

SANTA CLARA ADU GUIDEBOOK EXERCISES

These exercises and the accompanying Guidebook mentioned here are available online at aduscc.org/guidebook, along with other resources, guidance, and tools.

CONTENTS

- Identifying Goals & Concerns
- Recording Your ADU Goals
- Making a Rough Sketch of Your Property
- Property Details Worksheet
- Planning Staff Meeting Worksheet
- Budgeting Exercise
- Initial Design Exercise
- Design Ideas Exercise
- Designer Considerations Exercise
- Identifying What You Want in a Lease



IDENTIFYING GOALS & CONCERNS

Goals	Short-term	Long-term	Concerns	Short-term	Long-term
Rental income	<input type="checkbox"/>	<input type="checkbox"/>	Cost	<input type="checkbox"/>	<input type="checkbox"/>
Housing for a family member	<input type="checkbox"/>	<input type="checkbox"/>	Hiring/managing contractors	<input type="checkbox"/>	<input type="checkbox"/>
Helping out the community (e.g., housing a teacher)	<input type="checkbox"/>	<input type="checkbox"/>	Privacy	<input type="checkbox"/>	<input type="checkbox"/>
Housing for someone with special needs	<input type="checkbox"/>	<input type="checkbox"/>	Site constraints	<input type="checkbox"/>	<input type="checkbox"/>
Planning for retirement	<input type="checkbox"/>	<input type="checkbox"/>	Challenges of renting and managing the ADU	<input type="checkbox"/>	<input type="checkbox"/>
Increased resale value	<input type="checkbox"/>	<input type="checkbox"/>	Conflict with neighbors	<input type="checkbox"/>	<input type="checkbox"/>
Downsizing/moving into the ADU	<input type="checkbox"/>	<input type="checkbox"/>	Getting approval/scrutiny from government	<input type="checkbox"/>	<input type="checkbox"/>
Housing domestic help (e.g., an au pair)	<input type="checkbox"/>	<input type="checkbox"/>			
Help with chores or to watch over things when you are away	<input type="checkbox"/>	<input type="checkbox"/>			
Housing an in-home caregiver	<input type="checkbox"/>	<input type="checkbox"/>			



RECORDING YOUR ADU GOALS

To stay motivated through challenges in the process, some people find it helpful to write down what building their ADU will allow them to do. Use this space to express your goals – consider cutting it out and putting it somewhere you'll see it regularly. Examples: "Take the kids to Disneyland every year." "Make sure my mom has a safe place to live."

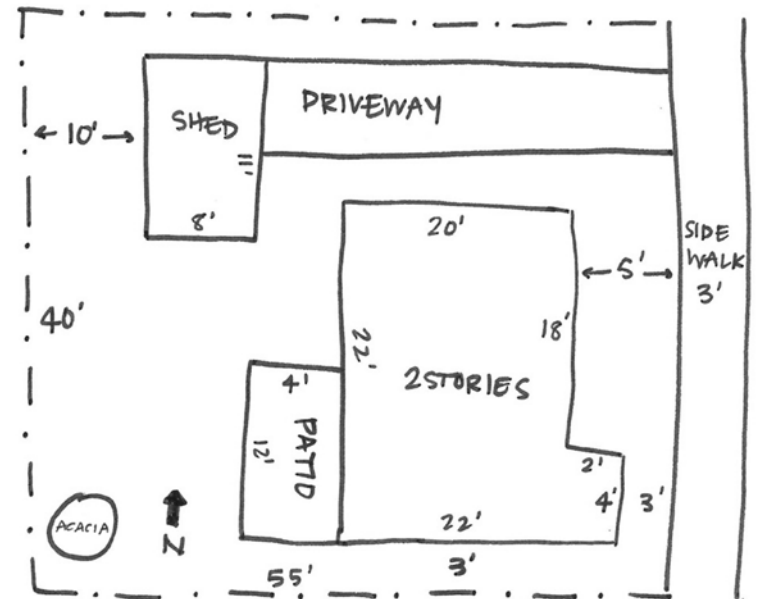


MAKING A ROUGH SKETCH OF YOUR PROPERTY

Drawing a site plan is an essential step, both for your own planning and to get permit approvals. A site plan shows your property line and key information such as buildings, setbacks, lot line, etc. Most homeowners hire a professional to produce the final version, but it is often helpful to have a rough sketch to start. At this stage, you are going to draw major elements like building footprints, driveways, trees, etc.

- 1. Start by sketching out your property lines**, measuring and marking them accordingly. (You can use fences to estimate property lines, but at some point you may need to get a professional surveyor on-site.) Add any existing structures. Focus on the basic shape. You don't need to worry about inside floor plans, you just need to capture the footprint and whether it is one or two stories. Note special features like porches, trellises, and exterior stairways.
- 2. Next, add in the driveway.** Be sure to measure the length and width of the driveway. Pay attention to other significant features like pools, trees, steep slopes, etc. When you are done, you will have something that looks like the sketch to the right.
- 3. Now, try doing a drawing to scale.** Depending on your lot size, a good scale might be one inch equals ten feet. If possible, try to have your north arrow direction pointing upwards on the page. Besides drawing the lines, be sure to make notes about the exact length as well. Be sure to use a pencil.
- 4. Make a copy.** You'll want to copy your site plan or take a photo with your phone, because you will probably end up drawing on it several times as you explore ideas.

Example:



Eventually, the site plan needs to be drawn to scale, but to start you should use scratch paper.

If the site plan is feeling too stressful, you can skip it for now or go outside and do a really rough sketch on a napkin. It's better to meet with local Planning staff earlier than to get everything right.

Note: Each 4x4 square on the following page equals 1."



PROPERTY DETAILS WORKSHEET

One of the first steps will be to gather important information about your property. Use the instructions below and see Learning the Rules in our Handbook for more details.

Assessor's Parcel Number (APN) Listed on your property tax bill or the County Assessor's Property Search Tool*

Lot size in square feet – find on your APN report or deed

Size of the primary residence You may know this or have it on a previous real estate listing

Special zones Is your property in a Historic District, Fire Hazard Zone, Homeowner's Association, Utility District, etc.

DEVELOPMENT STANDARDS FOR YOUR PROPERTY

These rules dictate where and how much you can build on your property based on your zone. **It can feel empowering to know this, but you don't have to** – your design team and local Planning staff can confirm.

Neighborhood Zone:

Setbacks: Front, sides, and rear

Maximum height:

Other relevant development standards (lot coverage, floor area ratio, etc. – these will differ in each set of local zoning rules):

* sccassessor.org/index.php/online-services/property-search/real-property



STAFF MEETING WORKSHEET

One of the best things you can do is to talk to local staff early in the process. You can find contact info in the Guidebook Directory or on the Contact Page*. Many of these questions are addressed in the ADU Guidebook,** but you can take this opportunity to clarify anything unique to your property.

1. **Do you have official record of my existing floor area? What areas should I count when determining existing size?**
2. **What are the setbacks, height, and site coverage or floor area limits for my property? Are there other development standards for my property that I should know about?**
3. **Does my property fall in any special zones that may impact what I can build? (Historic Districts, Fire Hazard Zone, etc.)**
4. **Will I need to add parking? Does my home meet parking requirements?**
5. **Do you require approval from my Homeowners Association?**
6. **Are there fire safety or sprinkler regulations I should know?**

* aduscc.org/contact ** aduscc.org/guidebook

7. What potential problems do you see with my property or project plans and how can I address these?
8. When should I start talking to utility companies about requirements?
9. How long does permitting take? When should I check in if I haven't heard anything? How do I do that?
10. Can you explain all the fees I'll be expected to pay as part of permitting?
11. Are there common pitfalls or mistakes to watch out for in the design, application, or construction process?
12. Is a deed restriction required? When do I do that?
13. Are there restrictions on how I can use my ADU?
14. Can you summarize any other rules that are important?



BUDGETING EXERCISE

These questions will help you think through and get started with financial planning for your ADU. See the Guidebook section Budgeting & Finance for more information.

- 1. What are your estimated construction costs?** Use the Santa Clara County ADU calculator.*
- 2. How are you planning to finance your ADU?**
- 3. How much cash, savings or other liquid assets can you put into the project?**
- 4. Do you have any friends and/or family that you may be able to ask for a loan?**
- 5. How much equity (the portion of your home's value you own outright) do you have in my home?** market value of home – remaining mortgage balance = equity
- 6. Do you want to consider applying for a loan from a lender?**

* aduscc.org/calculator

7. Will your income support a loan?

8. Do you expect to qualify for a loan?

9. Do you prefer a bank, credit union, or mortgage broker?

10. What banks, credit unions and/or mortgage brokers do you want to reach out to? Make sure to include your current lender.

11. Which loan(s) best suit your situation?

12. What do you expect to rent my ADU for? This will be a source of loan repayment. Estimate projected rent with the Santa Clara County ADU Calculator.*

13. If a family member or friend is going to live there, can they contribute by paying rent?

14. Is your priority to maximize income or to help meet the housing needs of the community?

15. What other financial considerations do you have and/or what ideas do you want to explore?



INITIAL DESIGN EXERCISE

Here are some notes and questions to get you started on the design process. Remember, all of these might change when you start discussing costs. Review the goals you identified in previous exercise(s) to ensure they are still appropriate. See the Guidebook Design section for more information.

- 1. What type of ADU do you want?** e.g., detached, conversion, etc. See ADU 101 in the Guidebook.
- 2. If you belong to a Homeowners Association, do they have design guidelines you'll need to follow?**
- 3. Do you want a modern or traditional feel?**
- 4. What are some houses that you like and why?**
- 5. Are there floor plans you like/don't like? What features stand out?** See our Floorplans Gallery* for examples.
- 6. Are there features in your current home or past homes that you loved or felt could be improved that can help inspire your ADU?**
- 7. How many bedrooms do you want? How many bathrooms do you want, and do you want them larger or smaller?**
- 8. Do you want more communal space (living room) or larger bedrooms?**

9. What kind of kitchen do you want (chef's kitchen or something less expensive)?

10. Will there be a washer and dryer in the unit?

11. Do you want features that will help people stay in the home as they age or that account for special needs? e.g., level entry, accessible bathrooms, grab bars, no stairs, etc.

12. Do you want additional green or sustainable features?

13. Are there landscaping plans you would like to incorporate?

14. Do you have preferences about the flow of the house? Such as: entrance should be here, a door to the garden, etc.

15. How should you situate your ADU on your property? Think about natural light, access to utilities, and privacy (for both the primary residence and the neighbors).

16. Do you want to create outdoor space adjacent to the ADU? Are there trees or features to protect?



DESIGN IDEAS EXERCISE

Write down your initial thoughts here.
When it's time to make decisions about these elements, pull this out.

Flooring

Lighting

Siding

Fixtures



DESIGNER CONSIDERATION EXERCISE

Before you start looking for a designer, consider what you're want. See the Guidebook's Design section for more information on choosing a designer.

Adapted from the American Institute of Architects

1. **Would you rather work with a licensed architect, who has more training, or a designer, who will likely be less expensive?**
2. **Do you want to use modular/prefab construction (unit is partially built off-site)?**
3. **Do you want to use a design/build firm to handle drawings and construction?**
4. **How client-centered do you want your designer to be? Homeowners may be actively involved or hands-off; designers may welcome interaction or hate it.**
5. **Do you prefer to work with a larger firm or a smaller firm?** Both have pros and cons. In the end it comes down to your personal preference.
6. **Do you want your designer to just prepare drawings, or do you want them also to help with permitting, construction drawings, and/or the construction phase?**



IDENTIFYING WHAT YOU WANT IN A LEASE

Use this space for decisions about your lease terms. See the Guidebook bonus section on Move-In for more info.

1. **What is the rent?**
2. **When is rent due and how will it be paid?**
3. **What is the security deposit?***
4. **Is your lease fixed-term or month-to-month?**
5. **At the end of the rental period, does the lease terminate or turn into a month-to-month rental?**
6. **Does the unit include parking?**
7. **Do you allow pets? If so, what type? How many? Size restrictions? Will you ask for a pet deposit?**
8. **Does the rent include utilities such as water, electrical, trash, and/or gas?**
9. **Do you allow tobacco or cannabis use?**
10. **Do tenants have access to any shared spaces (yard, storage, etc.) and, if so, what are the terms?**
11. **Are you limiting the number of tenants?***
12. **Is there anything else will you include in your lease?**

* As of September 2019, California law says you may charge up to two months' rent or three months' rent if the unit is furnished.

** Landlords can generally limit the number of tenants and state law has found the two-plus-one formula (two people per bedroom plus one person) as reasonable but subject to rebuttal based on local factors like size of the bedrooms, configuration of the residence, age of the children, and local laws.