REFERRAL FORM

AFFORDABLE HOUSING INCENTIVE PROGRAM Shared Equity Project



This form applies to properties subject to zoning established in Chapter 1A of the Los Angeles Municipal Code (LAMC). For properties subject to zoning established in Chapter 1 of the LAMC, please use form <u>CP-4100</u>. For more information on a property's applied zoning, visit <u>zimas.lacity.org</u>

This form is to serve as a referral to the Los Angeles City Planning's Development Services Center (DSC) for Shared Equity Project cases filed under the Affordable Housing Incentive Program of LAMC Section 9.2.2. of Chapter 1A (in addition to the required City Planning Application and any other necessary documentation); and to the City of Los Angeles Housing Department (LAHD), Department of Building and Safety (LADBS), or other City agency for project status and entitlement need purposes. All Applicants are required to provide a complete set of architectural plans at the time that this form is submitted for review. Any application submitted that is missing any required materials will be considered incomplete and will not be reviewed until all materials are submitted.

This form shall be completed by the Applicant and reviewed and signed by City Planning DSC Affordable Housing Services Section (AHSS) Staff prior to filing an application for an entitlement or administrative review. Any modifications to the content(s) of this form after its authorization by AHSS Staff is prohibited. City Planning reserves the right to require an updated Referral Form for the project if more than 180 days have transpired since the referral date, or as necessary, to reflect project modifications, policy changes, bus route changes, bus schedule changes, and/or amendments to the Los Angeles Municipal Code (LAMC), local laws, and State laws.

If a project is only seeking base incentives and on-menu incentives, and no other discretionary approval, this form is not required and the project may proceed directly to the Department of Building and Safety to apply for a building permit, except for projects on sites with Surveyed Historic Resources.

Note: This Referral Form <u>does not</u> constitute a City Planning application. See the Forms webpage for City Planning Application (<u>CP13-7771.1</u>) and the City Planning Application Filing Instructions (<u>CP13-7810</u>). If the project is located within a Specific Plan or Overlay Zone, check with the assigned planner prior to preparing these plans, as some have additional or different requirements. An <u>Assignment List</u> can be found on the City Planning website at http://planning.lacity.org under the "About" tab, under "Staff Directory."

THIS SECTION TO BE COMPLETED BY AHSS STAFF ONLY

Planning Staff Name & Title:		
Planning Staff Signature:		
Referral Date:	Expiration Date:	
Case Number:		

Environmental Factors:	☐ In a Very High Fire Hazard Severity Zone
	☐ In The Coastal Zone
	☐ In a Sea Level Rise Area
Density District:	☐ Applied Density District (Part 6B) of N
	☐ Applied Density District (Part 6B) of 1L
Maximum Allowable Res	idential Density: ☐ Greater than 5 units ☐ Less than 5 units
Historic Resources:	□ Designated Historic Resource
	☐ Surveyed Historic Resource
	□ Non-Contributing Element
Eligibility Subarea:	☐ Within a ½ mile of a Major Transit Stop or a Low Vehicle Travel Area
	$\hfill\square$ In a Moderate, High, or Highest Resource TCAC Opportunity Area
	☐ Citywide (in neither of the above areas)
Ownership:	☐ The Ownership Documentation Checklist (CP-4101) with required documents attached has been submitted
Procedure Review:	 ☐ Ministerial Review: Department of Building and Safety ☐ Ministerial Review: Expanded Administrative Review ☐ Discretionary Review: Director's Determination (DIR) ☐ Discretionary Review: City Planning Commission Review (CPC)
Measure ULA:	☐ The project is funded by Measure ULA funding as verified by the Ownership Documentation Checklist (CP-4101)
Notes:	

THIS SECTION TO BE COMPLETED BY THE APPLICANT

APPLICANT REQUESTING:

Shared Equity Project (Per LAMC Ch. 1A Div. 14.3.)

Other project types under the Affordable Housing Incentive Program (LAMC Ch. 1A Sec. 9.2.2.) require a different <u>referral form</u>: One-Hundred Percent Affordable Housing Projects (CP-4097.A per LAMC Ch. 1A Div. 14.3.), Faith-Based Organization Projects (CP-4098.A per LAMC Ch. 1A Div. 14.3), Public Land Projects (CP-4099 per LAMC Ch. 1A Div. 14.3)

An Ownership Documentation Checklist (CP-4101) and associated documentation is included in application:

application:
□ Yes □ No
Other Programs and Streamlining Being Requested:
□ ED 1 ¹ $□$ Housing Element Site (ZI-2534 or ZI-2535) ² $□$ Type I Unified Adaptive Reuse ³
☐ Measure JJJ ☐ SB 35 ☐ Other (specify):
APPLICANT INFORMATION
Applicant Name:
Phone Number:
Email:
I. PROPOSED PROJECT
1. PROJECT LOCATION/ZONING
Project Address(es):
Assessor Parcel Number(s):
Community Plan:
Zone:
Land Use Designation:
Corresponding Zones:
Number of Parcels:

¹ Refer to <u>Executive Directive 1 Implementation Guidelines</u> for qualifying criteria. If the project is determined to be ineligible for ED 1, a new Referral Form will need to be obtained.

² Pursuant to LAMC Ch.1A Sec. 9.2.6., Housing Development Projects located on these sites that reserve at least 20 percent of the units for Lower Income Households shall be subject to Ministerial Approval.

³ See LAMC Ch. 1A Sec. 9.4.6. for additional requirements associated with a Type I Unified Adaptive Reuse Project.

Project Site Area (sf) ⁴ :
Other Site Regulations:
☐ Specific Plan ☐ DRB/CDO ☐ HPOZ ☐ Enterprise Zone
□ Redevelopment Project Area □ Designated Historic Resource
□ Non-Contributing Element □ CPIO □ Other
If applicable, specify:
Housing Element Inventory of Sites: ☐ Yes ☐ No
Other Pertinent Zoning Information (Including General Plan footnotes, etc; specify):
2. ELIGIBILITY
A Project is not eligible if located in a:
□ Very High Fire Hazard Severity Zone
□ Sea Level Rise Area
☐ The Coastal Zone
☐ Applied Density District (Part 6B) of N
☐ Applied Density District (Part 6B) of 1L
II. PROJECT INFORMATION
3. DESCRIPTION OF PROPOSED PROJECT (Specify Use(s), Height, Stories, Total

⁴ Applicant should use official survey site area, if survey is provided.

4. EXISTING USE

Describe Existing Development:

Existing Uses Dwelling Unit (DU) Square Footage (SF)	Existing No. of DUs or Non- Residential SF	Existing No. of DUs or Non-Residential SF to be Demolished	Proposed No. of DUs, Shared Housing Units (SHU) or Non- Residential SF ⁵
Guest Rooms / SHUs			
Studio			
One Bedroom			
Two Bedrooms			
Three Bedrooms			
Bedrooms			
Non-Residential SF			
Other			

B. Describe Previous Cases Filed:

Previous Cases	1	2	3
Case No(s).:			
Date Filed:			
Date Approved:			
End of Appeal Period:			
Environmental Case No.:			

⁵ Replacement units shall comply with LAMC Ch. 1A Sec. 4C.15. Request more information from the Los Angeles Housing Department.

5. APPLICATION TYPE
□ Check this box if the project is on a site with a surveyed historic resource . These projects require Expanded Administrative Review (LAMC Section 13B.3.2. of Chapter 1A) and in some cases a Director's Determination (LAMC 13B.2.5. of Chapter 1A). See Ch. 1A Sec. 9.2.2.C.1.h.iii.
A Project may request up to five Incentives on or not on the menu.
☐ On-Menu Incentives (specify):
1)
2)
3)
4)
5)
□ Not on Menu Incentives (specify):
1)
2)
3)
4)
5)
☐ Public Benefit Options (specify):
1)
2)
3)
4)
_,

☐ Waivers of Development Standards (specify):
1)
2)
3)
4)
5)
☐ Multiple Approvals (see non-comprehensive list below for reference):
☐ Zone/Height District Change per LAMC Section 13B.1.4. of Chapter 1A
☐ Conditional Use per LAMC Section 9.2.1.F.4. of Chapter 1A or LAMC Section 9.2.1.G. of Chapter 1A, as applicable
☐ Project Compliance per LAMC Sections 13B.4.2. and 13B.4.3. of Chapter 1A
☐ Community Design Overlay per or LAMC Section 8.2.5.D.4. of Chapter 1A
☐ Coastal Development Permit per LAMC Section 13B.9.2. of Chapter 1A
☐ Tract or Parcel Map per LAMC Section 13B.7.3. or 13B.7.5. of Ch.1A
6. ENVIRONMENTAL REVIEW
☐ Project is Exempt ⁶
□ Not Yet Filed
□ Filed (Case No.):
7. HOUSING DEVELOPMENT PROJECT TYPE
Check all that apply:
☐ For Sale ☐ For Rent ☐ Mixed-Use Project ☐ Residential Hotel ☐ Acutely Low Income
□ Extremely Low Income □ Very Low Income □ Low Income □ Moderate Income

⁶ Project may be exempt from CEQA review if it qualifies for a CEQA Exemption or is a Ministerial Project (aka, "By Right"). Refer to CP-4089 for The Housing Element CEQA Streamlining Checklist Form.

☐ Supportive Housin	g □ Chronically Homeless □	Senior			
☐ Special Needs (de	scribe):				
☐ Other Category (de	escribe):				
8. DENSITY CALC	CULATION (MAXIMUM ALL	OWABLE RESIDEN	NTIAL DEN	SITY) ^{7 8}	
Lot size (including an	y ½ of alleys)	SF (a)			
Density allowed by Zo (includes Qs and Ove		SF of	lot area per	DU (b)	
Land Use: Density al Most Permissive Cor	lowed by General Plan Land U responding Zone		lot area per	DU (c)	
Density allowed by S	pecific Plan	SF of	lot area per	DU (d)	
	Maximum Allowable Residential Densityunits per SF (e) (per highest density allowed of (b)(c)(d))				
9. BASE INCENT	VES				
Indicate the Base Inc	entives being requested by ch	ecking the respective	boxes in the	tables below.	
Base Incentives for P	Projects <u>not receiving</u> Measure	e ULA funding:			
Eligibility					
□ Citywide	The amount of additional units granted as a density bonus shall be equivalent to 80% of the number of units that were set aside for lower income households prior to the application of the density bonus	The minimum parking is .5 automobile parking stalls per dwelling unit.	Maximum of 1.5.	An increase of 11 feet or 1 story, whichever is greater.	

⁷ If there is a related subdivision case, the lot area shall be calculated based on the site area after a dedication of land has been provided.

⁸ As defined by Government Code Section 65915(o)(7), which states that "maximum allowable residential density" or "base density" means the maximum number of units allowed under the zoning ordinance, specific plan, or land use element of the general plan, or, if a range of density is permitted applicable to the project. If the density allowed under the zoning ordinance is inconsistent with the density allowed under the land use element of the general plan or specific plan, the greater shall prevail.

☐ Within a LowVehicle TravelArea or a halfmile of a MajorTransit Stop	Limited by Floor Area	No minimum residential parking is required.	Maximum of 2.0	An increase of 11 feet or 1 story, whichever is greater.
□ In a Moderate or Higher Opportunity Area	Limited by Floor Area	No minimum residential parking is required. Required parking for current or proposed nonresidential uses may be reduced by 25%.	Maximum of 2.5.	An increase of 11 feet or 1 story, whichever is greater.

Base Incentives for Projects **receiving** Measure ULA funding:

Eligibility Subarea	□ Density	□ Parking	FAR	Height
□ Citywide	The amount of additional units granted as a density bonus shall be equivalent to 80% of the number of units that were set aside for lower income households prior to the application of the density bonus.	parking stalls	☐ Sites with a Maximum Allowable Residential Density of less than 5 units: Maximum of 1.5.	☐ Sites with a Maximum Allowable Residential Density of less than 5 units: An increase of 11 feet or 1 story, whichever is greater.
			☐ Otherwise: Maximum of 3.0 or a 35% increase, whichever is greater.	☐ Otherwise: An increase of 22 feet or 2 stories, whichever is greater.

			T	
☐ Within a Low Vehicle Travel Area or a half mile of a Major Transit Stop	residential parking is required	☐ Sites with a Maximum Allowable Residential Density of less than 5 units: Maximum of 2.0	☐ Sites with a Maximum Allowable Residential Density of less than 5 units: An increase of 11 feet or 1 story, whichever is greater.	
			☐ Otherwise: Maximum of 4.5 or a 50% increase, whichever is greater	☐ Otherwise: An increase of 33 feet or 3 stories, whichever is greater
☐ Within a Moderate or Higher Opportunity Area	Limited by Floor Area	No minimum residential parking is required Required parking for current or proposed non-residential uses	☐ Sites with a Maximum Allowable Residential Density of less than 5 units: Maximum of 2.5	☐ Sites with a Maximum Allowable Residential Density of less than 5 units: An increase of 11 feet or 1 story, whichever is greater.
		may be reduced by 25%	☐ Otherwise: Maximum of 4.65, or a 55% increase, whichever is greater	☐ Otherwise: An increase of 33 feet or 3 stories, whichever is greater.
☐ Form District, Specific Plan, Special Zone, or Supplemental District FAR: If an applicable Specific Plan, Supplemental District, or Special Zone, or the applied Form District (Part 2B) allows a tier 1 bonus floor area ratio or tier 1 bonus height higher than what is granted in this program, qualifying projects may instead opt to use the tier 1 bonus floor area ratio or tier 1 bonus height FAR in lieu of the floor area ratio or height granted in the local base incentives.				
Tier 1 FAR:				

Tier 1 Height:_____

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on process for Measure ULA funding submitted funding not awarded, plans will need to
ble for the Affordable Housing Incentive
(f)
(g)
Parking Permitted with Incentives:
FAR Permitted with Incentives:
Height Permitted with Incentives:

Affordability Compliance:

Shared Equity Projects must provide minimum affordable units to meet State Density Bonus requirements. Complete Step 1 to ensure State Density Bonus requirements are met, and Steps 2-5 to ensure project specific affordability requirements are met.

Step 1	Step 2	Step 3	Step 4
Initial Affordability set	Overall Covenanted Unit	Maximum Allowed Units	Maximum Market
aside prior to	Requirement , Inclusive	Set Aside for Moderate	Rate Units
application of Density	of Units from Step 1	Income Households	
Bonus ⁹			
(HCD for rental units)	(HCD or TCAC for rental	(HCD or TCAC for	
	units)	rental units)	
Check applicable option			
☐ Option A: 15% Very			
Low Income):			
(Step 1)	(Step 2)		
f ¹⁰ *15%, rounded up	g*80%, rounded up	(Results of Step 2-	g* 20%, rounded up
		Results of Step 1)	
☐ Option B: 25% Low			
Income:			
(Step 1)	(Step 2)		
f*25%, rounded up		(Results of Step 2-	g* 20%, rounded up
	g*80%, rounded up	Results of Step 1)	

⁹ If (f) is greater than (g), use (g) for Step 1.

¹⁰ Variables are labelled in previous sections.

Step 1	Step 2	Step 3	Step 4
Initial Affordability set	Overall Covenanted Unit	Maximum Allowed Units	Maximum Market
aside prior to	Requirement , Inclusive	Set Aside for Moderate	Rate Units
application of Density Bonus ⁹	of Units from Step 1	Income Households	
(HCD for rental units)	(HCD or TCAC for rental	(HCD or TCAC for	
	units)	rental units)	
Check applicable option			
☐ Option C 45%			
Income (for sale only)			
(Step 1)	(Step 2)		
f*45%, rounded up	g*80%, rounded up	(Same as Step 2)	g* 20%, rounded up

Step 5: Specify Unit Breakdown Provided Per Each Income Category after the Application of the Density Bonus:

	Total	For Sale	For Rent	HCD	TCAC
Acutely Low Income (ALI)					
Extremely Low Income (ELI)					
Very Low Income (VLI)					
Low Income (LI)					
Moderate Income					
Market Rate					
Manager's Units ¹¹					
Other:					
TOTAL No. of Affordable Housing DUs(m)					
No. of Density Bonus Units:(n) If $g>f$, then $n=g-f$; if $f=g$, then $n=0$] ¹²					
Percent of Density Bonus Requested:(o) o = 100 x [(g/e) - 1] (round down)					

¹¹ Properties proposing 16 units or more need to provide a manager's unit per 25 CCR § 42.

¹² Variables are labelled in previous sections.

Percent of Affordable S [m/e, round down to a wh				(p)
□ Percent for PHP qual	ification ¹⁴ :			(c
[m/g, round down to a wh	ole number]			
□ Percent for Housing I [m/g, round down to a w		amlining ¹⁵ :		
<u> </u>		D. ¹⁶ For information on levels ners/ land-use-rent-income-sc		
		request an exemption from ar MC Section 10.1.10. of Chapte		ble roadway
☐ Yes ☐ No.				
10. ADDITIONAL IN	CENTIVES			
eligible for on-menu incer	ntives. A Proje	(On or Not On Menu). Note the ct requesting incentives not on Review (LAMC Section 13B.3.	n the Me	nu will be reviewed
standards permitted, and	the proposed	g requested. On the lines prod I standards with the use of the sted is on-menu, or exceeds s	incentive	e. Then, check the box
	Permitted	Proposed per Incentives	On-Mer	nu Not On Menu
☐ By-Right Adjustment				
(Relief from any		· - · · · · · · · · · · · · · · · · · ·		
standard otherwise		_		
granted per Sec. 13B.5.2	2,			
each counts as 1 incenti	ve			

¹³ Projects must remain affordable throughout the duration of the project and permit process.

¹⁴ Per ED 7, the housing development project must propose five or more units that contain at least 20% of all units as lower income restricted affordable housing units (Extremely Low Income, Very Low Income, or Low Income) or 40% of all units as Moderate Income restricted affordable housing units. 15 A project must reserve 20% of overall proposed units for Lower Income Households to be eligible for streamlining. This requirement can be satisfied by reserving the requisite number of units for Low, Very Low, Extremely Low, or Acutely Low Income Households, or a combination thereof.

¹⁶ All units including proposed or future proposed ADUs shall be subject to affordability requirements as determined by LAHD.

¹⁷ Projects in a Very High Fire Hazard Severity Zone, The Coastal Zone, a Hillside Area or subject to procedures in LAMC Section 13B.2.3 (Class Conditional Use Permit 3) are not eligible for this incentive

	Permitted	Proposed per Incentives	On-Menu	Not On Menu
□ Yard/Setback				
(Relief equivalent to by-	right adjustme	ent.		
All setbacks may be adju	isted with use	e of one incentive)		
☐ Front				
☐ Side (1)				
☐ Side (2)				
□ Rear				
☐ Alternative Frontage	(counts	as 2 incentives)		
☐ Multi-Unit 2 (MU	J2)			
☐ General 1 (G1)				
\square Averaging (all count a	s one incentiv	e – check all that are needed)	
□ FAR				
☐ Density				
□ Parking				
☐ Lot Amenity Spa	ace			
☐ District Boundary Hgh	t			
☐ Ground Floor Act.		_		
☐ Ground Story Height				
☐ Commercial Parking				
☐ Density Calculation		 		
□ Buildings/ Passages		···		
☐ Building Coverage				
☐ Lot Width				

Incentives for Projects with a Maximum Allowable Residential Density of under 5 Units Permitted Proposed per Incentives On-Menu | Not On Menu ☐ Lot Requirements Yard/Setback (All count as one incentive check all that are needed) □ Front П ☐ Side (1) \Box П ☐ Side (2) \Box П □ Rear □ Interior ☐ Alley Other Incentives Not on Menu (specify): TOTAL No. of Incentives Requested: On-Menu Off-Menu 11. **PUBLIC BENEFIT OPTIONS** Select Public Benefit Options that are being requested. A Project requesting Public Benefit Options will be reviewed pursuant to Expanded Administrative Review (LAMC Section 13B.3.2. of Chapter 1A). □ Projects only eligible for the Child Care and Land Donation Public Benefit Options. Check this box if the Project is located in: 1.) a Very High Fire Hazard Severity Zone

2.) the Coastal Zone

3.) a Sea Level Rise Area

Public Benefit Option	Permitted	Proposed per Base, On- Menu, or Off- Menu Incentives	Request w/ Public Benefit	Public Benefit Option (Check box if using)
Child Care Facility				
Multi-Bedroom Units				
Preservation of Trees				
Land Donation				
Active Ground Floor Exemption from Calculation of Floor Area				
Privately Owned Public Space				
Surveyed Historic Resource Facade Rehabilitation				
Other Public Benefit Opt	tions:			
Is the site mapped for and applicable CPIO or Specif		its Set (LAMC Sec. 9.0	3.4. of Ch. 1A) thr	ough an
☐ Yes ☐ No				
If yes, Specify which set	· ·			
Specify other Public Bene	fits provided by th	ne project.		
			equest with Publ	-

Public Benefit Name Permitte	d/Proposed per Incentives R	equest with Public Benefit Option		
Cumulative Increase with all utilized Public Benefit Options:				
12. WAIVERS				
	(LAMC Section 13B.2.5. of Cha	3B.3.2. of Chapter 1A), up to three apter 1A), and over three requires napter 1A)		
Indicate the Waivers being reque	sted.			
Waiver Request:	Permitted:	Proposed with Waiver:		
1				
2				
3				
4				
5				
Other:				
TOTAL No. of Waivers Reques	sted:			
13. PROJECT OUTCOMES				
Density, FAR, Height, and Park	ing allowed on site with base	zoning:		
Density, FAR, Height, and Park Waivers:	ing permitted with Incentives,	Public Benefit Options, and		

14. COVENANT

All Affordable Housing Incentive Program projects are required to prepare and record an Affordability Covenant to the satisfaction of the LAHD's Occupancy Monitoring Unit before a building permit can be issued. For more information, please contact the LAHD at lahd-landuse@lacity.org. Certain Public Benefit Options (Section 11) require covenants recorded with LA County and submitted to City Planning.

15. REPLACEMENT UNITS

Applicants must obtain a Replacement Unit Determination from LAHD pursuant to LAMC Sec. 4C.15. of Ch. 1A.

Disclaimer: This review is based on the information and plans provided by the applicant at the time of submittal of this form. Applicants are advised to verify any zoning issues such as height, parking, setback, and any other applicable zoning requirements with LADBS.