

# Special Projects Worksheet



Project Name:  
Project Address:  
Applicant/Developer Name:

## 1. "Special Project" Determination:

### Special Project Category "A"

Does the project have ALL of the following characteristics?

- Located in a municipality's designated central business district, downtown core area or downtown core zoning district, neighborhood business district or comparable pedestrian-oriented commercial district, or historic preservation site and/or district<sup>1</sup>;
  - Creates and/or replaces 0.5 acres or less of impervious surface;
  - Includes no surface parking, except for incidental parking for emergency vehicle access, ADA access, and passenger or freight loading zones;
  - Has at least 85% coverage of the entire site by permanent structures. The remaining 15% portion of the site may be used for safety access, parking structure entrances, trash and recycling service, utility access, pedestrian connections, public uses, landscaping and stormwater treatment.
- No (continue)       Yes – complete Section 2 of the Special Project Worksheet

### Special Project Category "B"

Does the project have ALL of the following characteristics?

- Located in a municipality's designated central business district, downtown core area or downtown core zoning district, neighborhood business district or comparable pedestrian-oriented commercial district, or historic preservation site and/or district<sup>1</sup>;
  - Creates and/or replaces an area of impervious surface that is greater than 0.5 acres, and no more than 2.0 acres;
  - Includes no surface parking, except for incidental parking for emergency access, ADA access, and passenger or freight loading zones;
  - Has at least 85% coverage of the entire site by permanent structures. The remaining 15% portion of the site may be used for safety access, parking structure entrances, trash and recycling service, utility access, pedestrian connections, public uses, landscaping and stormwater treatment;
  - Minimum Gross<sup>2</sup> density of either 50 dwelling units per acre (for residential or mixed use projects) or a Floor Area Ratio<sup>3</sup> (FAR) of 2:1 (for commercial or mixed use projects)
- No (continue)       Yes – complete Section 2 of the Special Project Worksheet

### Special Project Category "C"

Does the project have ALL of the following characteristics?

- Is a preserved housing project with a deed restriction running at least 55 years, at rent/mortgage  $\leq 30\%$  of the maximum Area Median Household Income (AMI) limits adjusted for household size based on the maximum percentage of AMI for each income category, according to the Federal Department of Housing and Urban Development's (HUD's) definition of affordable housing in metropolitan areas.<sup>4</sup>
  - Primarily a residential project, i.e., at least two-thirds of the square footage of the project is designated for residential use.<sup>5</sup>
  - Minimum Gross<sup>2</sup> density of 40 Dwelling Units (DUs) per acre.
- No                       Yes – Calculate the Allowable Available Housing Credit using the steps below. Then complete Section 2 of the Special Project Worksheet.

<sup>1</sup> And built as part of a municipality's stated objective to preserve/enhance a pedestrian-oriented type of urban design.  
<sup>2</sup> Gross density is defined as the total number of residential units divided by the acreage of the entire site area, including land occupied by public rights-of-way, recreational, civic, commercial, and other non-residential uses.  
<sup>3</sup> Floor Area Ratio is defined as the ratio of the total floor area on all floors of all buildings at a project site (except structures, floors, or floor areas dedicated to parking) to the total project site area.  
<sup>4</sup> For metropolitan areas, HUD defines Acutely Low household incomes as 0-15% of AMI, Extremely Low household incomes as 16-30% of AMI, Very Low household incomes as 31-50% of AMI, Low household incomes as 51-80% of AMI, and Moderate household incomes as 81-120% of AMI.  
<sup>5</sup> Emergency homeless shelters constructed pursuant to and consistent with Government Code § 8698.4, including the definition of "homeless shelter" in subdivision (c), and that are temporary, are exempt from stormwater treatment requirements, and are required to implement site design measures (MRP Provision C.3.i) and relevant BMPs for unsheltered populations (Provision C.17).

# Special Projects Worksheet



**Step 1 - Weighted Sum Calculation:** Calculate the percentage of the project's DUs in each AMI category. Multiply the percentage of the project's DUs in each AMI category by the respective credit multiplier, per Table 1a below. Add the available credits for each affordable category to produce a weighted sum, and round to the nearest whole number.

- a. Total number of DUs: \_\_\_\_\_
- b. Total number of Managers' Units<sup>6</sup>: \_\_\_\_\_
- c. Total number of DUs for Affordable Credit Calculation (a - b): \_\_\_\_\_ (Use this number for calculating percentages in Table 1a)

Table 1a – Weighted Sum Calculation				
AMI	Number of DUs	Percentage of DUs	Credit Multiplier	Available Credit (% of DUs * Credit Multiplier)
Moderate (≤120% of AMI)			0.20	
Low (≤ 80% of AMI)			1.00	
Very Low (≤ 50% of AMI)			2.00	
Extremely Low (≤30% of AMI)			3.00	
Acutely Low (≤15% of AMI) <sup>7</sup>			4.00	
<b>WEIGHTED SUM (Rounded)</b>				

**Step 2 - Allowable Affordable Housing Credits:** Use Table 1b to identify the correct Weighted Sum Category for the Weighted Sum calculated in Step 1. This is the Allowable Affordable Housing Credit. For example, if the Weighted Sum is 45%, that would fall into the 41-50% Weighted Sum Category, and the maximum Allowable Affordable Housing Credit available to the project would be 50%.

Table 1b – Allowable Affordable Housing Credit Calculation		
Weighted Sum (X) Category	Allowable Affordable Housing Credit	Applicable Weighted Sum Category (Select One)
X ≤ 9%	0%	<input type="checkbox"/>
10% ≤ X ≤ 20%	20%	<input type="checkbox"/>
21% ≤ X ≤ 30%	30%	<input type="checkbox"/>
31% ≤ X ≤ 40%	40%	<input type="checkbox"/>
41% ≤ X ≤ 50%	50%	<input type="checkbox"/>
51% ≤ X ≤ 60%	60%	<input type="checkbox"/>
61% ≤ X ≤ 70%	70%	<input type="checkbox"/>
71% ≤ X ≤ 80%	80%	<input type="checkbox"/>
81% ≤ X ≤ 90%	90%	<input type="checkbox"/>
91% ≤ X	100%	<input type="checkbox"/>

<sup>6</sup> Up to three DUs that are used as building managers' DUs may be excluded from the percentage calculations.

<sup>7</sup> DUs that are free to tenants, i.e., that do not charge tenants any rent/mortgage, are included in this category.

## Special Projects Worksheet



### 2. LID Treatment Reduction Credit Calculation:

Category	Impervious Area Created/ Replaced (acres)	Site Coverage (%)	Project Density or FAR	Density/Criteria	Allowable Credit (%)	Applied Credit (%)
A			N.A.	N.A.	100%	
B				Res ≥ 50 DU/ac or FAR ≥ 2:1	50%	
				Res ≥ 75 DU/ac or FAR ≥ 3:1	75%	
				Res ≥ 100 DU/ac or FAR ≥ 4:1	100%	
C		N.A.		<b>Allowable Affordable Housing Credit from Step 2 above</b>	0%-100%	
				<b>Location credit (select one):</b>		
				Entire project is located within ¼ mile of transit hub <sup>8</sup>	5%	
				Entire project is located within a planned PDA <sup>9</sup>	10%	
				<b>Density credit (select one):</b>		
				Res ≥ 40 DU/ac	5%	
				Res ≥ 60 DU/ac	10%	
				Res ≥ 100 DU/ac	15%	
				<b>Parking credit (select one):</b>		
				No surface parking	5%	
				<b>TOTAL CREDIT =</b>		

<sup>8</sup> "Transit hub" is defined as a rail, light rail, or commuter rail station, ferry terminal, or bus transfer station served by three or more bus routes. (A bus stop with no supporting services does not qualify.)

<sup>9</sup> A "planned Priority Development Area" is an infill development area formally designated by the Association of Bay Area Government's / Metropolitan Transportation Commission's FOCUS regional planning program.