

HUMBOLDT ADU GUIDEBOOK EXERCISES

These interactive exercises are also available online at humboldtadu.org/exercises, along with other resources, guidance, and technical tools. The accompanying guidebook referenced here is available at humboldtadu.org/guidebook.

Contents

- Identifying Goals & Concerns
- Keeping Your Eyes on the Prize
- Documenting Property Information
- Making a Property Rough Sketch
- Planner Meeting Worksheet
- Budgeting Exercise
- Initial Design Exercise
- Design Ideas Exercise
- Designer Considerations Exercise
- Permit Application Planning and Organization
- Identifying What You Want in a Lease



Identifying Goals & Concerns

Before you begin your ADU project, it can be helpful to think about both your short- and long-term goals. One of the benefits of an ADU is that it can respond to your changing needs over time. At first, it might be rented for income, then it might turn into a children's playroom, and eventually it might house aging parents or yourself.

It is also important to think about your concerns. Creating a list of concerns early in the process can help make sure they are addressed sufficiently. Ways to address these concerns are included in the guidebook.

Goals	Short-term	Long-term
Rental income	<input type="checkbox"/>	<input type="checkbox"/>
Housing for a family member	<input type="checkbox"/>	<input type="checkbox"/>
Helping out the community (e.g., housing a teacher)	<input type="checkbox"/>	<input type="checkbox"/>
Housing for someone with special needs	<input type="checkbox"/>	<input type="checkbox"/>
Planning for retirement	<input type="checkbox"/>	<input type="checkbox"/>
Increased resale value	<input type="checkbox"/>	<input type="checkbox"/>
Downsizing/moving into the ADU	<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"/>

Concerns	Short-term	Long-term
Cost	<input type="checkbox"/>	<input type="checkbox"/>
Hiring/managing contractors	<input type="checkbox"/>	<input type="checkbox"/>
Privacy	<input type="checkbox"/>	<input type="checkbox"/>
Site constraints	<input type="checkbox"/>	<input type="checkbox"/>
Challenges of renting and managing the ADU	<input type="checkbox"/>	<input type="checkbox"/>
Conflict with neighbors	<input type="checkbox"/>	<input type="checkbox"/>
Getting approval/scrutiny from government	<input type="checkbox"/>	<input type="checkbox"/>



Keeping Your Eyes on the Prize

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."



Documenting Property Information

One of the first steps will be to gather important information about your property. The easiest and most accurate way to do this is by contacting the county – using the instructions and details in **Section One: Getting Started**, record the information below.

Assessor's Parcel Number (APN):

My lot size:

My lot coverage:

My zone's maximum permitted lot coverage:

May be required if ADU is more than 800ft²

Other information:

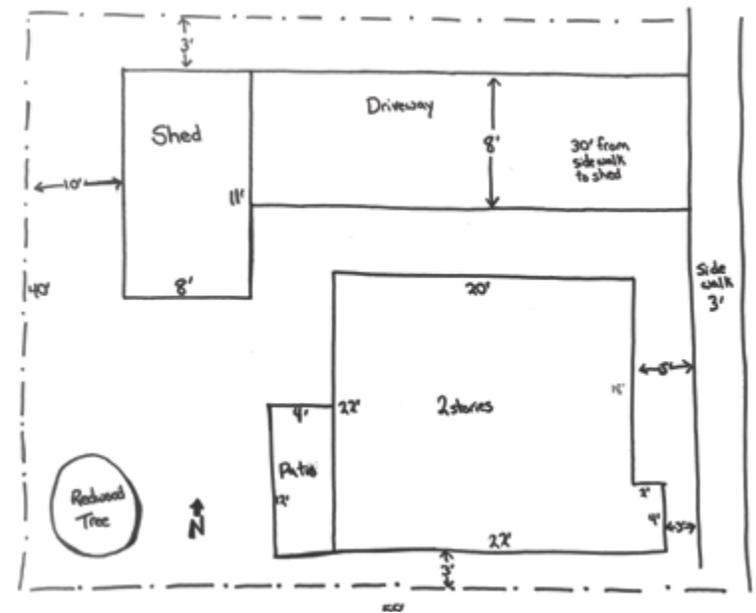


Making a Property Rough Sketch

Drawing a site plan is an essential step, both for your own planning and to get county 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 trees, drainage ways, steep slopes, any easements, 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 the county earlier than to get everything right.

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



Planner Meeting Worksheet

One of the best things you can do is to talk to planning department staff early in the process about potential issues. The county has a planning and zoning counter where you can ask questions without an appointment.

- 1. Am I allowed to build an ADU on my property and, if so, what can I build?**
- 2. Does the county have information on my lot coverage?**
- 3. Does the county have an estimate of my current floor area?**
- 4. How do I know if my garage was built legally? *If converting an existing garage or accessory building***
- 5. Will I need to add parking? Does my existing home meet parking requirements? Do state parking exemptions apply to my situation?**
- 6. Are there fire safety or fire sprinkler regulations I should know?**
- 7. Are there water or sewer districts, coastal zone, flood zone or other site circumstances I should be aware of for my property?**
- 8. Can you summarize any rules that are important?**

CONTINUED

9. What is the Alternative Owner Builder Program, and is it right for me?
10. Can you explain the ADU approval process?
11. How long does it usually take to obtain approval, and how many times to applicants typically need to resubmit plans?
12. Are there common pitfalls or mistakes to watch out for in the design, application, or construction process?
13. How much are the fees and what are all the fees to expect?
14. What are the other departments and agencies I can expect to either interact with or pay fees to?
15. When should I start talking to utility companies about requirements? Do you have direct contacts?
16. If I want to build an ADU of more than 750 sq ft, what additional fees to I pay and who do I contact?
17. Are there restrictions on how I can use my ADU?
18. Will I need a special permit for any of the following: *outside Fire Protection District, parcel created since 2019 near the airport, mapped area of liquefaction or landslide, mapped 100-year flood area, mapped tsunami area, near toxic cleanup site, ADU over 1,200 square feet.*



Budgeting Exercise

These questions will help you think through and get started with financial planning for your ADU.
See **Section Two: Budgeting & Finance** for more information.

- 1. What are my estimated construction costs?** *Use the ADU calculator at calculator.humboldtadu.org.*
- 2. How am I planning to finance the project?**
- 3. How much cash, savings or other liquid assets can I 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 I have in my home?**
market value of home – remaining mortgage balance = equity
- 6. Do I want to consider applying for a loan from a lender?**

CONTINUED

7. **Will my income support a loan?**
8. **Do I expect to qualify for a loan?**
9. **Do I prefer a bank, credit union, or mortgage broker?**
10. **What banks, credit unions and/or mortgage brokers do I want to reach out to?** *Make sure to include your current lender.*
11. **Which loan(s) best suit my situation?** *The ADU calculator at calculator.humboldtadu.org can estimate.*
12. **What do I expect to rent my ADU for?** *This will be a source of loan repayment and should be considered early in the process. Estimate your projected rent at calculator.humboldtadu.org.*
13. **If a family member or friend is going to live there, can they contribute by paying rent?**
14. **Is my priority to maximize income or to help meet the housing needs of the community?**
15. **What other financial considerations do I have and/or what ideas do I 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 **Section Three: Design** for more information.

- 1. What type of ADU do you want?** *e.g., freestanding, garage conversion, etc. See Section One: Getting Started for ADU types.*
- 2. Do you want a modern or a traditional feel?** *Many people feel an ADU will look best if it matches the main home.*
- 3. What are some houses that you like and why?**
- 4. Are there floor plans you like or don't like? What features stand out?**
- 5. Are there features in your current home or past homes that you loved or felt could be improved that can help inspire your ADU?**
- 6. How many bedrooms do you want?**
- 7. 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?**

CONTINUED

- 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, 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? *e.g., the entrance should be here, there should be 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 issues. Consider the privacy of both the primary residence and neighbors.***
- 16. Are there features in your current home or past homes that you loved or felt could be improved that can help inspire your ADU?**
- 17. 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 begin speaking with potential designers, it's important to consider what you're looking for. See **Section Three: Design** 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 is likely to be less expensive?**
- 2. Do you want to use modular/prefab construction (unit is at least partially built off-site)?**
- 3. Do you want to use a design/build firm to handle both drawings and construction?**
- 4. How client-centered do you want your designer to be?** *Some architects welcome interactions with their clients and some dread it. Some homeowners want to be actively involved and some are more hands-off.*
- 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?**



Permit Application Planning and Organization

Use this space to collect and organize information on the permit application you will submit.
See **Section Four: Permits** for more information.

- 1. What are all the steps of the permitting and approvals process?**
 - 2. How long does each step in the process take? At what point should I check in if I haven't heard anything? How do I do that?**
 - 3. What application materials are required and where/how are they submitted?**
 - 4. What fees are required and to whom do I pay each fee?**
 - 5. What potential problems do you see with my application and how can I address these?**
- Other notes or questions:**



Identifying What You Want in a Lease

Use this space to plan important decisions about your lease terms. See ***Bonus: Move-In & Being a Landlord*** 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?**
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.