Multi-Family Land Use Policy and Zoning Study
Introduction

• Study Objective
• Methodology
• Key Findings
• Conclusion
Multi-Family Land Use Policy and Zoning Study

STUDY OBJECTIVE – HOUSING ELEMENT 1.B

Conduct a comprehensive analysis of multi-family land use to evaluate whether multi-family zoning is appropriately located. Possible outcomes of this analysis could include:

A. Adjust zoning maps as appropriate and redistribute multi-family zoning to locations suitable for multi-family development.

B. Avoid the designation or rezoning multi-family residential land for other uses or to lower densities without rezoning equivalent land for higher density multi-family development.

B. Identifying sites for multi-family, mixed-use, affordable workforce, and special needs housing, when undertaking community planning and zoning processes.
Multi-Family Land Use Policy and Zoning Study (continued)

STUDY OBJECTIVE – VOLUNTARY COMPLIANCE AGREEMENT

Implement Voluntary Compliance Agreement with the Federal Department of Housing and Urban Development (HUD):

Evaluate existing multi-family Land Use Designations within the unincorporated county to determine whether zoning is appropriate to allow additional affordable housing development beyond existing areas of racial or ethnic concentration.
Methodology

EVALUATING WHETHER MULTI-FAMILY HOUSING IS APPROPRIATELY LOCATED

- Historic and current policy and regulatory framework for real estate development *(Section III – General Planning Framework)*

- Existing zoning and zoning districts that allow multi-family housing and where they are located *(Section IV - Current Land Use Designations & Zoning and Section VI – Zoning Analysis by Planning Area)*

- Areas of minority concentration and their zoning make-up *(Section VII – Impediments to Fair Housing Choice)*

- Constraints from physical conditions and natural hazards affecting the suitability of multi-family zoning locations *(Section VI – Zoning Analysis by Planning Area and Section VIII – Environmental Hazards).*
Countywide Plan
Planning Areas

1. Novato
2. Las Gallinas
3. San Rafael Basin
4. Upper Ross Valley
5. Lower Ross Valley
6. Richardson Bay
7. West Marin
Key Findings

1. A large proportion of residential areas only allow single-family development.

2. The zoning definition for “Single-Family Dwellings” may not clearly reflect recent State law allowances for ADUs.

3. There are limited parcels available for multi-family housing due to existing predominant land use patterns.

4. The CWP treats market rate and affordable housing in distinctly different ways.

5. There are correlations between the percentage of multi-family zoned properties in an area, the percentage of housing units that are renter-occupied, and the racial diversity of that area.

6. Increasing density is subject to environmental hazards.
Key Finding 1

A LARGE PROPORTION OF RESIDENTIAL AREAS ONLY ALLOW SINGLE-FAMILY DEVELOPMENT.

Number of Parcels by Zoning Type

- Single-Family (R, RSP, RA, RE, RR, RF), 20,188, 72%
- Multi-Family (RMP, RX), 2,844, 10%
- Mixed Agriculture/Single-Family (A2, ARP), 2,813, 10%
- Open Space/Park (OA), 718, 3%
- Primarily Agriculture (A3-A60, APZ), 641, 2%
- Business/Institutional, 822, 3%
- Two-Family (R2), 141, >1%

Source: Marin County Community Development Agency Enterprise Database (2019)
### Key Finding 1 (continued)

A LARGE PROPORTION OF RESIDENTIAL AREAS ONLY ALLOW SINGLE-FAMILY DEVELOPMENT.

<table>
<thead>
<tr>
<th>Zoning Type</th>
<th>Las Gallinas (4,386 parcels)</th>
<th>Lower Ross Valley (2,628 parcels)</th>
<th>Novato (3,091 parcels)</th>
<th>Richardson Bay (7,864 parcels)</th>
<th>San Rafael Basin (692 parcels)</th>
<th>Upper Ross Valley (1,448 parcels)</th>
<th>West Marin (3,025 Parcels)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-family</td>
<td>3,023 - 69%</td>
<td>2,348 - 89%</td>
<td>1,495 - 48%</td>
<td>5,568 - 71%</td>
<td>630 - 91%</td>
<td>1,158 - 80%</td>
<td>985 - 33%</td>
</tr>
<tr>
<td>Multi-family</td>
<td>907 - 21%</td>
<td>135 - 5%</td>
<td>112 - 4%</td>
<td>1,382 - 18%</td>
<td>34 - 5%</td>
<td>222 - 15%</td>
<td>17 - 1%</td>
</tr>
<tr>
<td>Two-family</td>
<td>0 - 0%</td>
<td>18 - 1%</td>
<td>0 - 0%</td>
<td>119 - 2%</td>
<td>4 - 1%</td>
<td>0 - 0%</td>
<td>0 - 0%</td>
</tr>
<tr>
<td>Primarily Agriculture</td>
<td>1 - &lt;1%</td>
<td>0 - 0%</td>
<td>87 - 3%</td>
<td>0 - 0%</td>
<td>0 - 0%</td>
<td>6 - &lt;1%</td>
<td>609 - 20%</td>
</tr>
<tr>
<td>Mixed Agriculture/Single-family</td>
<td>380 – 9%</td>
<td>29 – 1%</td>
<td>1,338 – 43%</td>
<td>67 – 1%</td>
<td>1 – &lt;1%</td>
<td>26 – 2%</td>
<td>695 – 23%</td>
</tr>
<tr>
<td>Business/Institutional</td>
<td>29 - &lt;1%</td>
<td>80 - 3%</td>
<td>38 - 1%</td>
<td>254 - 3%</td>
<td>7 - 1%</td>
<td>5 - &lt;1%</td>
<td>116 – 4%</td>
</tr>
<tr>
<td>Open Space/Park</td>
<td>46 - 1%</td>
<td>18 - 1%</td>
<td>21 - 1%</td>
<td>131 - 2%</td>
<td>16 - 2%</td>
<td>31 - 2%</td>
<td>594 – 20%</td>
</tr>
<tr>
<td>Floating Home</td>
<td>0 - 0%</td>
<td>0 - 0%</td>
<td>0 - 0%</td>
<td>346 - 4%</td>
<td>0 - 0%</td>
<td>0 - 0%</td>
<td>0 – 0%</td>
</tr>
</tbody>
</table>
Key Finding 1 (continued)

A LARGE PROPORTION OF RESIDENTIAL AREAS ONLY ALLOW SINGLE-FAMILY DEVELOPMENT.

The majority of zoning districts allow for single-family dwellings as compared to the number of zoning districts that allow for multi-family dwellings.

<table>
<thead>
<tr>
<th>Zoning</th>
<th>Multi-family Dwellings</th>
<th>Two-family Dwellings</th>
<th>Single-family Dwellings</th>
<th>Accessory Dwelling Units &amp; Junior ADUs</th>
<th>Floating Homes</th>
<th>Single Room Occupancy</th>
<th>Farm Worker Housing</th>
<th>Mobile Homes/ Mobile Home Parks</th>
<th>Affordable Housing</th>
</tr>
</thead>
<tbody>
<tr>
<td># of districts where use is allowed</td>
<td>16 of 38</td>
<td>18 of 38</td>
<td>35 of 38</td>
<td>36 of 38</td>
<td>3 of 38</td>
<td>7 of 38</td>
<td>9 of 38</td>
<td>7 of 38</td>
<td>37 of 38</td>
</tr>
</tbody>
</table>
Key Finding 2

THE ZONING DEFINITION FOR “SINGLE-FAMILY DWELLINGS” MAY NOT CLEARLY REFLECT RECENT STATE LAW ALLOWANCES FOR ADUS.

• “Single-family dwellings” is a land use type that allows for a building that is designed for and/or occupied exclusively by one family

• State statute allows a second detached or attached dwelling up to 1,200 square feet on a lot with a proposed or existing primary residence
Key Finding 3
THERE ARE LIMITED PARCELS AVAILABLE FOR MULTI-FAMILY HOUSING DUE TO EXISTING PREDOMINANT LAND USE PATTERNS.
Key Finding 3 (continued)

There are limited parcels available for multi-family housing due to existing predominant land use patterns.

Land Area (acres) by Zoning Type

- Primarily Agriculture (A3-A60, APZ), 96,639, 70%
- Single-Family (R, RSP, RA, RE, RR, RF), 8,846, 6%
- Multi-Family (RMP, RX), 3,998, 3%
- Mixed Agriculture/Single-Family (A2, ARP), 26,054, 19%
- Business/Institutional, 586, 1%
- Two-Family (R2), 11, >1%
- Open Space/Park (OA), 1,574, 1%

Source: Marin County Community Development Agency Enterprise Database (2019)
Key Finding 4

THE CWP TREATS MARKET RATE AND AFFORDABLE HOUSING IN DISTINCTLY DIFFERENT WAYS.

CWP Policies & Programs

• CD – 1.3 Reduce potential impacts

• CD-5.e Limit density for areas without water or sewer connections

• CD-6.a Consider Annexation of Urbanized Areas

• TR-1.e Uphold Vehicle Level of Service Standards
Key Finding 4 (continued)

THE CWP TREATS MARKET RATE AND AFFORDABLE HOUSING IN DISTINCTLY DIFFERENT WAYS.

CWP Policies & Programs

- CD – 1.3 Reduce potential impacts
- CD-5.e Limit density for areas without water or sewer connections
- CD-6.a Consider Annexation of Urbanized Areas
- TR-1.e Uphold Vehicle Level of Service Standards
Key Finding 5
THERE ARE CORRELATIONS BETWEEN THE PERCENTAGE OF MULTI-FAMILY ZONED PROPERTIES IN AN AREA, THE PERCENTAGE OF HOUSING UNITS THAT ARE RENTER-OCCUPIED, AND THE RACIAL DIVERSITY OF THAT AREA.

<table>
<thead>
<tr>
<th>County</th>
<th>Non-Hispanic White</th>
<th>Non-Hispanic Black or African American</th>
<th>Non-Hispanic American Indian and Alaska Native</th>
<th>Non-Hispanic Asian</th>
<th>Non-Hispanic Native Hawaiian and Other Pacific Islander</th>
<th>Non-Hispanic Some Other Race</th>
<th>Non-Hispanic Two or More Races</th>
<th>Hispanic/Latinx</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alameda</td>
<td>31.8%</td>
<td>10.5%</td>
<td>0.3%</td>
<td>29.4%</td>
<td>0.8%</td>
<td>0.3%</td>
<td>4.4%</td>
<td>22.5%</td>
</tr>
<tr>
<td>Contra Costa</td>
<td>44.4%</td>
<td>8.3%</td>
<td>0.2%</td>
<td>16.1%</td>
<td>0.5%</td>
<td>0.3%</td>
<td>4.8%</td>
<td>25.4%</td>
</tr>
<tr>
<td>Marin</td>
<td>71.4%</td>
<td>2.2%</td>
<td>0.2%</td>
<td>5.7%</td>
<td>0.1%</td>
<td>0.9%</td>
<td>3.7%</td>
<td>15.9%</td>
</tr>
<tr>
<td>Napa</td>
<td>52.8%</td>
<td>2.0%</td>
<td>0.2%</td>
<td>8.0%</td>
<td>0.2%</td>
<td>0.4%</td>
<td>2.6%</td>
<td>33.9%</td>
</tr>
<tr>
<td>San Francisco</td>
<td>40.6%</td>
<td>5.0%</td>
<td>0.2%</td>
<td>33.9%</td>
<td>0.3%</td>
<td>0.5%</td>
<td>4.3%</td>
<td>15.2%</td>
</tr>
<tr>
<td>San Mateo</td>
<td>39.6%</td>
<td>2.2%</td>
<td>0.2%</td>
<td>27.7%</td>
<td>1.3%</td>
<td>0.3%</td>
<td>4.0%</td>
<td>24.7%</td>
</tr>
<tr>
<td>Santa Clara</td>
<td>32.0%</td>
<td>2.4%</td>
<td>0.2%</td>
<td>35.7%</td>
<td>0.3%</td>
<td>0.2%</td>
<td>3.4%</td>
<td>25.8%</td>
</tr>
<tr>
<td>Solano</td>
<td>38.5%</td>
<td>13.6%</td>
<td>0.3%</td>
<td>15.0%</td>
<td>0.9%</td>
<td>0.3%</td>
<td>5.3%</td>
<td>26.1%</td>
</tr>
<tr>
<td>Sonoma</td>
<td>63.5%</td>
<td>1.4%</td>
<td>0.4%</td>
<td>3.9%</td>
<td>0.3%</td>
<td>0.5%</td>
<td>3.4%</td>
<td>26.5%</td>
</tr>
</tbody>
</table>
Key Finding 5 (continued)

There are correlations between the percentage of multi-family zoned properties in an area, the percentage of housing units that are renter-occupied, and the racial diversity of that area.

<table>
<thead>
<tr>
<th></th>
<th>All Households</th>
<th>Non-Hispanic White Households</th>
<th>Non-Hispanic Black or African American Households</th>
<th>Hispanic/Latinx Households</th>
<th>Non-Hispanic Asian Households</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Rent</td>
<td>Own</td>
<td>Rent</td>
<td>Own</td>
<td>Rent</td>
</tr>
<tr>
<td>Alameda</td>
<td>46.7%</td>
<td>53.3%</td>
<td>38.2%</td>
<td>61.8%</td>
<td>69.2%</td>
</tr>
<tr>
<td>Contra Costa</td>
<td>34.4%</td>
<td>65.6%</td>
<td>26.0%</td>
<td>74.0%</td>
<td>56.8%</td>
</tr>
<tr>
<td>Marin</td>
<td>36.2%</td>
<td>63.8%</td>
<td>30.6%</td>
<td>69.4%</td>
<td>70.6%</td>
</tr>
<tr>
<td>Napa</td>
<td>36.3%</td>
<td>63.7%</td>
<td>29.5%</td>
<td>70.5%</td>
<td>38.5%</td>
</tr>
<tr>
<td>San Francisco</td>
<td>62.4%</td>
<td>37.6%</td>
<td>63.8%</td>
<td>36.2%</td>
<td>76.8%</td>
</tr>
<tr>
<td>San Mateo</td>
<td>40.1%</td>
<td>59.9%</td>
<td>32.8%</td>
<td>67.2%</td>
<td>60.1%</td>
</tr>
<tr>
<td>Santa Clara</td>
<td>43.3%</td>
<td>56.7%</td>
<td>35.5%</td>
<td>64.5%</td>
<td>68.9%</td>
</tr>
<tr>
<td>Solano</td>
<td>39.3%</td>
<td>60.7%</td>
<td>31.5%</td>
<td>68.5%</td>
<td>57.1%</td>
</tr>
<tr>
<td>Sonoma</td>
<td>39.2%</td>
<td>60.8%</td>
<td>33.7%</td>
<td>66.3%</td>
<td>64.0%</td>
</tr>
</tbody>
</table>
Key Finding 5

THERE ARE CORRELATIONS BETWEEN THE PERCENTAGE OF MULTI-FAMILY ZONED PROPERTIES IN AN AREA, THE PERCENTAGE OF HOUSING UNITS THAT ARE RENTER-OCCUPIED, AND THE RACIAL DIVERSITY OF THAT AREA.

<table>
<thead>
<tr>
<th></th>
<th>Las Gallinas Valley</th>
<th>Lower Ross Valley</th>
<th>Novato</th>
<th>Richardсон Bay</th>
<th>San Rafael Basin</th>
<th>Upper Ross Valley</th>
<th>West Marin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single-Family</td>
<td>69%</td>
<td>89%</td>
<td>48%</td>
<td>71%</td>
<td>92%</td>
<td>80%</td>
<td>33%</td>
</tr>
<tr>
<td>Multi-Family and Duplex</td>
<td>21%</td>
<td>2%</td>
<td>4%</td>
<td>20%</td>
<td>6%</td>
<td>15%</td>
<td>&lt;1%</td>
</tr>
<tr>
<td>Non-Hispanic White</td>
<td>71.9%</td>
<td>86.7%</td>
<td>81.6%</td>
<td>73.2%</td>
<td>74.2%</td>
<td>82.1%</td>
<td>85.5%</td>
</tr>
<tr>
<td>People of Color</td>
<td>28.1%</td>
<td>13.3%</td>
<td>18.4%</td>
<td>26.8%</td>
<td>25.8%</td>
<td>17.9%</td>
<td>14.5%</td>
</tr>
</tbody>
</table>
Key Finding 6

INCREASING DENSITY IS SUBJECT TO ENVIRONMENTAL HAZARDS.
Conclusion

DISCUSSING THE OUTCOMES OF HOUSING ELEMENT PROGRAM 1.B

A. Adjust zoning maps as appropriate and redistribute multi-family zoning to locations suitable for multi-family development.

B. Avoid the designation or rezoning of multi-family residential land for other uses or to lower densities without rezoning equivalent land for higher density multi-family development.

C. Identifying sites for multi-family, mixed-use, affordable workforce, and special needs housing, when undertaking community planning and zoning processes.
Thank You

Photo Credit: Jeff Wong