.

**Table 1: Summary of Progress on Programs**

<b>Program</b>	<b>Description</b>	<b>Status</b>
<b>1</b>	<b>PRESERVATION</b>	
1.1	Condo Conversions - Protect Low/Moderate	OP
1.2	Mobile Home Parks - Implement Existing Ordinance	OP
1.3	Mobile Home Parks - Preserve Affordability	PA
1.4	Rental Stock Monitoring	PA
1.5	Rehabilitation - Monitoring Program	OM
1.6	Rehabilitation - Rental Loan Assistance	PA
1.7	Rehabilitation/Housing Acquisition	PA
1.8	Rehabilitation - Incentives for Lower-Income	OP
1.9	Rehabilitation - Homeowners' Program	OP
1.10	Neighborhood Improvement Program	PA
<b>2</b>	<b>QUANTITY &amp; DIVERSITY OF STOCK</b>	
2.1	Regional Housing Need	PA
2.2	Flexible Development Standards	OP
2.3	Monitoring Developable Acreage	OM
2.4	Adaptive Re-Use Regulations	PA
2.5	Mixed-Use Regulations	CP
2.6	Coastal Development Monitoring	OM
<b>3</b>	<b>SPECIAL NEEDS/LOWER &amp; MODERATE INCOME</b>	
3.1	Farm Worker Housing	OP
3.2	Large-Family Housing	CP
3.3a	Homeless - Facilitate Site Acquisition	OP
3.3b	Homeless - Funding (CDBG, Other)	OP
3.3c	City Referral Service - CDBG Funding	OP
3.4a	Senior Housing - Amend Zone Code/CUP	C
3.4b	Senior Housing - Low-income Seniors	PA
3.5	Lower-Income Objectives	PA
3.6a	Inclusionary - Lower-Income in Master Plans	CP
3.6b	Inclusionary - Lower-Income in Other Developments	CP
3.6c	Cost of Affordable Housing - In-Lieu Fees	CP
3.7a	Density Bonus Ordinance	CP
3.7b	Alternative Housing Types (SRO, MLU, Farm Worker)	PA

<b>Table 1: Summary of Progress on Programs</b>		
<b>Program</b>	<b>Description</b>	<b>Status</b>
3.7c	City Initiated Development - Low/Very-Low	PA
3.7d	Section 8 Housing	OP
3.7e	Fee Waivers (CC Policy 17)	OP
3.7f	Priority Processing	OP
3.7g	In-Kind Improvements	PA
3.7i	Density Increases Above G.P. Range (SDP)	CP
3.7j	Ordinances to Implement Inclusionary	CP
3.8	Excess Dwelling Unit Bank	PA
3.9	Annual Priorities List For Lower-Income/Special Needs	OM
3.10a	Moderate Income - Mortgage Revenue Bonds	PA
3.10b	Lending Programs	PA
3.10c	Inclusionary - Moderate Income	N
3.11	Smaller Housing/Small Lot Study	CP
3.12	Land Bank	OP
3.13	Community Reinvestment Act - Bank Monitoring	OM
3.14	Housing Trust Fund - Establish One	CP
3.15	Annual Report on Housing Element Progress	OP
<b>4</b>	<b>HOUSING, JOBS, WORK FORCE BALANCE</b>	
4.1	Housing Impact Fee on Non-Residential Development	PA
<b>5</b>	<b>RESOURCE CONSERVATION</b>	
5.1	Energy Conservation	OP
5.2	Water Conservation	OP
<b>6</b>	<b>OPEN AND FAIR HOUSING OPPORTUNITIES</b>	
6.1	Fair Housing Information/Practices	OP
6.2	Referrals for Military/Students	OP

## **GOALS, OBJECTIVES, POLICIES, PROGRAMS [taken verbatim from the Housing Element]**

The Goals, Objectives, Policies and Programs Section of this Element contains the actions the City of Carlsbad will take to promote housing and shelter opportunities for all segments of the community.

This section contains overall *Goal* statements, *Objectives* to meet those Goals, *Policies* on positions the City may take to meet those Goals, and *Programs* which are action statements.

There are six Goals stated in this Element. The Goals are articulated as a general "end condition statement", which state a desired achievement. The Goals do not contain an action verb as they reflect a final statement of what the City will hope to achieve. How the goal will be achieved is established via the subordinate objectives, policies and - importantly - action programs.

Under each Goal there are several **Objectives**. Objectives are more specific achievements the city will strive for to obtain the more broad based Goal. Each Objective should address a particular outstanding housing need that is identified in the previous sections of the Element. Many objectives establish numerical targets to be achieved in action programs.

Each Objective will contain one or more **Programs** that will describe an action necessary to achieve an Objective. The Programs are briefly described and are to be implemented over the five year period of the Element. Many of the programs are studies that will take a comprehensive look at a certain aspects of housing and may follow through with a more specific program should the study indicate a plan of action should be required. Due to complexities of certain subjects it is important to take a close look at the impacts and implications that these programs may bring about.

Under many Objectives, but not all, there are **Policies**. Policies are statements on position the City takes to implement an objective. Policies contained in the Housing Element are important statements as they reflect the City's official position on a matter. Future development must be consistent with these policies.

Following each program are line items:

**FUNDING:** indicates the source of funds to be used for each program. Where a funding source indicates General Fund it is to mean that the program uses existing staff or resources and is funded by the General Fund. Some Funding source indicate the use of State, or Federal funds. Where these funds might become unavailable, implementation of these programs may not be possible.

**LEAD AGENCY:** indicates the agency, department or authority responsible for the program. When more than one agency is listed it is a joint or cooperative effort. The Housing Authority means the City Council authority over any housing program, the administration and actual staffing to be carried out by the Housing and Redevelopment Department.

**TARGET YEAR:** indicates the time span for most of the programs, usually from 1991 until 1996. Where only one date is indicated it means the fiscal year the program is scheduled to be implemented or the study will take place.

**PROGRESS '94 - '95 [Added for the Annual Report]:** indicates the progress which was made in the current reporting period, July 1, 1994 through June 30, 1995. May also give information on the cumulative progress which has been achieved during the current five-year cycle of this housing element (7/91 - 6/96). This text is in the special "box" format that surrounds this paragraph.

**GOAL 1 (PRESERVATION)**

Carlsbad's existing housing stock preserved and rehabilitated with special attention to housing affordable to lower-income households

**OBJECTIVE 1.1 (CONDOMINIUM CONVERSION)**

Create a program to monitor conversions to condominium of those rental apartments which house primarily low and moderate income households and limit those conversions that reduce the supply of affordable housing for those income ranges.

**POLICY 1.1**

*Conversions to condominiums of existing rental units which contain households of low and moderate income may not be approved unless findings can be made that; the units will remain affordable, and the City has met its need for affordable housing stock for lower and moderate income groups.*

**PROGRAM 1.1**

Develop a program to restrict condominium conversion when such conversions would reduce the number of low or moderate income housing units available throughout the city. This program may require apartment owners who are undertaking the conversion to pay a fee to the City. These funds would be used to mitigate the impacts of the loss of these rental units from the City's housing stock to low and moderate income households.

**FUNDING:** Condominium Conversion Fee  
**LEAD AGENCY:** Planning Dept.  
**TARGET YEARS:** 1992

**PROGRESS '94-'95:**

Prior to the current reporting period, on May 21, 1993, the City's Inclusionary Housing Ordinance became effective. Among other things, the ordinance requires that at least 15 percent of the units in any new subdivision must be affordable to lower-income households. Section 21.85.030 of the ordinance specifically states that the fifteen percent requirement applies to "(5) Tentative maps for the conversion of apartments to air-space condominiums." While this provision does not restrict the conversion of apartments to condos, it does assure that a reasonable number of the units will be reserved for lower-income households, in keeping with the city's over-all policy of inclusionary housing.

Condominium conversions are also addressed by the City's revised Density Bonus Ordinance, which also became effective on May 21, 1993. Where a density bonus is sought for a condominium conversion, as is permitted under state law, the City's ordinance stipulates that the conversion "...shall not result in a reduction of affordable housing stock for lower income groups, as of the most recent inventory" (Municipal Code Section: 21.86.090.(d)(5)). As part of the application for density bonuses the applicant must provide a report to the City regarding: the monthly incomes of all tenants, rents being charged, and vacancy information for the prior year.

**OBJECTIVE 1.2 (MOBILE HOME PARKS)**

Reduce or eliminate net loss of existing mobile home rental opportunities available to lower and moderate income households.

**PROGRAM 1.2**

The City will continue to implement the City's existing Residential Mobile Home Park zoning ordinance (Municipal Code 21.17) which sets conditions on changes of use or conversions of Mobile Home Parks.

**FUNDING:** CDBG & Redevelopment Set-aside Funds  
**LEAD AGENCY:** Planning Dept., Housing and Redevelopment Dept.  
**TARGET YEARS:** 1992

**PROGRESS '94-'95:**  
  
The City continues to implement the provisions of Municipal Code Section 21.17. Since this program was adopted no mobile home park has pursued a change of land use or conversion.

**OBJECTIVE 1.3 (MOBILE HOME PARKS)**

Retain and preserve the affordability of mobile home parks.

**PROGRAM 1.3**

The City will assist lower income tenants to research the financial feasibility of purchasing their mobile home park so as to retain rents and leases affordable to its tenants.

**FUNDING:** CDBG funds, State Grants and Loans, Private loans.  
**LEAD AGENCY:** Housing and Redevelopment Dept.  
**TARGET YEARS:** 1992

**PROGRESS '94-'95:**  
  
In June 1994, City Council adopted a mandatory mobile home park rent control ordinance. The key provision established park rents based upon fair market rents. However, between the adoption date and the effective date of the ordinance, a petition referendum was assembled by opponents of the ordinance. In response to this referendum drive, City Council deferred the effective date of the ordinance and, instead, placed it as a ballot measure (Proposition F) for the November 1994 election. Carlsbad voters voted in favor of Proposition F, which called for the repeal of the City's mobilehome rent control ordinance.  
  
The City has continued to work with mobilehome residents. In 1994-95, the City was able to assist residents of the Lanakai Lane Mobilehome Park to reach a long term rent accord with the property owners. This rent accord will help to stabilize rents and rent increases keeping in pace with fair market rents. The City is working with the residents of the Rancho Carlsbad Mobilehome Park, who are trying to purchase their park.  
  
Also, the City's Section 8 Rental Assistance Program provides a local priority for very low income households residing in mobilehomes; this makes a rental subsidy available.

**OBJECTIVE 1.4 (RENTAL STOCK MONITORING)**

Maintain a data base of information on vacancy rates, rental rates and physical condition of the city's existing rental housing stock, and utilize this database to evaluate programs affecting rental stock.

**PROGRAM 1.4**

The City shall develop and implement a program in which it will periodically collect information on the factors affecting supply and demand of existing rental stock within the city. This information will be used in analysis of rental housing to be contained in the annual Housing Element Report.

**FUNDING:** Existing City staff (General)  
**LEAD AGENCY:** Planning Department, Housing and Redevelopment Dept.  
**TARGET YEARS:** 1991

**PROGRESS '94-'95:**

The City has designed a computerized database called RENTALS, for maintaining data on all rental units in the City, including rented single-family homes and condominiums. The database will keep information on the physical characteristics of the units, rents, and vacancy data for multiple years. This information will be used by the Section 8 and other City housing programs, and may eventually be made available to parties outside the City on an ad hoc basis. Prior to the current reporting period individual base records were created containing addresses and physical characteristics for some 6,000 potential rental site addresses. During 1994-1995 staff continued work on the base records and initiated a rent/vacancy survey (involving voluntary participation) needed to complete the base records. A mail-out survey was conducted in September and October 1994. However, only about 20% of the property owners responded. Staff spent much of the balance of the year inputting the survey data into RENTALS and trying to find alternative sources of information for the properties whose owners chose not to participate in the survey. This work was still continuing at the end of the reporting period. Once the data are all obtained and entered into the database, staff plans to prepare a set of standard reports for the use of a variety of parties. An electronic tie to the City's automated building permit system has yet to be developed to enable the automatic addition of new records to RENTALS as construction occurs.

**OBJECTIVE 1.5 (REHABILITATION)**

Identify and rehabilitate substandard and deteriorating housing.

**PROGRAM 1.5**

The Building Department will develop and implement a program to monitor and report to the Housing and Redevelopment Dept., information on housing stock that is substandard and or deteriorating. Identified structures will be reported to the Housing and Redevelopment Dept. for assistance under the City's rehabilitation and assistance programs.

**FUNDING:** CDBG funds, State and Federal Rehab. Loans, Private rehabilitation loans.  
**LEAD AGENCY:** Building Dept., Housing and Redevelopment Agency.  
**TARGET YEARS:** 1991-1996

**Progress '94-'95:**

On a complaint basis, the Building Department identifies residential structures which may be considered substandard or deteriorating housing through notification from the public of those residential structures presenting a health or safety hazard and/or inspection of properties.

## OBJECTIVE 1.6 (REHABILITATION SUBSIDIES-RENTAL STOCK)

Provide loan subsidies, loan rebates and other assistance to owners of lower income units in need of repair and rehabilitation. *Target: approximately 10 units per year*

### PROGRAM 1.6

The City through the Housing and Redevelopment Department and in conjunction with the Building Department will provide loans, rebates and other support to preserve the existing stock of low and moderate income rental housing. Priority will be given to housing identified by the Building Department as being substandard or deteriorating in which houses families of lower income and in some cases moderate income. This program depends partially on outside funding from State, and Federal sources.

**FUNDING:** State grants and loans. Private lending institutions, Redevelopment set-aside funds, CDBG funds.

**LEAD AGENCY:** Housing and Redevelopment Dept., Building Dept.

**TARGET YEARS:** 1991-1995

#### PROGRESS '94-'95:

In June 1994, City Council approved an amendment to the City's existing Residential Rehabilitation Program agreement with the Housing Authority of the County of San Diego to also include administration of a rental rehabilitation program on behalf of the City of Carlsbad. The City is developing the necessary administrative policies and procedures for the implementation of the rental rehabilitation assistance program, including establishing criteria for evaluating financial assistance.

As funds become available, the City will provide, in accordance to the policies and procedures to be established, rehabilitation assistance to owners of residential rental properties to maintain or improve their properties. The City will apply for state and/or federal funds to implement this program on a project-specific basis.

Those rental properties identified under the City's program to report and monitor substandard or deteriorating residential properties will be provided with information regarding residential rehabilitation assistance programs available and will be encouraged to participate in such programs. As feasible, assistance will be provided to rehabilitate rental properties.

## OBJECTIVE 1.7 (ACQUISITION AND REHABILITATION)

Acquire deteriorating and substandard rental housing from private owners, utilizing various local, state, and federal funding sources. *Target: Approximately 50 units through 1996.*

### POLICY 1.7

*Of the rental units acquired by the city for rehabilitation purposes by the City's Housing Authority, approximately 20% will be set aside for households in the very low-income range.*

### PROGRAM 1.7

The City through the Housing and Redevelopment Dept. will implement a program to acquire, using local Redevelopment set-aside funds, CDBG, State, Federal and private sector loans, rental housing that is substandard, deteriorating or in danger of being demolished. Twenty percent of the units, once rehabilitated, will be set aside for very-low income households.

**FUNDING:** Redevelopment set-aside, CDBG funds, State and Federal loan programs, private sector loan programs.  
**LEAD AGENCY:** Housing and Redevelopment Dept.  
**TARGET YEARS:** 1991-1996

**PROGRESS '94-'95:**

The City has determined that the most effective use of its resources is to leverage these resources with those of not-for-profit and other private residential developers for the acquisition and/or rehabilitation of affordable housing.

The City continues to encourage and consult with not-for-profit and other private organizations to acquire existing housing that is substandard, deteriorating, or in danger of being removed as potentially affordable housing for the purpose of rehabilitating and offering such housing as affordable to lower income households. To encourage the acquisition and rehabilitation of housing by not-for-profit and other private organizations, the City will provide some incentives, such as financial assistance.

In 1994-95, the City met with property owners of one rental housing project in the Northwest Quadrant to evaluate the feasibility of rehabilitating the property for use as affordable housing for lower income households. The City will continue to evaluate residential properties for the feasibility of acquiring and rehabilitating such properties and will continue to encourage participation by private organizations in these activities.

**OBJECTIVE 1.8 (REHABILITATION INCENTIVES)**

Provide incentives for the rehabilitation and preservation of deteriorating rental units which house lower income residents.

**PROGRAM 1.8**

The City will provide financial and processing incentives for the owners of lower income rental stock in need of rehabilitation and preservation. These incentives will include, but not limited to: the waiving or reduction of planning and building fees, priority processing and financial incentives such as low-interest rehabilitation and property acquisition loans.

**FUNDING:** Redevelopment set-aside. CDBG Funds.  
**LEAD AGENCY:** Housing and Redevelopment Dept.  
**TARGET YEARS:** 1991-1996

**PROGRESS '94-'95:**

This program will be implemented in conjunction with Housing Element Program 1.6 above. In addition to financial incentives to encourage owners of residential rental properties to rehabilitate their properties, the City intends to also offer other incentives, such as waiving or reducing planning or building fees and providing priority processing.

The City has some resources and will seek others for rental rehabilitation projects and will continue to work with for-profit and non-profit organizations on identified opportunities. Those rental properties identified under the City's program to report and monitor substandard or deteriorating residential properties will be provided with information regarding any residential rehabilitation assistance programs available and will be encouraged to participate in such programs.

**OBJECTIVE 1.9 (REHABILITATION-HOMEOWNERS)**

Provide rehabilitation assistance, loan subsidies and loan rebates for lower-income households, persons of special needs, and senior homeowners to preserve and rehabilitate deteriorating homes. *Target:* Approximately 5 units per year.

**POLICY 1.9**

*The Housing Authority provision of rehabilitation assistance and assistance to homeowners will be targeted to low-income, special needs and senior households in that priority.*

**PROGRAM 1.9**

The City will implement a homeowner rehabilitation program targeted to lower-income, special needs (handicapped, low income large-family, etc.,) and senior households that will consist of financial and processing incentives such as low interest and deferred repayment loans, loan rebates, and priority processing.

**FUNDING:** Redevelopment set-aside, CDBG, State, Federal and private sector loans and grants.  
**LEAD AGENCY:** Housing and Redevelopment Dept.  
**TARGET YEARS:** 1991-1996

**PROGRESS '94-'95:**

The County of San Diego administers a Single Family Residential Rehabilitation Program on behalf of the City of Carlsbad. The City offers below market rate interest loans, no interest deferred loans, a weatherization grant, and a grant for elderly or disabled persons to rehabilitate eligible owner occupied single family homes. Participation is limited to low-income homeowners.

In 1994-95, the City provided residential rehabilitation assistance to one mobile home and two single family homes. One single family home is currently being reviewed for environmental clearance and is in the funding process. As of May 1995, there are 18 households on the interest list.

For 1995-96, an additional \$86,136 in 1994-95 CDBG funds has been allocated for the Single Family Residential Rehabilitation Program and will be available once an amendment to the Agreement with the County of San Diego is executed. It is estimated that the 1995-96 Residential Rehabilitation funds will be able to assist three to four home owners.

**OBJECTIVE 1.10 (NEIGHBORHOOD IMPROVEMENT)**

Assist in the creation of a Neighborhood Improvement Program to provide local resident input and participation into neighborhood preservation and improvement programs.

**PROGRAM 1.10**

Assist residents, especially in older neighborhood, in the creation of a Neighborhood Improvement Program under which the city staff would: 1) promote an organization directed at fostering neighborhood pride and improvement, and 2) provide information on city and other funding resources. Activities might include housing rehabilitation and repair, infrastructure maintenance and repair, weed abatement, abatement of code violations, neighborhood pride and awareness activities, charitable activities and information outreach, among others.

**FUNDING:** CDBG funds, Redevelopment Set aside funds.  
**LEAD AGENCY:** Housing and Redevelopment Dept.  
**TARGET YEARS:** 1992-1996

**PROGRESS '94-'95:**

The City has initiated the process of developing a Specific Plan for the oldest and most heavily concentrated minority and low income neighborhood in Carlsbad, the "Barrio" area. The City is preparing a land use plan and design guidelines for the Barrio, with participation from area residents. It is expected that the Draft Specific Plan for the Barrio will be available for public review and comment by September 1995.

In 1994-95, as part of a neighborhood improvement program for the Barrio area, City Council approved the use of Redevelopment Tax Increment funds for the beautification of a portion of Roosevelt Street between Carlsbad Village Drive and Oak Avenue. Beautification activities may include landscaping, sidewalk and street improvements, and street furniture. It is anticipated that work will not begin until 1996.

For 1995-96, the City will continue to evaluate the need and feasibility to develop other neighborhood improvement programs or activities, such as housing rehabilitation and repair, infrastructure maintenance and repair, weed abatement, and abatement of code violations. In addition, the City will continue its efforts to reach out to the Barrio, to foster greater awareness of the needs and concerns of this area, and to encourage neighborhood pride and improvement.

**GOAL 2 (QUANTITY AND DIVERSITY OF HOUSING STOCK)**

New housing developed with a diversity of types, prices, tenures, densities and locations and in sufficient quantity to meet the demand of anticipated City and regional growth.

**OBJECTIVE 2.1 (REGIONAL HOUSING NEED)**

Allow development of sufficient new housing to meet Carlsbad's share of the total regional housing need, as identified in SANDAG's *Regional Housing Needs Statement, 1991-1996*. **Target:** Approximately 6273 units.

**PROGRAM 2.1**

With the exception of some lower-income and special needs housing which may be assisted by the City, new housing development will be achieved through private sector efforts. New development will be achieved through the auspices of State Planning Law and the City's General Plan and Municipal Code. There is no special program for this overall goal. It is recognized that achievement of this goal will be heavily influenced by private sector marketing strategies; local, state and national economic trends; availability of regional infrastructure and services; and other factors beyond the control of Carlsbad.

**PROGRESS '94-'95**

Progress for the current period and cumulative progress to-date for the five-year Housing Element cycle are shown in the following table.

REGIONAL SHARE: DISTRIBUTION OF NEWLY CONSTRUCTED HOUSING BY INCOME GROUP			
Income Group to which units are affordable	Reporting Period		
	Current (7/1/94 - 6/30/95)	Cumulative (7/93 - 6/95)	Cumulative (7/91 - 6/95)
Very Low	0	0	unknown
Low	2	2	unknown
Moderate	2	2	unknown
Other	291	424	unknown
<u>Total</u>	<u>295</u>	<u>429</u>	<u>973</u>

In the 7/94 - 6/95 reporting period 295 new homes finished construction in Carlsbad. Of these, 235 were either for-sale or custom homes. Fifty eight condominiums were built, as were two "second units" (tabulated with the single family units in the above table). No rental apartments were built. The data in the above table provide a summary of the sales prices of individual units which were collected from public records and field visits conducted during July and August 1995. Rent information for the two "second units" was unavailable, and it was understood that one of the two units was being used for a family member. Because of the nature of second units, it is assumed that they are all affordable to low-income families. The median price for a condominium was \$229,900, with the mean number of bedrooms = 3.17. The median price for a single-family home was \$312,900, with the mean number of bedrooms 3.84.

Sales price and rent data are unavailable for the period prior to 7/93. Because of the prevailing tax laws, market conditions, and local costs of development during this period, it may be assumed, for the cumulative period 1991 - 1993, that a) few rental units were built, and b) few, if any, of the new units constructed during this period were affordable to economic groups below "other".

Appendix 1 to this report is a listing of the address, number of bedrooms, price and affordability of each new unit in the City during the reporting period, together with a table setting out the qualifying prices for each of the income groups (adjusted for household size). Standards for affordable housing prices were defined collectively and adopted by the jurisdictions of the San Diego Association of Governments in 1993. Revised HUD estimates of median San Diego County income were used in the formulas to update prices and rents for FY '94 - '95.

In 1993 the City enacted a mandatory inclusionary housing ordinance and, subsequently, several projects have been approved subject to these regulations. FY 1994-1995 saw several hundred of these units begin construction, although none were completed before the end of the reporting period. Appendix 2 provides information on development proposals approved or pending before the City which are/will be subject to the City's inclusionary housing program.

## OBJECTIVE 2.2 (DEVELOPMENT STANDARDS)

Ensure that development and housing construction achieved through the use of modified codes and standards, that will reduce the cost of housing, will retain quality design and architecture.

### PROGRAM 2.2

The Planning Department, in its review of development for all income categories, may recommend waiving or modifying certain development standards or recommending that certain Municipal Code changes be implemented to encourage the development of low and moderate income housing. These recommendations will be reviewed with a goal to reduce costs associated with overly strict or outdated standards. These cost savings need to be *guaranteed* to be passed on to the future cost of the unit. Although standards may be modified they will also retain aesthetic and design criteria acceptable to the City.

**FUNDING:** CDBG Funds, Redevelopment Set-aside funds, General funds for administrative purposes only.

**LEAD AGENCY:** Planning Dept., Engineering Dept., Building Dept.

**TARGET YEARS:** 1991-1996

#### PROGRESS '94-'95:

Prior to the current reporting period, in July of 1992, the City adopted Ordinance NS-207. This ordinance modified the City's existing Site Development Plan permit process (required for all multi-family projects) to authorize the City to exercise flexibility in reviewing special project designs for affordable housing on a case-by-case basis. Essentially, the change enables the City to deviate from its normally required development standards when such deviations are critical to the feasibility of a residential project which includes the mandatory lower-income-affordable units. Often the design flexibility is needed to accommodate increases in density which are sometimes granted to affordable housing projects.

This ordinance has proven to be an important tool in implementation of the City's inclusionary housing ordinance. It has been used in numerous projects reviewed during the reporting period.

## OBJECTIVE 2.3 (DEVELOPABLE ACREAGE MONITORING)

Ensure sufficient developable acreage in all residential densities to provide varied housing types for households in all economic ranges.

### PROGRAM 2.3

The City will monitor the absorption of residential acreage in all densities and, if needed, recommend and encourage 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.

**FUNDING:** Existing City Staff (General)

**LEAD AGENCY:** Planning Dept.

**TARGET YEARS:** 1991-1996

#### PROGRESS '94-'95:

The City continues the development-monitoring program instituted in 1986 with adoption of its Growth Management Program. Monthly status reports and an annual cumulative report

are produced by the Growth Management Section. These reports summarize land absorption, development activity, and capital improvement pacing.

This program was initially proposed with the 1991 draft of the Housing Element. It was intended to assure that sufficient higher density land would be available for affordable housing. It is less important now in light of other changes which were made with the final Housing Element (adopted in November 1991) and follow-up amendments to the Land Use Element in April 1993. These changes authorize the City, in most of its undeveloped areas, to grant density increases to lower-income housing projects over and above what is normally allowed by the density designations of the Land Use Element. The result is to increase the effective densities of most of the remaining vacant land of the City to whatever densities are needed to support affordable housing projects. (Although density designations still exist for "market-rate" housing) Therefore, the need to monitor remaining higher-density-designated land is less critical.

The changes in the general plan, while enabling higher densities for affordable housing, also assure that the over-all number of units developed in the City will continue to conform to the build-out limits established by the City's Growth Management Program.

#### **OBJECTIVE 2.4 (ADAPTIVE REUSE)**

Provide alternative housing environments by encouraging adaptive reuse of older commercial or industrial buildings.

##### **PROGRAM 2.4**

The City should encourage adaptive reuse of aging industrial, commercial and some residential buildings by developing an ordinance that would create affordable living spaces for combined living/working spaces. The principle targeted area for this type of housing would be in the downtown redevelopment area.

**FUNDING:** Redevelopment Set aside, CDBG funds.  
**LEAD AGENCY:** Planning Dept., Housing and Redevelopment Dept.  
**TARGET YEARS:** 1992

##### **PROGRESS '94-'95:**

This program is directed primarily to the older parts of town, and in particular, the Village Redevelopment Area. A revised Redevelopment Area Master Plan has been developed by a citizens' committee and consultant and has been available for public review and comment. In August and September 1995, the City's Design Review Board and Planning Commission will consider a recommendation to City Council to adopt the revised Plan.

The draft document discusses location and development criteria for artists "live/work studios", one incarnation of adaptive reuse of commercial buildings. An ordinance will probably not be needed to implement the principles of adaptive re-use, because existing codes and standards can accommodate it. No ordinance is planned at this time.

#### **OBJECTIVE 2.5 (MIXED USE)**

Encourage increased integration of housing with non-residential development.

## PROGRAM 2.5

Review existing zoning and land use policies to remove impediments to mixed use development. Major commercial centers should incorporate, where appropriate, mixed commercial/residential uses. Major industrial/office centers, where not precluded by environmental and safety considerations, should incorporate mixed industrial/office/residential uses.

**FUNDING:** Existing City staff (General)

**LEAD AGENCY:** Planning Dept.

**TARGET YEARS:** 1993

### PROGRESS '94-'95:

During 1994, the Planning Department critically examined its existing codes in greater detail and concluded that its C-1 and C-2 (commercial) zones already allow the mixing of commercial land uses with residential uses, and the PM (industrial) zone allows consideration of residential projects by conditional use permit; while assuring health and safety concerns. No special Municipal Code changes are needed to enable mixed use developments.

## OBJECTIVE 2.6 (COASTAL DEVELOPMENT MONITORING)

Identify, monitor, and report the number of affordable housing units constructed, converted, or demolished in the coastal zone.

### POLICY 2.6

*Pursuant to Government Code Section 65588 and 65590 from January 1, 1992, the City shall monitor, record, and report data on housing units constructed, converted, and demolished in the Coastal Zone together with information regarding whether these units are affordable to lower-income households.*

### PROGRAM 2.6

As a function of the building process, the City will monitor and record Coastal Zone housing data including, but not limited to, the following:

- 1) The number of new housing units approved for construction 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 or within three miles of the coastal zone.
- 3) The number of existing residential dwelling units occupied by persons and families of low or moderate income that have been authorized to be demolished or converted since January 1, 1982 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 have been required for replacement or authorized to be converted or demolished as identified in paragraph 3). The location of the replacement units, either onsite, elsewhere within the locality's jurisdiction within the coastal zone, or within three miles of the coastal zone within the locality's jurisdiction, shall be designated in the review.

These data will be reported in the City's annual housing report.

**FUNDING:** General funds - (Administrative only)  
**LEAD AGENCY:** Building Department  
**TARGET YEARS:** 1/92 - Begin capturing data  
 1992-1996 - Ongoing.

**PROGRESS '94-'95**

Prior periods: In the period 7/1/91 - 6/30/93 a total of 127 new residential units were built within the Coastal Zone. Of these, no units were required by the City to be affordable to low or moderate income households. The City is unable to provide actual permit data on demolitions and conversions during this period, but we believe that no units requiring replacement were lost.

Current period: During the reporting period 7/1/94 - 6/30/95, a total of 172 new residential units were built within the Coastal Zone. Although the City's inclusionary housing ordinance was effective throughout this period, some of these units were "grandfathered" in under preexisting subdivision approvals and were instead required to pay a "housing impact fee" (in the amount of \$2,925 per unit) to the City's Housing Trust Fund. The balance of the units were subject to the inclusionary housing ordinance. One unit was a "second unit", a type of construction which is automatically assumed to be affordable to low income households. There was one demolition in the Coastal Zone, a single-family residence. It is not known if the occupant prior to demolition was low or moderate income. Pursuant to Government Code Section 65590(b), the City would not be required to replace this unit, in any case. Please see the following table for tabulated statistics.

COASTAL ZONE RESIDENTIAL DEVELOPMENT			
Type of Development	Current Period 7/94 - 6/95	Cumulative 7/93 - 6/95	Cumulative 7/91 - 6/95
New Construction Completions:			
Total new construction	172	217	344
Low Income	1	1	?
Moderate Income	0	0	?
Demolitions/conversions (units lost)	1	1	?
Low/Mod. Replacements	0	0	0

**GOAL 3 (GROUPS WITH SPECIAL NEEDS, INCLUDING LOW AND MODERATE INCOME HOUSEHOLDS)**

Sufficient new, affordable housing opportunities in all quadrants of the City to meet the needs of groups, with special requirements, and, in particular the needs of current lower and moderate income households and a fair share proportion of future lower and moderate income households.

**OBJECTIVE 3.1 (FARM WORKER)**

Provide adequate shelter for both the permanent and migrant farm worker.

### PROGRAM 3.1

The City shall work with and assist local community groups, social welfare agencies, farmland owners, and other interested parties to provide shelter for the identified permanent and migrant farm workers during the five-year housing element period. These efforts will be in coordination with other regional and local programs.

**FUNDING:** State and Federal grants and loans. CDBG funds  
**LEAD AGENCY:** Community Development Department.  
**TARGET YEARS:** By first Quarter of 1992 - Meet with local farmers and advocates to refine the needs assessment of permanent and migrant farm workers, and aggressively pursue grant and siting possibilities. Continue efforts through 1996.

#### PROGRESS '94-'95:

The City has had initial discussions with a non-profit organization that is interested in constructing housing for farm workers. To date, an appropriate site has not yet been identified for the housing

Through awards of Community Development Block Grant funds the City also continues to support the work of Catholic Charities of San Diego and the operation of its La Posada Guadalupe de Carlsbad emergency/temporary shelter for 50 homeless workers. The City's conditional use permit for this temporary facility was extended for an additional two years (Approved September 1994).

### OBJECTIVE 3.2 (LARGE FAMILY)

Assure the development of an adequate number of housing units suitably sized to meet the needs of lower-income larger households

#### POLICY 3.2

*In those developments which are required to include 10 or more units affordable to lower-income households, at least 10 percent of the lower income units should have 3 or more bedrooms. This policy does not pertain to lower-income senior housing projects.*

### PROGRAM 3.2

Those housing projects entering into an agreement with the City to provide lower income housing shall be required to implement Policy 3.2

**FUNDING:** General Fund (administration only)  
**LEAD AGENCY:** Planning Dept.  
**TARGET YEARS:** 1991-1996

#### PROGRESS '94-'95:

With the adoption of the City's Inclusionary Housing Ordinance in May of 1993, Policy 3.2 was codified: For projects required to provide at least ten units of inclusionary housing affordable to lower-income households, at least ten percent of these units must include three or more bedrooms.

### OBJECTIVE 3.3 (HOMELESS)

Provide transitional shelters and assistance for the homeless.

#### PROGRAM 3.3.a

Carlsbad will continue to facilitate the acquisition, for lease or sale, of suitable sites for transitional shelters for the homeless population. The City will also continue to assist local non-profits and charitable organizations in securing state funding for the acquisition, construction and management of these shelters.

**FUNDING:** Redevelopment Set aside funds, CDBG funds  
**LEAD AGENCY:** Community Development Agency  
**TARGET YEARS:** 1991-1996

#### PROGRESS '94-'95:

Acknowledging that the homeless are not residents of any community in particular, Carlsbad, along with the North County Coastal communities of Vista, Oceanside, Encinitas, and the County of San Diego, are considering adopting resolutions which will declare the City's intention to participate in a regional approach to meeting the needs of the North County Coastal homeless population. In 1995 - 1996, Carlsbad will be evaluating the possibility of participating with other North County Coastal jurisdictions to provide shelter and other assistance to the homeless in this region. However, there was no new activity on this program during the reporting period.

Through awards of CDBG funds the City, however, continues to support the work of Catholic Charities of San Diego and the operation of its La Posada Guadalupe de Carlsbad emergency shelter for 50 homeless workers. The City's conditional use permit for this temporary facility was extended for an additional two years (Approved September 1994). The City also provided CDBG funds to several non-profit organizations who shelter and other assistance to homeless person of Carlsbad.

In addition to providing CDBG funds for homeless shelters and services, homeless persons applying for the City's Section 8 Rental Assistance Program are given a federal preference and local priorities for being homeless and also if they are working with a social service provider.

The City also provided CDBG funds to several non-profit organization who can provide shelter and other assistance to homeless persons of Carlsbad.

#### PROGRAM 3.3.b

Continue to provide Federal Community Development Block Grant (CDBG) funds to community, social welfare, not-for-profit and religious groups which provide services within the North County area.

**FUNDING:** CDBG funds  
**LEAD AGENCY:** Housing And Redevelopment Dept.  
**TARGET YEARS:** 1991-1996

#### PROGRESS '94-'95:

The City received \$558,000 in Federal CDBG funds for 1994-95. Of the CDBG funds available to fund activities during 1994-95, \$57,500 was awarded to five private organizations which provided shelter or other services to homeless persons, including women

and children dealing with substance abuse problems.

The five organizations and the amounts awarded are as follows:

1994 - 1995 CDBG FUND ALLOCATIONS FOR SHELTER SERVICES		
Project Name/Organization	Project Description	Amount of Funding
La Posada de Guadalupe/ Catholic Charities	50 bed shelter, located in Carlsbad, for homeless men. Maximum stay is 90 days.	\$10,000
Good Samaritan House/ Catholic Charities	Shelter, located in Oceanside, for homeless men. Maximum stay is 90 days.	\$7,500
Homeless Prevention Program/ Community Resource Center	Assist low and moderate income persons in maintaining adequate housing through the provision of social services and the provision of direct emergency assistance, such as food and clothing.	\$10,000
Day Shelter/ Brother Benno Foundation	Provide services and assistance to homeless individuals, such as food, clothing, personal hygiene, and mailing address.	\$5,000
Family Recovery Project/ EYE Counseling and Crisis Services	Provides transitional housing and treatment for pregnant and parenting women dealing with substance abuse problems.	\$25,000
<b>TOTAL</b>		<b>\$57,500</b>

**PROGRAM 3.3.c**

Encourage and assist a subrecipient (non-profit organization) of CDBG funds to develop a program which will offer a City Referral Service to refer, on a 24-hour basis, transient homeless individuals and families to local agencies providing services to the homeless.

**FUNDING:** CDBG Funds  
**LEAD AGENCY:** Housing and Redevelopment Dept.  
**TARGET YEARS:** 1991-1996

**PROGRESS '94-'95:**

In 1990-91, CDBG funds were awarded for a City Referral Service to refer, on a 24 hour basis, homeless individuals and families to appropriate social service agencies and shelters. In 1991-92, these funds were reallocated to other eligible CDBG projects because it had been determined that there were already existing referral services which were adequate to meet this need for information and referral.

An information telephone line for North County San Diego and a pamphlet regarding this information line is sponsored by the County of San Diego and the United Way of San Diego.

This telephone line provides free comprehensive information and referrals for problems with shelter, domestic violence, substance abuse, food stamps, veteran benefits, disabled services, etc. The pamphlet also lists the organizations and their telephone numbers which provide food, clothing, shelter, 24 hour help and other information. Locally, the Community Solutions Taskforce of Carlsbad provides a pocket size resource directory listing organizations that provide food, clothing, shelter, transportation, jobs/education, youth/senior activities, counseling and other information. These resource directories are distributed to various businesses, government facilities, churches, and social service agencies in Carlsbad.

Additionally, the Community Resource Center continues to offer information and referral services, as well as emergency assistance, to persons who are homeless or who are suffering from difficult economic situations, which may result in homelessness.

**OBJECTIVE 3.4 (SENIOR/ELDERLY)**

Provide additional senior housing. *Target: Approximately 200 units*

**PROGRAM 3.4.a**

Amend the City's current Senior Citizen's housing regulations to conform to the provisions of Government Code section 65913.4 and 65915 (density bonus). Establish standards for location, parking, safety, recreation facilities, medical care, and other aspects of senior orientated housing. Consider requiring all senior citizen projects to be approved under Conditional Use Permit. Establish appropriate monitoring and reporting procedures to assure compliance with approved project conditions.

**FUNDING:** Existing Staff (General fund)  
**LEAD AGENCY:** Planning Department.  
**TARGET YEARS:** 1991

**PROGRESS '94-'95:**

This program was implemented prior to the current reporting period.

Amendments to the Municipal Code sections on senior housing were adopted by City Council on April 19, 1994. The amendments: a) brought the City's code into compliance with state law with regard to age restrictions, density bonus requirements, and building codes; b) established special senior-oriented criteria for project location, project design (recreation, dining facilities, health services, etc), and amenities for individual units; c) eliminated the requirement for a conditional use permit, substituting instead a requirement for a site development plan and d) established a requirement for operators of new senior projects to provide an annual report to the City providing evidence that project residents conform to the adopted age standards.

Since the new ordinance went into effect in 1994 no new senior projects have been built, and, therefore, no annual age-monitoring reports have been required. The following table lists the senior projects in the City which were authorized by Conditional Use Permit prior to the new ordinance's adoption.

SENIOR HOUSING PROJECTS (PRE-1994 ORDINANCE REVISIONS)				
Project Name	Location	CUP/SUP	Units	Monitoring Required By The Permit
Tyler Street Apts.	3363 Tyler	CUP 217	75	Annual review by Planning
O'Gara Apartments	987 Chinquapin	CUP 220	37	Annual review by Planning
Villas de Carlsbad	1088 Laguna Dr.	CUP 255 CUP 255A	91 34	Annual review by Planning
Ayers Senior Center	El Camino Real/ Alga Rd.	CUP 88-21(A) Extens. pending	173	(Not yet built)
Jefferson House I	3090 Jefferson St.	RP/CUP 82-3	48	None
Jefferson House II	2848 Jefferson St.	RP/86-3	57	None
St. Francis Court	670 Laguna Dr.	CUP 90-15	84	Annual review by Planning

#### PROGRAM 3.4.b

Under the Constitution of the State of California, Article 34, housing projects that have more than 50 percent of the total units set aside for low-income households, and are developed by, or utilize funding from, Federal, State or local sources are subject to a vote by the citizens. In 1980, Carlsbad voters approved an Article 34 referendum to allow 200 units of Senior low-income housing. This authority has not been exercised. The City will study the feasibility of creating a low-income senior housing project at an appropriate site(s) within Carlsbad.

**FUNDING:** Redevelopment set-aside funds, Private financing, state public financing.  
**LEAD AGENCY:** Housing and Redevelopment Dept., Planning Dept.  
**TARGET YEARS:** 1991-1996

#### PROGRESS '94-'95:

Competing priorities for the City's limited housing funds resulted in no progress on this program during the reporting period in terms of City development of a senior project. However, the City continues to work closely with a private, for-profit developer/builder who wants to build a 76 unit senior rental project within Carlsbad.

#### OBJECTIVE 3.5 (LOWER INCOME)

Provide a range of new housing opportunities for lower-income households, in all areas of the city.  
**Target:** Approximately 1400 (1,125 minimum) additional assisted households.

Through the implementation of various programs, the City will ensure the creation of the minimum fair share goal of 1125 lower income housing opportunities. These programs and their associated numerical goals are indicated below.

**FUNDING:** General fund and various other funding sources.  
**LEAD AGENCY:** Planning Department, Housing and Redevelopment Dept.  
**TARGET YEARS:** 1991-1996

See the individual programs which follow for progress made during the current reporting period.

**OBJECTIVE 3.6 (INCLUSIONARY)**

Ensure that all master planned and specific planned communities and all qualified subdivisions provide a range of housing for all economic income ranges.

**POLICY 3.6.a**

*A minimum of fifteen percent of all units approved for any master plan community or residential specific plan shall be affordable to lower income-households.*

**PROGRAM 3.6.a**

The City shall prepare and adopt an Inclusionary Housing Program which shall require that 15% of all base residential units within any Master Plan/Specific Plan community or other qualified subdivision shall be restricted and affordable to lower income households. This program shall require an agreement between all residential developers subject to this inclusionary requirement and the City which stipulates: 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 tenure of affordability for the units.

**FUNDING:** Existing staff (General Fund).  
**LEAD AGENCY:** Planning Department.  
**TARGET YEAR:** Summer of 1992.

**PROGRESS '94-'95:**

This program was implemented prior to the current reporting period.

On May 21, 1993 the City's Inclusionary Housing Ordinance became effective. The ordinance implements programs 3.6a and 3.6b (below), by requiring that 15 percent of the housing produced in all master plans, specific plans, and subdivisions shall be reserved for and affordable to lower-income households.

During the reporting period, the City continued to work with the developers of land subject to master plans and specific plans to develop the land use and financing strategies necessary to bring their existing and new master plans into conformance with the requirements of the ordinance.

**POLICY 3.6.b**

*A minimum of fifteen percent of all approved units in any residential specific plan or qualified subdivision (to be defined) shall be set aside and be made affordable to lower income households. Where it can be demonstrated to the City's satisfaction that it is economically infeasible to build the required units, an in-lieu contribution consisting of funds, land, or other contributions may be made to the City. The City shall assume a fiduciary responsibility for these contributions and assure their ultimate and exclusive use, in providing shelter for lower income households. The in-lieu contribution shall be in an amount to be determined from a*

*study which shall evaluate the cost differential in developing and constructing market-rate vs. lower-income affordable housing.*

**PROGRAM 3.6.b**

Develop a program to implement Policy 3.6.b within all residential specific plan and qualified subdivisions. This program will require an agreement between the developer and the City that stipulates these units will remain affordable for a specific length of time, and that the units may be offered for rent, or with the approval of the city, for sale. The program will also identify incentives the city may offer. An in-lieu fee, to be determined, may act to meet the requirement to construct the low-income housing for developments less than 5 units. **Target:** Approximately 200 units

**FUNDING:** Private developer funding  
**LEAD AGENCY:** Planning Dept.  
**TARGET YEARS:** 1991-1996

**PROGRESS '94-'95:**

This program was implemented prior to the current reporting period.

On May 21, 1993 the City's Inclusionary Housing Ordinance became effective. The ordinance implements programs 3.6b and 3.6a (above), by requiring that 15 percent of the housing produced in all master plans, specific plans, and subdivisions shall be reserved for and affordable to lower-income households.

During the reporting period, the City approved several subdivisions which are subject to the new requirements. Also, during the reporting period construction on several hundred units was started, however none were completed before the end of the period. Please see Appendix 2 to this report for a list of projects (approved and pending).

**PROGRAM 3.6.c (IN-LIEU FEE)**

The City will conduct a study pursuant to Policy 3.6.b to evaluate, as an alternative to inclusionary requirements as stipulated in Policy 3.6.b of the feasibility for an in-lieu contribution for the inclusionary requirement. The fee may be assessed against the market rate units for the development and will be based on the difference in cost to produce a market rate rental unit versus a lower-income affordable unit. A detailed plan for the priority use of these in-lieu fees shall be included in the In-Lieu Fee Study.

**FUNDING:** General Fund (Administration Only)  
**LEAD AGENCY:** Planning Department  
**TARGET YEARS:** Begin study in 1991 - Adopt ordinance by July 1992.

**PROGRESS '94-'95:**

This program was implemented prior to the current reporting period.

On May 21, 1993 the City's Inclusionary Housing Ordinance became effective. The ordinance implements program 3.6a and 3.6b (above), by requiring that 15 percent of the housing produced in all master plans, specific plans, and subdivisions shall be reserved for and affordable to lower-income households. It also implements Program 3.6. c. For subdivisions constructing fewer than seven units, an in-lieu fee (\$11,485 per unit, since October 1993) is an option to developers not able to produce affordable units within their subdivisions. The

ordinance also requires that housing built on land subdivided prior to the effective date of the Inclusionary Housing Ordinance shall pay a Housing Impact Fee (\$2,925 per unit, since October 1993).

See program 3.14 (below) for an accounting of these fees in the City's Housing Trust Fund.

### **OBJECTIVE 3.7 (LOWER INCOME DEVELOPMENT AND INCENTIVES)**

Provide incentives, housing type alternatives, and city initiated developments and programs for the assistance of lower-income household.

#### **PROGRAM 3.7.a (DENSITY BONUS)**

Develop an ordinance that implements Government Code section 65913.4 and 65915. (Density Bonus) These sections require the City to grant a minimum of a 25 percent bonus over the otherwise allowed density, **AND** one or more additional economic incentives or concessions that 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 minimum 25 percent, mixed use development, or other financial contributions in return for the developer guaranteeing that the project will reserve a minimum of 50 percent of the units for Senior or other special need households, or 20 percent of the units for low income households or 10 percent of the units for very-low income households. These units must remain affordable for a period of 30 years. Under the City's program each project should enter into an agreement with the City and this agreement will be monitored by the Housing and Redevelopment Dept. for compliance.

**FUNDING:** General Fund (administration only). Redevelopment Set-aside funds.  
**LEAD AGENCY:** Planning Dept., Housing and Redevelopment Dept.  
**TARGET YEARS:** Draft Ordinance 1991  
Ordinance adopted by the first quarter of 1992.

#### **PROGRESS '94-'95:**

This program was completed prior to the current reporting period.

An amendment to the City's Municipal Code, bringing the City's Density Bonus program into full compliance with the requirements of state law and integrating it with the City's Inclusionary Housing Ordinance, became effective on April 20, 1993.

#### **PROGRAM 3.7.b (ALTERNATIVE HOUSING)**

Consider development standards for alternative housing types, such as hotels, managed living units, homeless shelters, and farm worker housing alternatives which would assist in meeting the City's share of housing for low and very low income households.

Authorize alternative housing projects through a Conditional Use Permit or Special Use Permit. The City will also examine the existing Second Dwelling Unit Section of its Municipal Code (Section 21.42.010(11)(A)) to explore means of better encouraging and facilitating the development of affordable second units.

**FUNDING:** General Fund (administration only).  
**LEAD AGENCY:** Planning Dept., Housing and Redevelopment Dept.  
**TARGET YEARS:** Draft Ordinance 1991

Ordinance adopted by the first quarter of 1992.

#### PROGRESS '94-'95:

Important progress was made on this program during previous reporting periods. However, the program remains uncompleted.

A major revision to the City's Second Dwelling Unit Ordinance became effective on 6/21/94. The ordinance provides much greater flexibility for developers and existing homeowners wishing to make use of this housing concept. Of particular importance is the new ability of developers to incorporate rentable second dwelling units of up to 640 square feet in new single-family subdivisions. This option is proving to be of interest to developers as a tool to meet a portion of their 15 percent inclusionary housing requirements. During the '94 - '95 period two second units were constructed using the new ordinance.

On April 3, 1994, the City Planning Commission recommended an ordinance to the City Council to enable the development of "Managed Living Units". Under the proposed ordinance, Managed Living Units would be a variation on state law-enabled "efficiency units", that is, a housing product combining characteristics of Single Room Occupancy Hotels and studio apartments. If the ordinance were approved, they would be permitted by Conditional Use Permit in areas of the City zoned for hotels and would be defined to be a commercial land use. However, as of the end of the reporting period, the Council had not taken up the proposal.

#### POLICY 3.7.b

*Approvals and development of alternative housing types such as managed living units, transitional shelters, and migrant farm worker housing are contingent upon meeting the City's required lower income and special housing needs. Alternative housing types and their approvals may be denied should the finding be made that the project is not needed to meet the special or low-income housing needs of the community.*

#### PROGRAM 3.7.c (CITY INITIATED DEVELOPMENT)

The City of Carlsbad, through the offices of the Housing Authority and through the Housing and Redevelopment Department, will institute a New Housing Production Program that will create new units of housing affordable to households of low and very low income. The Housing and Redevelopment Dept. will work with private for-profit and especially not-for-profit developers. The program will use local funds from CDBG, redevelopment set-aside funds and other city originated funds and leverage them against State, Federal and private low interest funds to create these housing opportunities. **Target: Approximately 200 new units. Of these new units 100 will be affordable to very-low income households.**

**FUNDING:** Private Funding, State and Local funding.  
**LEAD AGENCY:** Planning Dept., Housing and Redevelopment Dept.  
**TARGET YEARS:** 1991

#### PROGRESS '94-'95:

In 1994-95, construction began on a 344 unit apartment project, with 241 (70%) of the units affordable to very low-income households (at 50 percent of the median family income) and 103 (30%) of the units affordable to low-income households (at 60 percent of the median family income). This apartment project, La Terraza, was a public/private partnership, with a not-for-profit and private residential developer assuming the role as the primary provider of housing. City assistance was provided in the form of: a) purchasing land and leasing it to the developer at a nominal fee, and b) a loan to assist with construction costs of the project.

Construction of La Terraza will be completed by the Fall of 1995. A leasing office has been

open since July 1995 and qualification worksheets for interested renters are being accepted.

The City has also been working with another developer of a 138 unit apartment project. All units will be affordable to very low-income households at 50 percent of the median family income. Lower-income families will be the focus of Laurel Tree apartments, with 46 three bedroom units and 14 four bedroom units.

A Site Development Plan (SDP) for the project has been submitted and will be scheduled for Planning Commission review in September 1995 and City Council review in October 1995. The City has committed \$500,000 in Redevelopment Set-Aside funds to the Laurel Tree project contingent upon receipt of HOME funds.

#### **POLICY 3.7.c**

*Of the total units developed under the Housing Authority New Construction Programs, 100 units will be affordable to households of very-low income.*

**FUNDING:** Local, CDBG, Redevelopment set-aside funds, State and Federal loan and grant funds. Private funding from various sources.

**LEAD AGENCY:** Housing and Redevelopment Dept..

**TARGET:** Approximately 200 new units. Of these new units, 100 units will be affordable to very low income households.

#### **PROGRESS '94-'95:**

In 1994-95, construction began on a 344 unit apartment project, with 241 (70%) of the units affordable to very low-income households (at 50 percent of the median family income) and 103 (30%) of the units affordable to low-income households (at 60 percent of the median family income). This apartment project, La Terraza, was a public/private partnership, with a not-for-profit and private residential developer assuming the role as the primary provider of housing. City assistance was provided in the form of: a) purchasing land and leasing it to the developer at a nominal fee, and b) a loan to assist with construction costs of the project.

Construction of La Terraza will be completed by the Fall of 1995. A leasing office has been open since July 1995 and qualification worksheets for interested renters are being accepted.

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A Site Development Plan (SDP) for the project has been submitted and will be scheduled for Planning Commission review in September 1995 and City Council review in October 1995. The City has committed \$500,000 in Redevelopment Set-Aside funds to the Laurel Tree project contingent upon receipt of HOME funds.

#### **PROGRAM 3.7.d (SECTION 8)**

Continue the City's Section 8 program to provide additional assisted housing opportunities in the Housing Element Period 1991-1996. **Target:** Approximately 100 additional households.

**FUNDING:** Federal Section 8 funding.

**LEAD AGENCY:** Housing and Redevelopment Dept.

**TARGET YEARS:** 1991-1996

**PROGRESS '94-'95:**

In 1994-95, the City was unsuccessful in its application to HUD for additional Section 8 certificates/vouchers. The City has a total of 503 Section 8 certificates/vouchers available to provide rental assistance to very low-income households.

**POLICY 3.7.e**

Public Facilities Fees (PFF) may be waived for lower income housing projects pursuant to City Council Policy 17.5.e., which states in part: *The City Council may grant an exception for a low cost housing project where the City Council finds such a project consistent with the Housing Element of the General Plan and that such an exception is necessary. In approving an exception for low cost housing the City Council may attach conditions, including limitation on rent or income levels of tenants. If the City Council finds a project is not being operated as a low cost housing project in accordance with all applicable conditions, the fee, which would otherwise be imposed by this chapter, shall immediately become due and payable.*

**PROGRAM 3.7.e (FEE WAIVER)**

Implement City Council Policy number 17 under which public facility fee would be waived for lower income housing projects. Developments for which Public Facility Fees are waived may be subject to an analysis of the fiscal impacts of the project to the City.

**FUNDING:** Redevelopment Set-aside funds.  
**LEAD AGENCY:** Planning Dept, Housing and Redevelopment Dept. Finance Dept  
**TARGET YEARS:** 1991-1996

**PROGRESS '94-'95:**

As allowed by City Council Policy Number 17, housing projects, which provide dwelling units affordable to lower income households may be exempted from the payment of the City's Public Facilities Fees, where the City determines that such exemption is necessary for the financial feasibility of such a project. Prior to the current reporting period, the City Council approved La Terraza, a 344 unit affordable housing project, which the City found to be exempt from the requirement to pay the PFF, per City Council Policy 17.5.e. In 1995-96 the City anticipates that the Laurel Tree Apartment project, a 138 unit affordable housing project, will request exemption from the payment of the City's Public Facilities Fees.

**PROGRAM 3.7.f (PRIORITY PROCESSING)**

Implement priority processing for lower-income development projects. The priority processing would include an accelerated plan-check process. The priority processing would be limited to projects which would not need extensive engineering or environmental review.

**FUNDING:** General Fund(administration only) CDBG funds  
**LEAD AGENCY:** Community Development Dept.  
**TARGET YEARS:** 1991

**PROGRESS '94-'95:**

This program has been implemented, but continues to evolve.

**Prior Reporting Periods.** Prior to the current reporting period the City established a new procedure for the processing of residential projects. Preliminary consultation with key senior City staff of several departments enabled issues and problems to be defined and resolved early

in the process. Importantly, this consultation enabled staff and the developer to negotiate any requested project incentives (density bonuses, financial incentives, deviations in development standards, project design concepts, etc). Once a project was submitted to the City for review and approval, it was assigned to an interdepartmental team to be expedited through the approval and hearing process.

The City used a "fast track" processing system and "team" approach to quickly gain approval of the discretionary permit applications required for a lower income affordable housing project known as La Terraza. A complete application was submitted to the City of Carlsbad on August 23, 1993 and the project was approved by the City Council on October 26, 1993. Also, on October 26, 1993, the City agreed to purchase property for the project through the use of Redevelopment Low and Moderate Income Housing Funds on an interim basis and federal Community Development Block Grant Funds on an interim basis and federal Community Development Block Grant Funds on a long term financing basis. Escrow on the property closed on November 15, 1993. This "fast track" processing assisted BRIDGE, the non-profit organization, in their efforts to submit an application for Low Income Housing Tax Credits by April 15, 1994.

**'94 - '95 Reporting Period** During the '94-'95 reporting period the Community Development Department (the collective Engineering, Planning, Building, and Housing/Redevelopment Departments) began a systematic, long-term and comprehensive evaluation of the entire organization, including its mission, goals, programs, and procedures. From this effort, many changes are expected that will increase the effectiveness and efficiency by which the City processes all development proposals. One particular area undergoing evaluation is the fast-track process for affordable housing. This effort is continuing into the 1995 -1996 reporting period.

#### **PROGRAM 3.7.g (IN-KIND IMPROVEMENTS)**

The City will implement a program to contribute to selected lower-income housing development, in-kind infrastructure improvements that may include but not be limited to: street improvements, sewer improvements, other infrastructure improvements as needed.

**FUNDING:** CDBG funds, Redevelopment tax increment and set-aside funds, General fund.

**LEAD AGENCY:** Community Development Department

**TARGET YEARS:** 1992

#### **PROGRESS '94-'95:**

While this program remains a possible tool for City assistance in the development of affordable housing projects, both limitations on City resources and the types of project which were proposed during the reporting period resulted in the program not being used during the reporting period.

#### **POLICY 3.7.h.**

*In order to enable the development of affordable housing, the City will accommodate General Plan Amendments to increase residential densities on all PC and LC zoned properties and all other residentially designated properties. Any proposed General Plan Amendment request to increase site densities for purposes of providing affordable housing, will be evaluated relative to the proposal's compatibility with adjacent land uses and proximity to employment opportunities, urban services or major roads. These General Plan Land Use designation changes will enable up to 23 dwelling units per acre, and, in conjunction with a twenty-five*

*percent density bonus, up to 29 dwelling units per acre.*

**PROGRAM 3.7.i**

In order to enable the development of affordable housing, the City shall adopt a mechanism to allow discretionary consideration of density increases above the maximum now permitted by the General Plan. This mechanism will include either; a Conditional Use Permit (CUP), Site Development Plan (SDP) or Affordable Housing Overlay Zone.

**FUNDING:** General Fund (administration only)  
**LEAD AGENCY:** Planning Department  
**TARGET YEARS:** 1992

**PROGRESS '94-'95:**

This program has been implemented.

On April 13, 1993, prior to the current reporting period, the City Council adopted amendments to the Land Use Element of the General Plan. These amendments included the addition of language which implements Policy 3.7 (above). The mechanism to grant additional density is a Site Development Plan, during the approval of which the City conducts a review of certain defined location and compatibility criteria. These changes were re-affirmed by the City Council in October 1994 during its hearings on the comprehensive revision of the City's General Plan. These density provisions are separate from, but complement the City's ordinance implementing state density bonus law.

Via these changes those residential projects which will meet their lower-income housing obligations on-site may request the use of a variety of City-provided tools and incentives to help make feasible the financial needs or site design of their projects. Among others, these tools include increased project densities and (where necessary) design flexibility to assure the additional density can be accommodated on the site.

**PROGRAM 3.7.j**

The City shall implement, through new ordinances, Housing Programs 2.2 (Development Standards), 3.6.a (Inclusionary), 3.7.a (Density Bonus) and 3.7.b (Alternative Housing) by the end of 1992.

**FUNDING:** Existing staff (General Fund)  
**LEAD AGENCY:** Planning Department  
**TARGET YEAR:** End of 1992.

**PROGRESS '94-'95:**

This program has been completed.

As has been reported above under their individual program descriptions, all of these ordinances have been adopted, either prior to or within the current reporting period.

**OBJECTIVE 3.8 (GROWTH MANAGEMENT)**

Ensure that incentive programs, such as density bonus programs and new development programs are compatible and consistent with the City's Growth Management Ordinance.

### **POLICY 3.8.**

Pursuant to Council Policy number 43 (which is hereby modified as indicated):

*Residential development that does not yield the maximum allowable number of units under the growth management control point are considered to have "excess units". These excess units are allocated to be developed under the following priority.*

1. *Housing development for low and very low households as defined by Cal. Government Code Section 65915.*
2. *Senior Citizen housing as defined by Carlsbad Municipal Code Section 21.18.045*
3. *In-fill Single Family Subdivisions, zoned R-1, that meet all development standards and where lot sizes are equal to or greater than adjacent subdivided R-1 properties.*
4. *Projects within the existing general plan density range that provide, without other compensation, for some significant public facility not required as part of the development process.*
5. *Projects proposing a zone change from non-residential to residential based on the following findings;*
  - a) *The property was zoned for other than residential use on July 1, 1986.*
  - b) *The property is compatible for residential use without significant mitigation.*
  - c) *The density of the project does not exceed the Growth Management Control Point of any adjacent **developed** residential property.*

### **PROGRAM 3.8**

Formalize the concept of an Excess Dwelling Unit Bank. The "bank" should be an accounting system to keep track of "excess units" anticipated under the city's Growth Management Plan, but not utilized by developers in approved projects. Surplus units would be available for inclusion in other projects using such tools as density transfers, density bonuses and changes to the General Plan land use designations.

**FUNDING:** Existing Staff (General)  
**LEAD AGENCY:** Planning Dept., Growth Management Division.  
**TARGET YEARS:** 1991

#### **PROGRESS '94-'95:**

Prior to the reporting period, accounting mechanisms for the Excess Unit Bank were developed and put into practice. The number of excess units available in each of the four quadrants of the City was determined. Now, both deposits and withdrawals of excess units are being made to the quadrant accounts as a function of development approvals. During the '94-'95 reporting period, withdrawals for projects providing lower-income housing were given first priority, in keeping with Council Policy 43.

### **OBJECTIVE 3.9 (SPECIAL HOUSING NEEDS PRIORITIES)**

Ensure that new development constructed by the private sector, and public funds allocated for lower-income and special needs groups, will meet the City's lower-income housing needs.

### **POLICY 3.9**

*New development and housing that is set aside for low and very low income households will address the unmet housing needs of the community by priorities set by the Housing Authority through the Planning Department and the Housing and Redevelopment Agency.*

**PROGRAM 3.9**

The City will annually set priorities for its future lower-income and special housing needs. The priorities will be set by the Housing and Redevelopment Dept. with assistance from the Planning Department and approved by the City Council. Priority given to the housing needs for lower-income subgroups (i.e., handicapped, seniors, large-family, very-low income) will be utilized for preference in the guidance of new housing constructed by the private sector and for the use of fund used or allocated by the City for construction or assistance to low income projects. Setting priorities is necessary to focus the limited amounts of available financial resources on housing projects that will address the City's most important housing needs. Priorities will be set annually as needs fluctuate according to how well they are accommodated over time.

**FUNDING:** Redevelopment set-aside funds.  
**LEAD AGENCY:** Housing and Redevelopment Dept.  
**TARGET YEAR:** 1991-1996

**PROGRESS '94-'95:**

In May 1994, City Council approved Carlsbad's 1995-99 federally-mandated Consolidated Plan submission. The purpose of the Consolidated Plan is to provide the City with: 1) a comprehensive assessment of housing needs over a five year period, 2) a coordinated housing development plan incorporating Federal, State, and local public and private resources; and 3) an annually-updated implementation plan with provisions for monitoring by HUD.

Through the Consolidated Plan, the City has established its priorities for providing affordable housing opportunities and for the focus of its investments of available resources among the differing lower income groups, as well as types of households (i.e., elderly, large, small, and other households). The priorities established by the Consolidated Plan emerged from many considerations, among them the City's analysis of its housing stock and market conditions, its analysis of the relative housing needs of its lower income households, and its assessment of the resources that are likely to be available. The Consolidated Plan fulfills Program 3.9.

**OBJECTIVE 3.10 (MODERATE INCOME)**

Provide a range of new housing opportunities affordable to moderate-income households in all areas of the City. *Target: Approximately 1300 units*

**PROGRAMS 3.10.a (MORTGAGE REVENUE BOND)**

The City will encourage the development, subject to market conditions and feasibility, of a minimum of 200 new units affordable to first-time home buyers of moderate income through a City-funded mortgage revenue bond program. The program will be limited to first-time home buyers who rent or work in Carlsbad.

**FUNDING:** Mortgage Revenue Bonds  
**LEAD AGENCY:** Housing and Redevelopment Dept., Finance Dept.  
**TARGET YEARS:** 1992-1996

**PROGRESS '91-'94:**

The City is committed to supporting, encouraging and assisting not-for-profit and other private organizations to construct housing affordable to lower income and moderate income first time home buyers. The City will use its available resources to assist private developers in providing such affordable housing opportunities.

The City has determined that it is currently not able to pursue the issuance of City- issued

mortgage revenue bonds because of the typical size of such bonds and the related administration burden. However, the City is participating in a Mortgage Credit Certificate Program, which is comparable to the Mortgage Revenue Bond Program, and will further investigate the possibility of participating in other mortgage revenue bonds, such as programs offered by CHFA. See Program 3.10b (following) for additional information about the Mortgage Credit Certificate program.

#### **PROGRAM 3.10.b (LENDING PROGRAMS)**

The City's Housing Authority and Housing and Redevelopment Dept. will work with local lenders and the local development community to secure funding and develop additional lending programs through local private and State and Federal housing programs for moderate income, and especially first-time home buyers.

**FUNDING:** Private Lenders, State and Federal agencies.  
**LEAD AGENCY:** Housing and Redevelopment Dept.  
**TARGET YEARS:** 1991-1999

#### **PROGRESS '94-'95:**

The City has been working to develop first time home buyer programs. In 1994-95, the City has primarily focused on obtaining Mortgage Credit Certificates (MCCs) to offer to first time home buyers in the community. The City had an MCC allocation of \$1,968,000 to provide approximately 22 MCCs. As of June 1995, seven MCCs were issued to assist low and moderate-income households purchase a home.

Due to the scarcity of local, state and federal resources and other affordable housing strategies being pursued, the City has not been able to develop other first time home buyer programs, such as a down-payment/closing cost assistance or other lending programs.

Through the refunding of existing multi-family housing bonds, the City and private owners have preserved and extended the low-income affordability of 106 units set aside in two projects, Seascape Apartments and Park La Costa Apartments.

#### **POLICY 3.10.c**

A minimum of 5 percent of all units approved for any master and specific planned community will be affordable to moderate income first-time home buyers.

#### **PROGRAM 3.10.c (MODERATE INCLUSIONARY)**

To assure the provision of a full range of housing opportunities for all income groups in master and specific planned communities, the City will develop an inclusionary program to implement Policy 3.10.c *Target: Approximately 200 units.*

**FUNDING:** Private Lenders, Mortgage Revenue Bonds, State and Federal Funds.  
**LEAD AGENCY:** Planning Dept., Housing and Redevelopment Dept.  
**TARGET YEARS:** 1991-1996

#### **PROGRESS '94-'95:**

The City Council adopted policy 3.10 with the Housing Element in 1992 and again with the comprehensive update to the City's General Plan in October 1994. However, during hearings in April 1993 on the then proposed Inclusionary Housing Ordinance, the City Council deleted the five-percent moderate-income requirement in the ordinance. The result is that the City is,

at this time, relying on the free market to provide moderate income housing.

### OBJECTIVE 3.11 (SMALLER, MORE AFFORDABLE HOUSING)

Reduce the size of housing, thereby reducing costs and increasing affordability.

#### POLICY 3.11

*Residential subdivisions may be approved with lots smaller than required in the underlying zone, but only when the size of the structures is reduced so as to yield less costly houses. The City will consider alternative measures, including, but not limited to, height limits, lot coverage limits, and maximum floor area ratios as the means to control the size of structures on these smaller lots.*

#### PROGRAM 3.11

The Planning Department shall study the relationship between the size of houses, lot sizes, density, and construction and development costs. Some single family detached and attached houses should be built on smaller lots; and have smaller floor areas than the private sector currently provides, so as to reduce development and construction costs. Smaller homes at lower costs would create housing more affordable to moderate income households. The study will present findings together with recommendations on: minimum sizes for permitted substandard lots, the appropriate floor areas for associated houses; and the applicability of providing density bonuses so as to achieve reduced development costs. Small lot subdivisions will continue to be approved only through Planned Developments (Municipal Code Section 21.45)

**FUNDING:** General Fund(administration only)  
**LEAD AGENCY:** Planning Dept.  
**TARGET YEARS:** 1991-1996

#### PROGRESS '94-'95:

Prior to the current reporting period the City performed economic studies on the costs of developing affordable housing within the City. The original study, conducted in the summer of 1991, was entitled: Economics of Developing Affordable Housing. This study was updated in 1993. Among many other things, the study analyzed the roles of unit density and land costs and their impact to the over-all cost of housing affordable to both lower- and moderate-income households. This study implements the call by Program 3.11 for a study of the relationships between lot sizes, housing sizes and costs.

The City's existing regulations (both zoning and planned residential developments) authorize the use of small-lot subdivisions. Together with expanded opportunities for density bonuses, the City believes that this program has been completed without the creation of additional special regulations.

### OBJECTIVE 3.12 (LAND BANKING)

Provide adequate land for low income and moderate housing development throughout the city.

#### PROGRAM 3.12

The City will implement a land banking program under which it would acquire land suitable for development of housing affordable to lower and moderate income households. The proposed

Land Bank will accept contributions of land in-lieu of housing production required under an inclusionary requirement, surplus land from City, County, State or Federal governments, 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 developed undertaken by the City or other parties.

**FUNDING:** CDBG, Redevelopment Set aside funds, General Funds (admin only)  
**LEAD AGENCY:** Planning Dept., Housing and Redevelopment Dept.  
**TARGET YEARS:** 1992

**PROGRESS '94-'95:**

The City is committed to assisting not-for-profit and other private developers to construct housing affordable to lower income households. When necessary, the City will pursue the acquisition of property for the purpose of retaining ownership of the property and leasing it to residential developers for a nominal fee to help reduce the development costs of providing affordable housing to lower income households.

Competing priorities for the City's limited housing funds resulted in no progress on this program during the '94-'95 reporting period in terms of acquisition of land by the City. No contributions of land in-lieu of housing production were accepted.

**OBJECTIVE 3.13 (COMMUNITY REINVESTMENT ACT)**

Monitor the lending practices of local lending institutions for compliance under the Community Reinvestment Act to evaluate lending activities and goals towards meeting the communities credit needs.

**POLICY 3.13**

*The City will annually evaluate its banking practices with local and regional lending institutions based on CRA lending reports. The City will reevaluate its relationship with lending institutions that are substantially deficient in their CRA ratings.*

**PROGRAM 3.13**

The Housing and Redevelopment Dept., in conjunction with the Finance Department and the City Treasurer will monitor and evaluate local lending institution's compliance with the C.R.A. Lending institutions which are deficient in meeting C.R.A. lending responsibilities in areas such as multi-family construction and lending for affordable housing will be identified. The City will explore means to encourage greater lending activities in Carlsbad.

**FUNDING:** CDBG fund, Redevelopment Set-aside funds  
**LEAD AGENCY:** Housing and Redevelopment Dept., Finance Dept., City Treasurer  
**TARGET YEARS:** 1991-1996

**PROGRESS '94-'95:**

During the reporting period Housing and Redevelopment Department staff members met with financial institutions interested in fulfilling their C.R.A. obligations by possibly providing multi-family construction loans for affordable residential developments.

A major success story in this area is realized in an affordable housing project, La Terraza, under construction in Carlsbad. Construction financing was committed to the project by Wells Fargo Bank as one of the first affordable housing loans made under an historic new financing program referred to as the World/Bridge initiative. This initiative brought together BRIDGE,

World Savings and Loan, the California Public Employees Retirement System, the California State Teachers Retirement System, Wells Fargo Bank, Bank of America, and the Ford Foundation to create a construction lending pool of \$340 million for affordable housing. Additionally, Great Western Bank has provided La Terraza with its permanent financing.

Developers of a 138 unit affordable housing project, Laurel Tree Apartments, have also received a pre-development loan and a commitment from Bank of America for the permanent financing of the project.

In 1995-96, Housing and Redevelopment Department staff will continue to contact local lending institutions for possible participation with the City in providing lending programs for lower and moderate-income first time homebuyers. In addition, as part of the City's requirement to conduct a fair housing assessment of the community, the City may review the lending practices of local lending institutions.

### **OBJECTIVE 3.14 (HOUSING TRUST FUND)**

The City will create a Housing Trust fund to facilitate the construction and rehabilitation of affordable housing.

#### **PROGRAM 3.14**

The City will create a Housing Trust Fund for the fiduciary administration of monies dedicated to the development, preservation and rehabilitation of housing in Carlsbad. The Trust Fund will be the repository of all collected in-lieu fees, CDBG and tax-increment funds targeted for proposed housing as well as other, local, state and federal and other collected funds.

**FUNDING:** In-lieu fees, tax increment funds, real property transfer tax, and CDBG funds, local, state and federal funds.

**LEAD AGENCY:** Housing and Redevelopment Dept., Finance Dept.

**TARGET YEARS:** 1992

#### **PROGRESS '94-'95:**

The City's Housing Trust Fund does not consist of a singular repository for all fees or other funds collected for the purpose of providing affordable housing. Separate accounts for each source of funding have been and will continue to be established because of a) the need to adequately monitor the receipt and expenditure of funds, and b) the regulatory requirements of some fund sources, such as Federal CDBG funds and other funds.

Separate accounts have been established as the repository of these collected Impact and/or In-Lieu Fees. As of 8/01/95, no Inclusionary Housing In-Lieu Fees have been collected by the City. In contrast, the Housing Impact Fee account contained \$814,207 (including earned interest and less portfolio management fees).

In addition, the City has existing accounts for CDBG funds to be used for the acquisition of real property for affordable housing and for the rehabilitation of homes owned and occupied by lower income households.

Additional accounts will be established as additional revenue sources are identified and funds from these sources are collected.

**OBJECTIVE: 3.15 (HOUSING ELEMENT/ANNUAL REPORT)**

Ensure that the Housing Element retains its viability and usefulness through annual amendments, review and monitoring.

**PROGRAM 3.15**

To retain the Housing Element as a viable policy document, the Planning Dept. will undertake an annual review of the Housing Element and schedule an amendment if required. Staff will also develop a monitoring program and report to the City Council annually on the progress and effectiveness of the housing programs. This monitoring program will be in conjunction with new State of California requirements regarding annual reports.

**FUNDING:** General Fund  
**LEAD AGENCY:** Planning Dept.  
**TARGET YEARS:** 1991-1996

**PROGRESS '94-'95:**

This document constitutes the 1994 - 1995 annual Housing Element report called for by both state law and Program 3.15.

Recent changes to state law (in particular Government Code Section 65400) have clarified and made more specific the requirements of the annual Housing Element report.

This report was prepared cooperatively by staff of the Housing and Redevelopment Department and the Planning Department. It incorporates the changes to state law and the adopted standards and definitions of HUD, the state of California, and the Housing Element Advisory Committee, a group formed in 1994 which consists of elected officials, builders, bankers, and housing advocates which operates under the auspices of the San Diego Association of Governments.

**GOAL 4 (HOUSING, JOBS, WORK FORCE BALANCE)**

Maintenance of a high quality of life and a strong local economy through a balance of residential and non-residential development, in particular, a balance of the skills desired and wages offered by local employers; the skills and education possessed, and wages earned by the local work force; and the cost of local housing.

**OBJECTIVE 4.1 (HOUSING IMPACT FEE)**

Achieve a balance between 1) the numbers of local jobs created relative to the availability of housing, and 2) the cost of housing relative the wages that are offered.

**PROGRAM 4.1**

The City will study the impact of commercial and industrial development on housing demand, and the ability of local employees to afford local housing. Where adverse impacts are identified, mitigation measures will be considered to reduce the impact.

These measures will include, but are not limited to, the requirement for commercial and industrial developers and employers to contribute an in-lieu fee towards the production of affordable housing and employer assistance to finance affordable housing for their employees.

**FUNDING:** CDBG funds., General Fund (administration only)

**LEAD AGENCY:** Planning Dept.  
**TARGET YEARS:** 1992

**PROGRESS '94-'95:**

During late 1993 and the first half of 1994 City staff prepared a study entitled: Economic Nexus Analysis/Housing Linkage Fee - Non-Residential Development. This study examined the relationship between the construction of new, non-residential buildings and the demand for additional housing affordable to lower-income households. The study found that each of six types of analyzed non-residential buildings created new demands for low-income affordable housing and it quantified that demand for each building-type. The study then quantified the "gap" that exists between what a lower-income family can afford to pay for housing and the actual construction costs for multi-family apartment and condo housing in Carlsbad. The report then calculated a theoretical maximum "justified pure nexus housing impact fee" that might be charged for new construction on each of the six types of non-residential buildings. The study concluded with a discussion of a range of alternative approaches to fees which would be lower than the theoretical maximum "pure nexus" fee.

Although the study was completed within the 1993 - 1994 reporting period, the City Council has deferred taking up the matter for discussion. When the Council does take up the matter, possible responses to the study will be for the Council to: accept and file the study, direct that an ordinance be prepared to create a non-residential housing impact fee (incorporating any number of possible "pure nexus" or alternative fees), or to direct that additional study be undertaken to further refine the concept of a non-residential linkage fee or its implementation.

**GOAL 5 (RESOURCE CONSERVATION)**

New and redeveloped housing which conserves natural resources, in particular energy and water.

**OBJECTIVE 5.1 (ENERGY CONSERVATION)**

Promote energy conservation in new housing development.

**PROGRAM 5.1**

The City will continue to implement energy conservation measures in new housing development through State Building Code, Title 24 regulations, and solar orientation of major subdivisions through Title 20., Chapter 17 of the Municipal Code.

**FUNDING:** Private funding  
**LEAD AGENCY:** Community Development Dept.  
**TARGET YEARS:** 1991-1996

**PROGRESS '94-'95:**

The City has continued to implement all California Title 24 energy conservation standards and requirements.

**OBJECTIVE 5.2 (WATER CONSERVATION)**

Promote resource conservation including water conservation in new housing development.

## PROGRAM 5.2

New housing construction developed under a water emergency may be required to develop strict conservation guidelines, including but not limited to, mandatory installation of low flush and low flow bathroom and kitchen fixtures, xerophytic landscaping or suspension of landscaping requirements until the water emergency is lifted, and requiring the use of reclaimed water in all construction grading projects. Any such actions shall be in accord with policies adopted by the City in response to declared emergencies.

**FUNDING:** Private funding  
**LEAD AGENCY:** Community Development Dept.  
**TARGET YEARS:** 1991

### PROGRESS '94-'95:

In 1990 the Carlsbad Municipal Water District (operated by the City of Carlsbad) adopted (Ordinance No. 31) water reclamation standards based upon the County Water Authority's model ordinance.

Ordinance NS 170 was adopted by the City Council in September 1991 and requires the use of ultra low-flush toilets (maximum of 1.6 gallons) in new construction, and when toilets are being replaced in existing structures. Other low-flow fixtures are also required.

Landscape standards of the Carlsbad Landscape Manual (which standards follow the State of California model ordinance) were formally incorporated into the Carlsbad Municipal Code by Ordinance NS 219 in December 1992.

## GOAL 6 (OPEN AND FAIR HOUSING OPPORTUNITIES)

All Carlsbad housing opportunities (ownership and rental, fair-market and assisted) offered in conformance with open housing policies and free of discriminatory practices.

### OBJECTIVE 6.1 (FAIR HOUSING)

Disseminate and provide information on fair housing laws and practices to the community.

#### PROGRAM 6.1

The Housing Authority and Housing and Redevelopment Dept will make information on "fair housing law and practices" available to all tenants, property owners and other persons involved in the sale and rental of housing throughout Carlsbad on an ongoing basis.

**FUNDING:** CDBG funds, Section 8 administration funds.  
**LEAD AGENCY:** Housing and Redevelopment Dept.  
**TARGET YEARS:** 1991-1996

### PROGRESS '94-'95:

The City has contracted with Heartland Human Relations and Fair Housing Association since 1989 to provide a fair housing education and counseling program. Heartland continues to disseminate information and educate the public, as well as City staff, regarding compliance with fair housing laws.

In 1994-95, Heartland participated in several seminars in the North County area. Heartland also participated in both the San Diego Homesellers/Homebuyers Fair and the San Diego Apartment Association's rental housing education conference and expo. Fair housing

information was dispensed at all seminars and exhibitions.

In November and December 1994, a Fair Housing Survey was distributed to a random sample of 2,000 Carlsbad residents. The purpose of the survey is to provide residents with information regarding fair housing laws and to determine the level of perceived housing discrimination within the community. The results showed that very few Carlsbad residents perceived there to be impediments to fair housing choice. A more detailed assessment of impediments to fair housing choice within the community will be undertaken in 1995-96.

## **PROGRAM 6.2**

The Housing Authority will continue its program of referrals to the appropriate agencies on complaints on fair housing issues. These complaints will be monitored as to the status of the complaint and will direct any action, if required, to the appropriate Local State or Federal agencies for further actions.

**FUNDING:** Section 8 administration Funds, CDBG funds.  
**LEAD AGENCY:** Housing Authority  
**TARGET YEARS:** 1991-1996

### **PROGRESS '94-'95:**

The City has contracted with Heartland Human Relations and Fair Housing Association since 1989 to provide a fair housing education and counseling program. In addition to providing information and educating the public, Heartland also processes complaints and responds to inquiries from tenants, landlords, and property owners. For 1994-95, Heartland responded to 41 inquiries and worked towards resolution of 7 housing discrimination complaints.

## **PROGRAM 6.3 (MILITARY, 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 Redevelopment Agency will provide information to local military and student housing offices of the availability of low-income housing in Carlsbad.

**FUNDING:** CDBG Funds, Redevelopment Set aside funds.  
**LEAD AGENCY:** Housing and Redevelopment Agency  
**TARGET YEARS:** 1991-1996

### **PROGRESS '94-'95:**

The City has previously contacted the housing offices of nearby military facilities, college campuses, and transitional and emergency housing facilities regarding the affordable housing programs and opportunities within the City of Carlsbad. Military facilities do not feel they have a need to provide such information to their personnel due to the military's own efforts at providing affordable housing for its personnel and the payment of a housing allowance to make non-military housing affordable.

In 1994-95 a housing information packet was distributed to nearby college campuses and other interested not-for-profit organizations. This housing information packet includes information on rental housing, home ownership opportunities, shared living arrangements, fair housing, and rehabilitation of homes. The City will continue to distribute this housing information packet to college campuses, Carlsbad employers, and other interested social service providers.

**Appendix 1**

**Carlsbad Housing Prices  
7/94 - 6/95**

**Including**

**Definitions of Affordable Housing Prices**



## Definitions of Affordable Housing Prices FY 94-95 Market-Rate Housing

**Rental Units.** In this reporting period, no market-rate rental units were built in the City. Therefore definitions of affordability are not provided.

**For-Sale Units.** Following is a definition of affordable prices for new for-sale housing constructed without public sector financial assistance ("market-rate" housing). It was developed by an ad hoc committee of housing and planning department officials and staff members from many of the nineteen jurisdictions within the jurisdiction of the San Diego Association of Governments, under the sponsorship of SANDAG. The resulting definitions and prices were reviewed by the SANDAG Board and the California Department of Housing and Community Development in 1993 and approved by both bodies for use in determining to what income groups newly constructed, market-rate housing is affordable. For F.Y. 1994-1995 input parameters to the definition were updated to reflect current H.U.D. estimates of median income for San Diego County. Otherwise the definition is unchanged.

### Definition

Affordable Sales Price = 3.0 x Annual Income for Class, Adjusted For Household Size.

This methodology provides a benchmark from which general affordability may be inferred. Actually, many factors help determine if a home purchase is affordable to a given family. These factors include: the individual family's actual income, the mortgage interest rate, down payment, loan origination fees, utility allowance, mortgage insurance requirements, homeowners' association fees, etc.

### Affordable Prices, by Household Size

Level of Income	No. of Bedrooms	Affordable Sales Prices	
		FY '93 - '94	FY '94 - '95
Very Very Low	Studio	\$27,675	\$28,620
	1	31,590	32,670
	2	39,510	40,860
	3	45,810	47,385
	4	52,155	53,955
	5	N/A	60,480
Very Low	Studio	\$46,125	\$47,700
	1	52,650	54,450
	2	65,850	68,100
	3	76,350	78,975
	4	86,925	89,925
	5	N/A	100,800
Low	Studio	\$73,800	\$76,320
	1	84,240	87,120
	2	105,360	108,960
	3	122,160	126,360
	4	139,080	143,880
	5	N/A	161,280
Moderate	Studio	\$110,700	\$114,480
	1	126,360	130,680
	2	158,040	163,440
	3	183,240	189,540
	4	208,620	215,820
	5	N/A	241,920

## New Construction Data - Condominiums

Sales Prices 6/94 - 7/95

Unit Type	Address	No. Beds	Price	Data Source	Affordable to
CONDO	1610a Warbler Court	3	\$196,990	Sanderling (Aviara)	Other
CONDO	1610b Warbler Court	3	\$196,990	Sanderling (Aviara)	Other
CONDO	1610c Warbler Court	3	\$196,990	Sanderling (Aviara)	Other
CONDO	1610d Warbler Court	3	\$196,990	Sanderling (Aviara)	Other
CONDO	1613a Warbler Court	3	\$196,990	Sanderling (Aviara)	Other
CONDO	1613b Warbler Court	3	\$196,990	Sanderling (Aviara)	Other
CONDO	1613c Warbler Court	3	\$196,990	Sanderling (Aviara)	Other
CONDO	1613d Warbler Court	3	\$196,990	Sanderling (Aviara)	Other
CONDO	6843a Adolphia Drive	3	\$201,990	Sanderling (Aviara)	Other
CONDO	6843b Adolphia Drive	3	\$201,990	Sanderling (Aviara)	Other
CONDO	6843c Adolphia Drive	3	\$201,990	Sanderling (Aviara)	Other
CONDO	1623a Baccharis Avenue	4	\$202,990	Sanderling (Aviara)	Other
CONDO	1623b Baccharis Avenue	4	\$202,990	Sanderling (Aviara)	Other
CONDO	1623c Baccharis Avenue	4	\$202,990	Sanderling (Aviara)	Other
CONDO	1623d Baccharis Avenue	4	\$202,990	Sanderling (Aviara)	Other
CONDO	1633a Baccharis Avenue	4	\$202,990	Sanderling (Aviara)	Other
CONDO	1633b Baccharis Avenue	4	\$202,990	Sanderling (Aviara)	Other
CONDO	1633c Baccharis Avenue	4	\$202,990	Sanderling (Aviara)	Other
CONDO	1633d Baccharis Avenue	4	\$202,990	Sanderling (Aviara)	Other
CONDO	1623a Warbler Court	4	\$207,397	Sanderling (Aviara)	Other
CONDO	1623b Warbler Court	4	\$207,397	Sanderling (Aviara)	Other
CONDO	6853a Adolphia Drive	3	\$226,990	Sanderling (Aviara)	Other
CONDO	6853b Adolphia Drive	3	\$226,990	Sanderling (Aviara)	Other
CONDO	6853c Adolphia Drive	3	\$226,990	Sanderling (Aviara)	Other
CONDO	6853d Adolphia Drive	3	\$226,990	Sanderling (Aviara)	Other
CONDO	6917a Thrush Place	3	\$229,900	Horton, D. R.	Other
CONDO	6917b Thrush Place	3	\$229,900	Horton, D. R.	Other
CONDO	6904a Avocet Court	3	\$237,900	Horton, D. R.	Other
CONDO	6904b Avocet Court	3	\$237,900	Horton, D. R.	Other
CONDO	6904c Avocet Court	3	\$237,900	Horton, D. R.	Other
CONDO	1613a Cormorant Drive	3	\$239,900	Horton, D. R.	Other
CONDO	1613b Cormorant Drive	3	\$239,900	Horton, D. R.	Other
CONDO	1613c Cormorant Drive	3	\$239,900	Horton, D. R.	Other
CONDO	1613d Cormorant Drive	3	\$239,900	Horton, D. R.	Other
CONDO	6905a Goldfinch Place	3	\$239,900	Horton, D. R.	Other
CONDO	6905b Goldfinch Place	3	\$239,900	Horton, D. R.	Other
CONDO	6905c Goldfinch Place	3	\$239,900	Horton, D. R.	Other
CONDO	1616a Cormorant Drive	3	\$248,000	Horton, D. R.	Other
CONDO	1616b Cormorant Drive	3	\$248,000	Horton, D. R.	Other
CONDO	1616c Cormorant Drive	3	\$248,000	Horton, D. R.	Other
CONDO	6905a Avocet Court	3	\$250,400	Horton, D. R.	Other
CONDO	6905b Avocet Court	3	\$250,400	Horton, D. R.	Other
CONDO	6905c Avocet Court	3	\$250,400	Horton, D. R.	Other
CONDO	6905d Avocet Court	3	\$250,400	Horton, D. R.	Other
CONDO	1644a Cormorant Drive	3	\$253,900	Horton, D. R.	Other

## New Construction Data - Condominiums

Sales Prices 6/94 - 7/95

Unit Type	Address	No. Beds	Price	Data Source	Affordable to
CONDO	1644b Cormorant Drive	3	\$253,900	Horton, D. R.	Other
CONDO	1628a Cormorant Drive	3	\$259,900	Horton, D. R.	Other
CONDO	1628b Cormorant Drive	3	\$259,900	Horton, D. R.	Other
CONDO	1628c Cormorant Drive	3	\$259,900	Horton, D. R.	Other
CONDO	1628d Cormorant Drive	3	\$259,900	Horton, D. R.	Other
CONDO	1600a Cormorant Drive	3	\$267,000	Horton, D. R.	Other
CONDO	1600b Cormorant Drive	3	\$267,000	Horton, D. R.	Other
CONDO	1600c Cormorant Drive	3	\$267,000	Horton, D. R.	Other
CONDO	1600d Cormorant Drive	3	\$267,000	Horton, D. R.	Other
CONDO	6904a Goldfinch Place	3	\$288,450	Horton, D. R.	Other
CONDO	6904b Goldfinch Place	3	\$288,450	Horton, D. R.	Other
CONDO	6904c Goldfinch Place	3	\$288,450	Horton, D. R.	Other
CONDO	6904d Goldfinch Place	3	\$288,450	Horton, D. R.	Other

Condo Sum =	184	\$13,496,164
Condo Mean =	3.17	\$232,692
Condo Median =		\$229,900
No. of Dwelling Units =	58	

## New Construction Data - Single Family Units

Prices (For-Sale or Custom Home) 6/94 - 7/95

Unit Type	Address	No. Beds	Price	Data Source	Affordable to
SFD	3843 Highland Drive	4	\$55,307	MetroScan	Low
SFD	1811 McCauley Lane	2	\$126,510	MetroScan	Moderate
SFD	3440 James Drive	4	\$156,380	MetroScan	Moderate
SFD	3303 James Drive	Unknown	\$177,308	MetroScan	Indeterminate
SFD	2607 Acuna Court	Unknown	\$177,308	MetroScan	Indeterminate
SFD	2723 Cazadero Drive	Unknown	\$223,600	MetroScan	Indeterminate
SFD	2832 Avenida Valera	3	\$240,990	La Costa Associates	Other
SFD	3103 Sitio Isadora	3	\$240,990	La Costa Associates	Other
SFD	2823 Avenida Valera	3	\$240,990	La Costa Associates	Other
SFD	3106 Sitio Isadora	3	\$240,990	La Costa Associates	Other
SFD	2831 Avenida Valera	3	\$240,990	La Costa Associates	Other
SFD	2969 Avenida Valera	3	\$240,990	La Costa Associates	Other
SFD	2950 Avenida Valera	5	\$240,990	La Costa Associates	Other
SFD	3330 Avenida Anacapa	3	\$258,900	CA Pacific Homes	Other
SFD	2963 Avenida Valera	5	\$259,990	La Costa Associates	Other
SFD	2947 Avenida Valera	5	\$259,990	La Costa Associates	Other
SFD	2972 Avenida Valera	4	\$259,990	La Costa Associates	Other
SFD	2971 Avenida Valera	4	\$259,990	La Costa Associates	Other
SFD	2957 Avenida Valera	5	\$259,990	La Costa Associates	Other
SFD	2959 Avenida Valera	5	\$259,990	La Costa Associates	Other
SFD	3102 Sitio Isadora	3	\$259,990	La Costa Associates	Other
SFD	2949 Avenida Valera	4	\$259,990	La Costa Associates	Other
SFD	2953 Avenida Valera	5	\$259,990	La Costa Associates	Other
SFD	3106 Corte Nina	5	\$259,990	La Costa Associates	Other
SFD	3105 Sitio Isadora	5	\$259,990	La Costa Associates	Other
SFD	2975 Avenida Valera	5	\$259,990	La Costa Associates	Other
SFD	3348 Camino Coronado	3	\$264,900	CA Pacific Homes	Other
SFD	3301 Avenida Anacapa	3	\$269,900	CA Pacific Homes	Other
SFD	3337 Avenida Obertura	3	\$269,990	Centex Homes	Other
SFD	3320 Corte Esplendor	5	\$269,990	Centex Homes	Other
SFD	3321 Corte Esplendor	4	\$269,990	Centex Homes	Other
SFD	3107 Corte Nina	4	\$269,990	La Costa Associates	Other
SFD	7811 Calle Jalisco	4	\$269,990	Centex Homes	Other
SFD	3324 Avenida Obertura	4	\$271,990	Centex Homes	Other
SFD	3360 Avenida Obertura	3	\$271,990	Centex Homes	Other
SFD	3319 Avenida Obertura	3	\$273,990	Centex Homes	Other
SFD	2970 Avenida Valera	5	\$273,990	La Costa Associates	Other
SFD	2952 Avenida Valera	4	\$273,990	La Costa Associates	Other
SFD	3107 Sitio Isadora	5	\$273,990	La Costa Associates	Other
SFD	2955 Avenida Valera	5	\$273,990	La Costa Associates	Other
SFD	3104 Sitio Isadora	5	\$273,990	La Costa Associates	Other
SFD	2842 Avenida Valera	4	\$273,990	La Costa Associates	Other
SFD	2965 Avenida Valera	4	\$273,990	La Costa Associates	Other
SFD	2951 Avenida Valera	5	\$273,990	La Costa Associates	Other
SFD	2973 Avenida Valera	4	\$273,990	La Costa Associates	Other

## New Construction Data - Single Family Units

Prices (For-Sale or Custom Home) 6/94 - 7/95

Unit Type	Address	No. Beds	Price	Data Source	Affordable to
SFD	2945 Avenida Valera	4	\$273,990	La Costa Associates	Other
SFD	2946 Avenida Valera	4	\$273,990	La Costa Associates	Other
SFD	2838 Avenida Valera	4	\$273,990	La Costa Associates	Other
SFD	2829 Avenida Valera	4	\$273,990	La Costa Associates	Other
SFD	2977 Avenida Valera	5	\$273,990	La Costa Associates	Other
SFD	2825 Avenida Valera	4	\$273,990	La Costa Associates	Other
SFD	7833 Sitio Calmar	3	\$274,990	Centex Homes	Other
SFD	3339 Corte Esplendor	4	\$274,990	Centex Homes	Other
SFD	3344 Avenida Obertura	4	\$274,990	Centex Homes	Other
SFD	3352 Avenida Obertura	4	\$276,990	Centex Homes	Other
SFD	3316 Calle San Blas	3	\$277,400	CA Pacific Homes	Other
SFD	3312 Calle San Blas	3	\$278,900	CA Pacific Homes	Other
SFD	3318 Calle San Blas	4	\$279,900	CA Pacific Homes	Other
SFD	3314 Avenida Anacapa	3	\$279,900	CA Pacific Homes	Other
SFD	3338 Avenida Obertura	3	\$279,990	Centex Homes	Other
SFD	3320 Avenida Anacapa	3	\$281,900	CA Pacific Homes	Other
SFD	3316 Avenida Obertura	3	\$281,990	Centex Homes	Other
SFD	3356 Avenida Obertura	3	\$281,990	Centex Homes	Other
SFD	3309 Avenida Anacapa	3	\$283,900	CA Pacific Homes	Other
SFD	6630 Towhee Lane	4	\$285,990	Greystone Homes	Other
SFD	6633 Towhee Lane	4	\$285,990	Greystone Homes	Other
SFD	6638 Towhee Lane	4	\$285,990	Greystone Homes	Other
SFD	6625 Towhee Lane	4	\$285,990	Greystone Homes	Other
SFD	6618 Towhee Lane	4	\$285,990	Greystone Homes	Other
SFD	6620 Towhee Lane	3	\$288,990	Greystone Homes	Other
SFD	6646 Towhee Lane	3	\$288,990	Greystone Homes	Other
SFD	6614 Towhee Lane	3	\$288,990	Greystone Homes	Other
SFD	2925 Avenida Valera	4	\$289,990	La Costa Associates	Other
SFD	3345 Avenida Obertura	3	\$289,990	Centex Homes	Other
SFD	2919 Avenida Valera	4	\$289,990	La Costa Associates	Other
SFD	7815 Calle Jalisco	5	\$289,990	Centex Homes	Other
SFD	7829 Sitio Calmar	3	\$291,990	Centex Homes	Other
SFD	3334 Camino Coronado	3	\$292,900	CA Pacific Homes	Other
SFD	7054 Rockrose Terrace	4	\$292,900	Warmington Homes	Other
SFD	7823 Calle Jalisco	4	\$292,990	Centex Homes	Other
SFD	3321 Avenida Obertura	4	\$293,990	Centex Homes	Other
SFD	7324 El Fuerte Street	Unknown	\$294,090	MetroScan	Other
SFD	3324 Corte Esplendor	5	\$294,990	Centex Homes	Other
SFD	3329 Corte Esplendor	4	\$297,990	Centex Homes	Other
SFD	3337 Corte Esplendor	4	\$297,990	Centex Homes	Other
SFD	3316 Avenida Anacapa	4	\$299,900	CA Pacific Homes	Other
SFD	3312 Avenida Anacapa	3	\$299,900	CA Pacific Homes	Other
SFD	7024 Rockrose Terrace	3	\$299,900	Warmington Homes	Other
SFD	3339 Avenida Obertura	4	\$299,990	Centex Homes	Other
SFD	7820 Sitio Calmar	4	\$299,990	Centex Homes	Other
SFD	3315 Avenida Anacapa	4	\$301,900	CA Pacific Homes	Other

## New Construction Data - Single Family Units

Prices (For-Sale or Custom Home) 6/94 - 7/95

Unit Type	Address	No. Beds	Price	Data Source	Affordable to
SFD	3314 Avenida Obertura	4	\$301,990	Centex Homes	Other
SFD	3320 Avenida Obertura	4	\$301,990	Centex Homes	Other
SFD	7090 Rockrose Terrace	4	\$303,900	Warmington Homes	Other
SFD	7050 Rockrose Terrace	4	\$303,960	Warmington Homes	Other
SFD	7062 Rockrose Terrace	4	\$304,795	Warmington Homes	Other
SFD	3303 Avenida Anacapa	3	\$304,900	CA Pacific Homes	Other
SFD	3325 Avenida Obertura	5	\$304,990	Centex Homes	Other
SFD	3333 Corte Esplendor	4	\$304,990	Centex Homes	Other
SFD	3297 Avenida Anacapa	3	\$305,900	CA Pacific Homes	Other
SFD	3328 Avenida Anacapa	3	\$307,900	CA Pacific Homes	Other
SFD	3326 Avenida Anacapa	4	\$307,900	CA Pacific Homes	Other
SFD	7825 Sitio Calmar	4	\$307,990	Centex Homes	Other
SFD	7034 Rockrose Terrace	4	\$308,400	Warmington Homes	Other
SFD	7058 Rockrose Terrace	5	\$309,000	Warmington Homes	Other
SFD	7078 Rockrose Terrace	4	\$309,900	Warmington Homes	Other
SFD	3325 Corte Esplendor	4	\$309,990	Centex Homes	Other
SFD	6996 Mimosa Drive	4	\$310,000	San Juan Group	Other
SFD	7071 Rockrose Terrace	4	\$310,900	Warmington Homes	Other
SFD	7040 Rockrose Terrace	5	\$311,573	Warmington Homes	Other
SFD	7810 Sitio Calmar	5	\$311,990	Centex Homes	Other
SFD	3342 Camino Coronado	4	\$312,900	CA Pacific Homes	Other
SFD	3308 Calle San Blas	4	\$312,900	CA Pacific Homes	Other
SFD	3328 Corte Esplendor	5	\$312,990	Centex Homes	Other
SFD	7827 Calle Jalisco	3	\$312,990	Centex Homes	Other
SFD	3348 Avenida Obertura	3	\$312,990	Centex Homes	Other
SFD	3315 Avenida Obertura	5	\$312,990	Centex Homes	Other
SFD	3364 Avenida Obertura	3	\$312,990	Centex Homes	Other
SFD	3335 Camino Coronado	4	\$314,900	CA Pacific Homes	Other
SFD	7028 Rockrose Terrace	5	\$314,900	Warmington Homes	Other
SFD	6634 Towhee Lane	4	\$314,990	Greystone Homes	Other
SFD	6624 Towhee Lane	4	\$314,990	Greystone Homes	Other
SFD	6639 Towhee Lane	4	\$314,990	Greystone Homes	Other
SFD	6610 Towhee Lane	4	\$314,990	Greystone Homes	Other
SFD	6642 Towhee Lane	4	\$314,990	Greystone Homes	Other
SFD	2929 Avenida Valera	5	\$315,990	La Costa Associates	Other
SFD	3318 Avenida Obertura	4	\$316,990	Centex Homes	Other
SFD	3296 Avenida Anacapa	3	\$317,900	CA Pacific Homes	Other
SFD	3332 Camino Coronado	3	\$317,900	CA Pacific Homes	Other
SFD	3332 Avenida Anacapa	3	\$318,900	CA Pacific Homes	Other
SFD	3310 Avenida Obertura	5	\$318,990	Centex Homes	Other
SFD	7026 Via Ostiones	4	\$319,000	La Costa Estates	Other
SFD	7022 Via Ostiones	4	\$319,000	La Costa Estates	Other
SFD	7030 Via Ostiones	4	\$319,000	La Costa Estates	Other
SFD	3328 Camino Coronado	4	\$319,285	CA Pacific Homes	Other
SFD	3336 Camino Coronado	4	\$319,900	CA Pacific Homes	Other
SFD	7066 Rockrose Terrace	5	\$319,900	Warmington Homes	Other

## New Construction Data - Single Family Units

Prices (For-Sale or Custom Home) 6/94 - 7/95

Unit Type	Address	No. Beds	Price	Data Source	Affordable to
SFD	3318 Avenida Anacapa	4	\$319,900	CA Pacific Homes	Other
SFD	3304 Calle San Blas	4	\$319,900	CA Pacific Homes	Other
SFD	3310 Avenida Anacapa	3	\$319,900	CA Pacific Homes	Other
SFD	3336 Corte Esplendor	2	\$319,990	Centex Homes	Other
SFD	3328 Avenida Obertura	3	\$319,990	Centex Homes	Other
SFD	3334 Avenida Obertura	3	\$319,990	Centex Homes	Other
SFD	6987 Zebrina Place	3	\$319,990	San Juan Group	Other
SFD	6963 Blue Orchid Lane	3	\$319,990	San Juan Group	Other
SFD	6982 Mimosa Drive	3	\$319,990	San Juan Group	Other
SFD	1409 Branta Avenue	4	\$320,695	Davidson Coscan	Other
SFD	3324 Avenida Anacapa	4	\$321,900	CA Pacific Homes	Other
SFD	7070 Rockrose Terrace	4	\$322,900	Warmington Homes	Other
SFD	3299 Avenida Anacapa	3	\$322,900	CA Pacific Homes	Other
SFD	3311 Avenida Anacapa	3	\$323,900	CA Pacific Homes	Other
SFD	3295 Avenida Anacapa	3	\$324,900	CA Pacific Homes	Other
SFD	7032 Rockrose Terrace	5	\$326,559	Warmington Homes	Other
SFD	7086 Rockrose Terrace	5	\$329,733	Warmington Homes	Other
SFD	7082 Rockrose Terrace	5	\$329,900	Warmington Homes	Other
SFD	6992 Mimosa Drive	4	\$330,000	San Juan Group	Other
SFD	3320 Calle San Blas	3	\$332,900	CA Pacific Homes	Other
SFD	3326 Calle San Blas	4	\$332,900	CA Pacific Homes	Other
SFD	3319 Avenida Anacapa	4	\$336,900	CA Pacific Homes	Other
SFD	1413 Branta Avenue	5	\$337,900	Davidson Coscan	Other
SFD	7308 Black Swan Place	4	\$338,900	Davidson Coscan	Other
SFD	3322 Avenida Anacapa	3	\$338,900	CA Pacific Homes	Other
SFD	3330 Camino Coronado	3	\$338,900	CA Pacific Homes	Other
SFD	7035 Rockrose Terrace	5	\$339,900	Warmington Homes	Other
SFD	3344 Camino Coronado	3	\$339,900	CA Pacific Homes	Other
SFD	3334 Avenida Anacapa	3	\$339,900	CA Pacific Homes	Other
SFD	3298 Avenida Anacapa	3	\$339,900	CA Pacific Homes	Other
SFD	3310 Calle San Blas	4	\$339,900	CA Pacific Homes	Other
SFD	7325 Black Swan Place	4	\$339,975	Davidson Coscan	Other
SFD	3306 Calle San Blas	4	\$341,900	CA Pacific Homes	Other
SFD	3307 Avenida Anacapa	3	\$341,900	CA Pacific Homes	Other
SFD	7318 Black Swan Place	4	\$342,100	Davidson Coscan	Other
SFD	3305 Avenida Anacapa	3	\$342,900	CA Pacific Homes	Other
SFD	7063 Rockrose Terrace	5	\$345,900	Warmington Homes	Other
SFD	3313 Avenida Anacapa	3	\$348,900	CA Pacific Homes	Other
SFD	3317 Avenida Anacapa	4	\$348,900	CA Pacific Homes	Other
SFD	3322 Calle San Blas	4	\$348,900	CA Pacific Homes	Other
SFD	3338 Camino Coronado	3	\$349,900	CA Pacific Homes	Other
SFD	3333 Camino Coronado	3	\$350,900	CA Pacific Homes	Other
SFD	1412 Branta Avenue	4	\$352,900	Davidson Coscan	Other
SFD	3314 Calle San Blas	4	\$355,400	CA Pacific Homes	Other
SFD	3324 Calle San Blas	4	\$358,900	CA Pacific Homes	Other

## New Construction Data - Single Family Units

Prices (For-Sale or Custom Home) 6/94 - 7/95

Unit Type	Address	No. Beds	Price	Data Source	Affordable to
SFD	7031 Rockrose Terrace	3	\$359,520	Warmington Homes	Other
SFD	3301 Calle San Blas	3	\$360,900	CA Pacific Homes	Other
SFD	7047 Rockrose Terrace	4	\$361,900	Warmington Homes	Other
SFD	7079 Rockrose Terrace	5	\$362,317	Warmington Homes	Other
SFD	7074 Rockrose Terrace	5	\$362,803	Warmington Homes	Other
SFD	7075 Rockrose Terrace	5	\$363,591	Warmington Homes	Other
SFD	6966 Mimosa Drive	4	\$365,000	San Juan Group	Other
SFD	7310 Black Swan Place	4	\$365,900	Davidson Coscan	Other
SFD	7027 Rockrose Terrace	4	\$366,900	Warmington Homes	Other
SFD	1411 Branta Avenue	3	\$366,900	Davidson Coscan	Other
SFD	7051 Rockrose Terrace	5	\$367,900	Warmington Homes	Other
SFD	7055 Rockrose Terrace	5	\$372,043	Warmington Homes	Other
SFD	7323 Black Swan Place	4	\$372,900	Davidson Coscan	Other
SFD	6976 Mimosa Drive	4	\$374,900	San Juan Group	Other
SFD	6995 Zebrina Place	4	\$374,990	San Juan Group	Other
SFD	7305 Black Swan Place	5	\$375,396	Davidson Coscan	Other
SFD	7322 Black Swan Place	4	\$377,545	Davidson Coscan	Other
SFD	1416 Branta Avenue	4	\$379,826	Davidson Coscan	Other
SFD	6991 Zebrina Place	4	\$380,000	San Juan Group	Other
SFD	6967 Mimosa Drive	4	\$380,000	San Juan Group	Other
SFD	7319 Black Swan Place	4	\$384,990	Davidson Coscan	Other
SFD	6957 Blue Ordid Lane	4	\$385,000	San Juan Group	Other
SFD	6994 Zebrina Place	4	\$385,000	San Juan Group	Other
SFD	6986 Zebrina Place	4	\$385,000	San Juan Group	Other
SFD	7324 Black Swan Place	4	\$389,263	Davidson Coscan	Other
SFD	6986 Mimosa Drive	4	\$389,940	San Juan Group	Other
SFD	6973 Mimosa Drive	4	\$389,990	San Juan Group	Other
SFD	6990 Blue Orchid Lane	4	\$390,000	San Juan Group	Other
SFD	7314 Black Swan Place	4	\$391,180	Davidson Coscan	Other
SFD	7059 Rockrose Terrace	5	\$391,201	Warmington Homes	Other
SFD	7067 Rockrose Terrace	5	\$391,462	Warmington Homes	Other
SFD	7083 Rockrose Terrace	5	\$398,221	Warmington Homes	Other
SFD	7306 Black Swan Place	4	\$398,661	Davidson Coscan	Other
SFD	6972 Mimosa Drive	4	\$399,990	San Juan Group	Other
SFD	1708 Lobelia Court	4	\$400,000	San Juan Group	Other
SFD	1710 Lobella Court	4	\$400,000	San Juan Group	Other
SFD	1707 Lobelia Court	4	\$400,000	San Juan Group	Other
SFD	7039 Rockrose Terrace	4	\$400,011	Warmington Homes	Other
SFD	7043 Rockrose Terrace	5	\$402,400	Warmington Homes	Other
SFD	7315 Black Swan Place	4	\$402,915	Davidson Coscan	Other
SFD	1417 Branta Avenue	4	\$403,900	Davidson Coscan	Other
SFD	1415 Branta Avenue	4	\$405,116	Davidson Coscan	Other
SFD	6990 Zebrina Place	4	\$405,990	San Juan Group	Other
SFD	7317 Black Swan Place	5	\$414,900	Davidson Coscan	Other
SFD	7307 Black Swan Place	4	\$418,900	Davidson Coscan	Other

## New Construction Data - Single Family Units

Prices (For-Sale or Custom Home) 6/94 - 7/95

Unit Type	Address	No. Beds	Price	Data Source	Affordable to
SFD	1711 Lobelia Court	4	\$425,000	San Juan Group	Other
SFD	1414 Branta Avenue	5	\$425,058	Davidson Coscan	Other
SFD	7320 Black Swan Place	4	\$429,900	Davidson Coscan	Other
SFD	7313 Black Swan Place	4	\$432,900	Davidson Coscan	Other
SFD	3612 Carlsbad Boulevard	3	\$450,000	MetroScan	Other
SFD	7321 Black Swan Place	5	\$475,136	Davidson Coscan	Other
SFD	7311 Black Swan Place	4	\$480,528	Davidson Coscan	Other
SFD	7309 Black Swan Place	4	\$493,964	Davidson Coscan	Other
SFD	7279 Spoonbill Lane	4	\$624,240	MetroScan	Other
SFD	7177 Aviara Drive	3	\$657,394	MetroScan	Other
<p>SFD Sum = 911 \$75,960,609</p> <p>SFD Mean = 3.84 \$320,509</p> <p>SFD Median = \$312,990</p> <p>No. of Dwelling Units = 237</p>					



**Appendix 2**

**City of Carlsbad  
Affordable Housing Projects**

PROJECT/LOCATION	DEVELOPER	DESCRIPTION	STATUS
<p><b>Sambi Project -</b> East of Paseo del Norte; North of Camino de las Ondas (SW Quadrant)</p>	<p>Tokoyhara America - private developer Tom Hageman - Planning Systems - Consultant</p>	<p>63 multi-family rental units affordable to low income (80%)</p>	<p>Approved by City Council. No anticipated construction date. Developer is discussing project with potential non-profit affordable housing developer.</p>
<p><b>Laurel Tree Apts. -</b> South side of Palo-mar Airport Road; East of College Blvd.; at Laurel Tree Street (SW Quadrant)</p>	<p>Jack Henthorn - Consultant MAAC Project - Non-profit Housing Developer Bramalea &amp; Kaiza - proposed developer participants</p>	<p>138 affordable multi-family rental units for lower income families and individuals. Families will be primary focus of project.</p>	<p>MAAC Organization (non-profit, private) to serve as project developer. City approved \$500,000 to assist project contingent upon receipt of HOME funds. SDP submitted and being processed by Planning. Anticipated to be scheduled for Planning Commission review in September and Council review in October, 1995. Proposed combined project for Bramalea and Kaiza to meet their affordable housing requirements.</p>
<p><b>La Terraza Project</b> North side of El Camino Real; South of Camino Vida Roble; North of Sunfresh Flower property (SW Quadrant)</p>	<p>Bridge Housing Co. - Non-profit developer &amp; owner of project.</p>	<p>344 Units, multi-family, mixed income/rents (50% &amp; 60% of median)</p>	<p>Satisfied Aviara's Inclusionary Housing Requirement (160 units) Currently under construction. It is anticipated that units will be available for leasing by the end of September, 1995. Applications currently being accepted for units.</p>
<p><b>Costa Do Sol -</b> located east of Paseo Del Norte and North of Camino de las Ondas (SW Quadrant)</p>	<p>Greystone Homes</p>	<p>23 units; condos; for-sale; affordable to lower income (80%)</p>	<p>Tentative Map approved by City Council. No anticipated date for construction of market rate or affordable housing units. Developer has requested permission to purchase credits in the La Terraza to satisfy requirement.</p>

PROJECT/LOCATION	DEVELOPER	DESCRIPTION	STATUS
<p><b>Poinsettia Shores</b> - no. of the Bati-quitos Lagoon, west of I-5, east of Carlsbad Blvd. (SW Quadrant)</p>	<p>Kaiza Poinsettia Corporation</p>	<p>Planning Area "D" is proposed site; 90 affordable units to be provided.</p>	<p>Council approved Master Plan on 1/4/94. On-site project approved by Planning Commission 2/15/95. Proposing an off-site satisfaction of the affordable housing requirement in the proposed Laurel Tree Project. Master Plan approved with option to go off-site with affordable housing.</p>
<p><b>Mariners Point</b> - East of Paseo Del Norte and north of Camino de las Ondas. (SW Quadrant)</p>	<p>Bramalea California Inc.</p>	<p>176 rental unit project to be affordable to lower income at 40%, 50% and 60% of median.</p>	<p>Tentative Map approved by City Council. No anticipated construction date. Proposing off-site satisfaction of the affordable housing requirement in the proposed Laurel Tree Project. Master Plan will need to be amended to allow for off-site provision of affordable housing.</p>
<p><b>Green Valley Master Plan</b> (SW Quadrant)</p>	<p>Carlsbad Partners, Ltd.</p>	<p>approx. 60 units required based on original plan.</p>	<p>Planning Commission approved project on 2/2/94. City Council considered project several times. Project pending a ballot initiative regarding the entire Green Valley Master Plan.</p>
<p><b>Poinsettia Hills</b> site is west of El Camino Real and south of Palomar Airport Road. (SW Quadrant)</p>	<p>Poinsettia Hill, Limited</p>	<p>24 units; for-sale condominiums; lower income</p>	<p>Approved by City Council. No anticipated construction date. Although developer proposed to construct units, the developer also has the option of only paying a fee for affordable housing due to the date their application was deemed complete.</p>
<p><b>Ocean Bluff</b> site is north of Poinsettia Lane and east of Alga Road; south of Palomar Airport Road (SW Quadrant)</p>	<p>Ocean Bluff Partners</p>	<p>16 units; 1, 2 &amp; 3 bedroom rental units (maybe for-sale); lower income (50-80% of median).</p>	<p>Application pending. Applicant working on details of project proposal. May request permission to purchase credits in La Terraza project to satisfy on-site requirement.</p>

