REFERRAL FORM

AFFORDABLE HOUSING INCENTIVE PROGRAM Shared Equity Project



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

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 12.22 Section A.39 of Chapter 1 (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:	ental Factors: In a Very High Fire Hazard Severity Zone			
	☐ In The Coastal Zone			
	☐ In a Sea Level Rise Area			
Zone:	☐ Located in a manufacturing zone that does not allow multiple family residential uses (M1, M2, M3), including sites zoned CM, MR1, and MR2 with no residential uses permitted from an applicable planning overlay.			
	\square In a Single-family zone (RW and more restrictive)			
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			
	\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 12.22 Section A.39 of Chapter 1)

Other project types under the Affordable Housing Incentive Program (LAMC Section 12.22 A.39 of Chapter 1) require a different <u>referral form</u>: One-Hundred Percent Affordable Housing Projects (CP-4097 per LAMC Section 12.03 of Chapter 1), Faith-Based Organization Projects (CP-4098 per LAMC Section 12.22 A.39(b) of Chapter 1), Public Land Projects (CP-4099 per LAMC Section 12.22.A.39(b) of Chapter 1)

An Ownership Documentation Checklist (CP-4101) and associated documentation is included in application: ☐ Yes □ No Other Programs and Streamlining Being Requested: ☐ ED 1¹ ☐ Housing Element Site (ZI-2534 or ZI-2535)² ☐ Type I Unified Adaptive Reuse³ ☐ 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:

¹ Refer to Executive Directive 1 Implementation Guidelines 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.1 Section 16.70 E. of Chapter 1, 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 12.22 Section A.26(h)(1) of Chapter 1 for additional requirements associated with a Type I Unified Adaptive Reuse Project.

Number of Parcels:				
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				
□ Q Condition/D Limitation (Ordinance No. and provide a copy):				
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				
☐ Manufacturing zone that does not allow multiple family residential uses (M1, M2, M3), including sites zoned CM, MR1, MR2 with no residential uses permitted from an applicable planning Overlay				
☐ A single-family zone (RW and more restrictive)				
Surveyed Historic Resource ⁵				
□ 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 LAMC Section 12.22 A.39(c)(7) of Chapter 1.				

 ⁴ Applicant should use official survey site area, if survey is provided.
 ⁵ See 'HistoricPlacesLA' under 'Planning and Zoning tab of ZIMAS

II. PROJECT INFORMATION

3. DESCRIPTION OF PROPOSED PROJECT (Specify Use(s), Height, Stories, Total Units, and Floor Area)

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 ⁶
Guest Rooms / SHUs			
Studio			
One Bedroom			
Two Bedrooms			
Three Bedrooms			
Bedrooms			
Non-Residential SF			
Other			

⁶ Replacement units shall comply with LAMC Sections 16.60 & 16.61. Request more information from the Los Angeles Housing Department.

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. APPLICATION TYPE

Indicate requested incentives (On or Not on Menu), Public Benefit Options, Waivers of Development Standards and Multiple Approvals as applicable in the corresponding sections below. 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)
5)
☐ 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 12.32 of Chapter 1
☐ Conditional Use per LAMC Section 12.24 U.26 of Chapter 1
\square Project Compliance per LAMC Sections 13B.4.2. and 13B.4.3. of Chapter 1A
☐ Community Design Overlay per LAMC Section 13.08 of Chapter 1
☐ Coastal Development Permit per LAMC Sections 13B.9.1. or 13B.9.2. of Chapter 1
☐ Tract or Parcel Map per LAMC Sections 13B.7.3. or 13B.7.5. of Ch.1A

6. ENVIRONMENTAL REVIEW	
☐ Project is Exempt ⁷	
□ Not Yet Filed	
☐ Filed (Case No.):	
7. HOUSING DEVELOPMENT PROJECT TYPE	
Check all that apply:	
☐ For Sale ☐ For Rent ☐ Mixed-Use Project ☐ Reside	ntial Hotel □ Acutely Low Income
☐ Extremely Low Income ☐ Very Low Income ☐ Low I	ncome Moderate Income
☐ Supportive Housing ☐ Chronically Homeless ☐ Seni	or
☐ Special Needs (describe):	
☐ Other Category (describe):	
8. DENSITY CALCULATION (MAXIMUM ALLOWA	ABLE RESIDENTIAL DENSITY) 8 9
Lot size (including any ½ of alleys)	SF (a)
Density allowed by Zone (includes Qs and Overlays)	SF of lot area per DU (b)
Land Use: Density allowed by General Plan Land Use Most Permissive Corresponding Zone	SF of lot area per DU (c)
Density allowed by Specific Plan	SF of lot area per DU (d)
Maximum Allowable Residential Density (per highest density allowed of (b)(c)(d))	units per SF (e)

⁷ 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.

⁸ 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.

⁹ 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.

□ <u>Land zoned for Parking (P):</u> Land zoned for Parking may use the standards of the most permissive adjacent lot to establish maximum allowable residential density. See LAMC Section 12.22 A.39(e)(2) of Chapter 1 for more detail.
APN/Address of adjacent lot:
Zone of adjacent lot:

9. BASE INCENTIVES

Indicate the Base Incentives being requested by checking the respective boxes in the tables below.

Base Incentives for Projects **not receiving** Measure ULA funding:

Eligibility Subarea	□ Density	□ Density □ Parking □ FAR		□ Height	
□ Citywide	Citywide 80% of the number of units set aside for Lower Income Households (CGS 65915(f)(3)(D)(i))		The maximum FAR shall be equal to 1.5:1.	Bonus of up to 11' or 1 story, whichever is greater	
☐ Within a LowVehicle TravelArea or a half mileof a Major TransitStop	Limited by Floor Area	No minimum parking required.	The maximum FAR shall be equal to 2.0:1.	Bonus of up to 11' or 1 story, whichever is greater	
Opportunity Area Parking require for current or proposed non- residential uses		parking required. Parking required for current or proposed non- residential uses may be reduced	The maximum FAR shall be equal to 2.5:1.	Bonus of up to 11' or 1 story, whichever is greater	

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

Eligibility Subarea	□ Density	□ Parking	FAR	Height
□ Citywide	80% of the number of units set aside for Lower Income Households (CGS 65915(f)(3)(D)(i))	Unit '	☐ Sites with a Maximum Allowable Residential Density of less than 5 units: The maximum FAR shall be equal to 1.5:1.	☐ Sites with a Maximum Allowable Residential Density of less than 5 units: Bonus of up to 11' or 1 story, whichever is greater
			☐ Otherwise, the maximum FAR shall be: 3.0:1, or a 35% increase, whichever is greater.	☐ Otherwise, a maximum bonus of 22' or 2 stories, whichever is greater.
□ Within a Low Vehicle Travel Area or a half mile of a Major Transit Stop	Limited by Floor Area	No minimum parking required	☐ Sites with a Maximum Allowable Residential Density of less than 5 units: The maximum FAR shall be equal to 2.0:1.	☐ Sites with a Maximum Allowable Residential Density of less than 5 units: Bonus of up to 11' or 1 story, whichever is greater.
			☐ Otherwise, the maximum FAR shall be: 4.5:1, or a 50% increase, whichever is greater.	☐ Otherwise, a maximum bonus of 33' or 3 stories, whichever is greater.

□ Within a Moderate or Higher Opportunity Area	Limited by Floor Area	No minimum parking required. Parking required for current or proposed nonresidential uses may be reduced by 25%.	☐ Sites with a Maximum Allowable Residential Density of less than 5 units: The maximum FAR shall be equal to 2.5:1	☐ Sites with a Maximum Allowable Residential Density of less than 5 units: Bonus of up to 11' or 1 story, whichever is greater.		
			☐ Otherwise, the maximum FAR shall be: 4.65:1, or a 55% increase, whichever is greater.	☐ Otherwise, a maximum bonus o 33' or 3 stories, whichever is greater.		
a development bon	☐ <u>Specific Plan or Overlay FAR</u> : In a Specific Plan or Overlay district that has FAR available through a development bonus or incentive program to provide affordable housing, a Project may utilize the Bonus FAR of the Specific Plan or Overlay district in lieu of the FAR maximum described below.					
		FAR:		· · · · · · · · · · · · · · · · · · ·		
	g (P): Land zoned for F r to accessing base inc					
	APN/Address of Adjac	cent Lot:				
	Zone of Adjacent Lot:					
☐ Measure ULA: Confirmed recipient or in application process for Measure ULA funding submitted as attached documentation with CP-4101. Note that if funding not awarded, plans will need to conform to lower density incentives.						
Projects must propose 5 or more units to be eligible for the Affordable Housing Incentive Program						
Number of units prior to Density:(f)						
Units Proposed with Density Bonus:(g)						
Parking Permitted	w/o Incentives:	Parki	ng Permitted with I	ncentives:		
FAR Permitted w/o Incentives:		FAR	Permitted with Ince	ntives:		
Height Permitted w/o Incentives:		Heial	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 Bonus ¹⁰	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 A: 15% Very			
Low Income):			
(Step 1)	(Step 2)		
f ¹¹ *15%, rounded up	g*80%, rounded up	(Results of Step 2- Results of Step 1)	g* 20%, rounded up
☐ 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)	
☐ Option C 45%			
Income (for sale only)	(Step 2)		
(Step 1)	(Otep 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)					

¹⁰ If (f) is greater than (g), use (g) for Step 1.

¹¹ Variables are labelled in previous sections.

	Total	For Sale	For Rent	HCD	TCAC
Low Income (LI)					
Moderate Income					
Market Rate					
Manager's Units ¹²					
Other:					
TOTAL No. of Affordable Housing D	Us				(m)
No. of Density Bonus Units: If g>f, then n=g-f; if f=g, then n= 0] ¹³					(n)
Percent of Density Bonus Requeste o = 100 x [(g/e) - 1] (round down)	d:				(o)
Percent of Affordable Set Aside ¹⁴ : [m/e, round down to a whole number]					(p)
□ Percent for PHP qualification ¹⁵ : [m/g, round down to a whole number]					(q)
□ Percent for Housing Element Stre [m/g, round down to a whole number]	eamlining ¹⁶ :				
Note: Verify Rent Schedules with LAH LAHD at https://housing.lacity.org/part				• •	e contact
Roadway Widening Does the project widening requirements pursuant to LA	•	•		able roadwa	у
☐ Yes ☐ No.					

¹⁴ Projects must remain affordable throughout the duration of the project and permit process.

¹² Properties proposing 16 units or more need to provide a manager's unit per 25 CCR § 42.

¹³ Variables are labelled in previous sections.

¹⁵ 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.

16 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.

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

¹⁸ 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

10. ADDITIONAL INCENTIVES

Select up to 5 Additional Incentives (On or Not On Menu). Note that certain projects are not eligible for on-menu incentives. A Project requesting incentives not on the Menu will be reviewed pursuant to Expanded Administrative Review (LAMC Section 13B.3.2. of Chapter 1A).

Check the box for the incentive(s) being requested. On the lines provided, indicate the current standards permitted, and the proposed standards with the use of the incentive. Then, check the box to indicate if the incentive being requested is on-menu, or exceeds standards of the menu/ is not on the menu of incentives.

Permitted Proposed per Incentives On-Menu | Not On Menu ☐ Yard/Setback (All count as one incentive check all that are needed) □ Front П П ☐ Side (1) П П ☐ Side (2) П \Box □ Rear ☐ Transitional Height П \Box ☐ Ground Floor Act. ☐ Ground Floor Hght. П П □ Commercial Parking П П □ Buildings/ Passages П П □ Lot Coverage ☐ Lot Width \Box ☐ Open Space П ☐ Density Calculation П ☐ Averaging (all count as one incentive – check all that are needed) \Box FAR \Box □ Density \Box □ Parking П \Box

Perr	nitted	Proposed per Incentives	On-Menu	Not On Menu
□ Open Space				
□ Vehicular Access				
□ Relief from a Standard				
(Can be requested				
up to 5 times, each request				
				
Incentives for Projects with a M	aximun	n Allowable Residential Dens	sity of unde	5 Units
Perr	nitted	Proposed per Incentives	On-Menu	Not On Menu
☐ Lot Requirements				
□ Yard/Setback				
(All count as one incentive –				
check all that are needed)				
☐ Front				
□ Side (1)				
☐ Side (2)				
□ Rear				
□ Interior		_		
□ Alley		- 		
☐ Buildings and Passages				
Other Incentives Not on Menu (s	pecify)	:		
TOTAL No. of Incentives Requ	ested:	On-Menu Off-Menu		

11. PUBLIC BENEFIT OPTIONS

A Project requesting Public Benefit Options will be reviewed pursuant to Expanded Administrative Review (LAMC Section 13B.3.2. of Chapter 1A).

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				

12. WAIVERS

Up to one for Expanded Administrative Review (LAMC Section 13B.3.2. of Chapter 1A), up to three requires Director's Determination (LAMC Section 13B.2.5. of Chapter 1A), and over three requires City Planning Commission Review (LAMC Section 13B.2.3. of Chapter 1A)

Indicate the Waivers being requested.

	Waiver Request:	Permitted:	Proposed with Waiver:
1.			

·	
·	
·	
Other:	
TOTAL No. of Waivers Requested:	
3. PROJECT OUTCOMES	
ensity, FAR, Height, and Parking allowed on site with base zoning:	
Density, FAR, Height, and Parking permitted with Incentives, Public Benefit Options, and Vaivers:	

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 Section 16.61.

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.