

Dyett & Bhatia Work Program for the Development Title Update and General Plan Revisions

**Approved by the San Joaquin County Board of
Supervisors on March 24, 2020**

NARRATIVE: APPROACH & PROPOSED WORK PLAN

The section presents our understanding of the assignment by offering a specific work plan for the Development Title Update, General Plan revisions, and zone reclassifications, focusing on actual tasks, proposed meetings, and deliverables. It includes all of the critical factors that will need to be addressed. Only minor alternative approaches are proposed, because we believe the County's work plan is well conceived. For example, we propose one or two days of individual or small group stakeholders interviews with 50-60 individuals rather than two large meetings. The Work Plan envisions study sessions with the Planning Commission on a Diagnosis Report and Preliminary Recommendations, followed by meetings on modules of preliminary regulations, proposed General Plan revisions, and proposed Zoning Map changes. The Board would be briefed on the Diagnosis Report and Planning Commission direction on the preliminary recommendations presented to them. We do not recommend have the Board review all of the interim documents as it may be more efficient to work through details and respond to public comments with the Planning Commission. Interim Board briefings could be scheduled at major milestones, and County staff could conduct these with materials we provide, or we could attend.

Issues will arise during public outreach and discussions with county staff, and our work plan provides a process for resolving them (additional details are presented in the Form I, Questionnaire). By moving from agreements on general approaches to the outline of specific regulations and then agreements on modules of preliminary regulations, the work program involves County staff and the community in the update process and generates a sense of ownership and commitment to the new regulations and the General Plan revisions.

Although the work program is designed to address problems that may exist throughout the entire body of current zoning regulations, the primary emphasis will be the preparation of a Title 9 amendments to implement the 2035 General Plan and to meet the requirements of State and federal law. A specific additional deliverable we propose is an Accessory Dwelling Unit Manual that will contain build-

ing permit sets for architectural plans for a number of different configurations and sizes of these units, accompanied by energy reports and structural engineering calculations and drawings. We believe this Manual can streamline the review and approval process. We also will prepare a Users Guide to Title 9 and up to six counter handouts, which could cover topics such as fences, outdoor storage, "right to farm," adequate public facilities and fees required, traffic mitigation, mixed use development, parking and landscaping.

The proposed team, led by Dyett & Bhatia, includes ICF who will be responsible for the environmental documentation, an Initial Study and Supplemental Negative Declaration tiering off the 2035 General Plan Final Environmental Impact Report and Richardson Pribuss Architects, who will prepare an Accessory Dwelling Unit Manual with architectural plans, Title 24 analysis, and structural engineering drawings and calculations for alternative unit sizes and configurations, assisted by Kelly Turbin, PE, a California-licensed structural engineer.

Task 1: Initiation; Background Research

1-A *List of Data Needs; Kickoff Meeting.* Prepare a list of data needs for County staff prior to a kickoff meeting with County staff, including General Plan Land Use and Zoning Map GIS files; selections of recent project applications with site plans and building sections/elevations (accessory dwelling units, multi-family, mixed use, and industrial or other building types, sample of County staff reports), list of General Plan revisions, and list of Zone reclassifications. Prepare a memo on objectives for the Development Title update and meet with County staff to discuss their expectations for the new Development Title, finalize the work program, schedule the stakeholder interviews and community meeting, schedule meetings with key policy makers, including Planning Commissioners and Supervisors, and clarify roles and responsibilities.

1-B *Background Studies; Field Trip.* Review General Plan policies related to zoning and identify in a matrix format those that could be implemented in Title 9 (e.g. General Plan policies that identify new or modified zoning districts, land use regulations, density/intensity standards, development standards, administrative procedures, and bonus/incentive programs). Review existing zoning regulations including provisions that Staff has identified as problematic. Review staff reports for selected projects, focusing on issues raised and conditions of approval. Identify conflicts with the General Plan and State & Federal law for signs, wireless telecommunications, and “protected uses” such as residential care and religious land uses. Tour the County in a field trip organized by County staff to see examples of specific zoning issues, to be scheduled the same day as the kickoff meeting.

1-C *General Plan Land Use/Zoning Districts Review.* Review an overlay of existing zoning on the General Plan Land Use Diagram (Countywide and in Urban Communities and Rural Communities); discuss with staff the purpose of Plan designations vs. existing zoning districts and changes needed. Prepare a summary list of map changes and one or maps showing them, which may be in an Atlas or sectional map format.

1-D *Choices for Zoning Update: Evaluation and Preliminary Recommendations.* Prepare a Diagnosis Report, summarizing General Plan direction, the background research conducted, and issues identified in Task 2 through stakeholder interviews, policy maker interviews, and the community meeting, and outlining preliminary recommendations and options based where appropriate on peer communities and “best practices”. Revise draft based on County staff comments prior discussion with the Planning Commission and Board of Supervisors at study sessions.

<i>Meetings</i>	<i>Products</i>
<ul style="list-style-type: none"> • County staff kickoff meeting and work session on General Plan policy matrix • Planning Commission and Board of Supervisors study sessions on Diagnosis Report 	<ul style="list-style-type: none"> • Memo on Development Title update; refined work program • General Plan/Zoning composite map; list of potential rezonings for consistency. • Diagnosis Report: Evaluation and Preliminary Recommendations

Task 2: Outreach

2-A *Interviews.* Conduct stakeholder interviews with 35 to 50 key informants identified by County staff over a one- or two-day period, with concurrent, one-hour interviews of 2-4 people. Conduct meetings with each of five Planning Commissioners and five Supervisors. Prepare summary notes of interviews.

2-B *Community Meetings.* Prepare for and conduct an initial community meeting on the Title 9 update and General Plan revisions; outline options for community input (e.g. online comment form, Instagram posting of zoning issues). Allow for small group discussions to identify specific concerns in an informal setting. Summarize community input received. A second community meeting could introduce the public review drafts prior to Planning Commission hearings.

2-C *Project Website and Online Outreach.* A project website will be created and maintained. It could be freestanding with links to the County’s website or embedded in the County’s existing website. It will have information about the purpose of the Development Title update, the General Plan revisions, anticipated Zoning Map revisions, and public participation activities, including an online comment form, and provide access to meeting materials and reports. Additionally, an online survey will be created to help identify specific community concerns and priorities, and to

reach community members who may not be able to attend community meetings. Links to the survey will be available on the project website and distributed via County email lists. Summarize community input received through online survey.

Meetings	Products
<ul style="list-style-type: none"> County staff kickoff meeting and work session on General Plan policy matrix Stakeholders interview Community meetings 	<ul style="list-style-type: none"> Stakeholder interview summaries; community meeting notes Community meeting notes Project website Online survey summary report

Task 3: Development Title Update

3-A Confirm Choices for New Zoning and Additional Research. Following the Planning Commission and Board study session, prepare a memorandum summarizing a preferred direction – recommended changes to the existing regulations and new provisions to implement the General Plan, correct technical issues and respond to State and federal law – and outlining additional research on “best practices” and regulatory choices in response to Commission comments. Also confirm Zoning Map and General Plan revisions.

3-B Annotated Outline. Prepare an annotated outline of the Development Title technical amendments with a “plain English” commentary. The outline will lay out the basic structure of the proposed amendments to the Development Title for General Plan implementation and will be in sufficient detail to indicate what changes will be made to current regulations, what diagrams and graphics are included, and what additional research will be undertaken on specific topics, including:

- Amendments to use regulations, density and development standards for existing zoning districts, provisions for infill, adaptive reuse, and transi-

tional standards, including FARs for non-residential districts, new mixed use zones, and minimum parcel sizes and related standards for agricultural zones;

- Additions to definitions and use classifications (e.g. live/work classifications, junior accessory dwelling units) and new sections, such as “rules for measurement”;
- Supplemental standards applying countywide, including consolidation of existing standards for specific uses into one division or section, right-to-farm and agricultural buffers, and County-staff identified work on renewable energy, SMARA and quarrying regulations, accessory dwellings, sign regulations, underground utilities, fire standards including for Wildland Urban Interface Zones, natural and cultural resource, recycling, agritourism, wine, and hospitality industries; and
- Administration, including design review, if desired, permitting procedures, appeals, and enforcement. Discuss need for formal procedures for “New Communities Guidance”.

3-C Review Outline. Review draft Outline of Zoning Amendments with staff and County Attorney; revise, based on comments received. The outline will be updated as modules of preliminary regulations are prepared. Because it's simply a reference document on overall organization of amendments, it would not be the subject of a Planning Commission study session.

Meetings	Products
<ul style="list-style-type: none"> County Staff meeting or teleconference on draft outline 	<ul style="list-style-type: none"> Memo on preferred direction; Annotated Outline – draft and final

Module #1: General Provisions and Administrative Provisions

- 3-D *Administrative Procedures Analysis.* Refine streamlining opportunities and any new procedures for General Plan implementation. Confirm direction with County staff.
- 3-E *Prepare Revised Definitions and Use Classifications.* Prepare revised definitions, including appropriate illustrations, and rules for measuring building height, floor area ratios, and planting area and determining setback averaging. Prepare additions to use classifications and group like terms under headings to facilitate understanding of differences among terms (e.g. residential housing types, recycling terms, sign and lighting terms).
- 3-F *Prepare Module #1: Title 9 General Provisions and Administrative Provisions.* Include proposed amendments to general and administrative provisions, permitting procedures, definitions, use classifications, and rules of measurement; review with County staff and revise, based on County staff comments. Address how to respond to requests for SB 35 non-discretionary review for affordable multi-family housing and ministerial review of accessory dwelling units meeting zoning standards.
- 3-G *Conduct Planning Commission study session on Module #1 (highlights and discussion issues).* This study session will be preceded by a one-hour community “open house” to answer questions from the community about the module in an informal setting.

Module #2: Zoning Districts and Design Standards

- 3-H *Use Regulations.* Prepare amendments to current use regulations to implement the General Plan, streamline the process, and respond to Staff and stakeholder/community concerns, including such issues as live/work, adaptive reuse, residential care facilities, expansion of community assembly to include religious assembly short-term rentals of rooms in single family homes, flex space in light industrial zones to attract jobs, and mixed use development.

- 3-I *Development and Design Standards Analysis.* Update development standards and identify new standards and performance requirements to implement the General Plan, such as:

- Base and maximum densities and FARs for non-residential uses;
- FAR exemptions;
- Height and upper-story setback requirements, where appropriate;
- Neighborhood-specific or building type design standards;
- Setback, streetscape, frontage and building design standards; and
- Outdoor living area for multi-family development.

Determine whether any special rules or adjustments in standards are needed to facilitate infill development and provide for “New Communities Guidance.”

- 3-J *Prepare Module #2, Amendments to Zoning District Regulations.* Prepare Module 2, and then meet with County staff to review proposed amendments to district regulations, use regulations, and development and design standards; revise based on comments received.
- 3-K *Conduct Planning Commission study session on Module #2 (highlights and discussion issues).* This study session will be preceded by a one-hour community “open house” to answer questions about the module and Preliminary Zoning Map showing proposed rezoning needed for General Plan consistency in an informal setting.

Module #3: Countywide and Special Purpose Regulations

- 3-L *Update Countywide or Area Standards.* Prepare new or revised Countywide standards and performance requirements for implementing the General Plan. Topics may include, but are not limited to:
- Adequate public facilities requirements related to Divisions 11 and 12;

- Agritourism, wine and hospitality industries; tasting rooms;
 - Building and site development standards, including accessory uses, accessory dwelling units, accessory structures and temporary uses, hillside slope analysis, performance standards, allowable projections and encroachments, walls, fences and screening;
 - Environmental justice development standards relating to implementing SB 1000;
 - Expanded lighting standards, including specific standards for lamp types and shielding and maximum lighting limits for lighting zones in residential and mixed use zoning districts and commercial and industrial zoning districts;
 - Green Building, Landscaping and Lighting standards;
 - Natural and cultural resource protection;
 - Nonconforming buildings and uses, including whether classes of nonconformity should be established with different rules on continuation and enlargement and adaptive reuse;
 - Outdoor facilities; outdoor storage;
 - Outdoor gathering areas, plazas and privately-owned public open space; outdoor living area in multi-family development, courts and other private open space;
 - Parking location and facility design, including revisions to bike and car parking standards and dimensional standards, rules for calculating reductions for shared parking, TDM measures and parking in multi-family development;
 - Recycling facilities;
 - Sign regulations;
 - SMARA and quarrying regulations;
 - Utilities undergrounding; and
 - Vegetation management rules and standards in Wildland Urban Interface zones to reduce fire hazards.
- 3-M *Refine Regulations for Specific Uses.* Draft regulations to respond to County staff concerns about “problem” uses and additional regulations called for by the General Plan. These may address setbacks and screening for specific uses, hours of operation, parking and loading locations, refuse collection, vehicular access, size and intensity of use, screening of mechanical equipment and outdoor storage, recreational vehicle parking and storage, rail corridor restrictions; garage conversions, and home occupations. Consolidate all provisions for special uses into one chapter to facilitate administration.
- 3-N *Architectural Prototypes for Accessory Dwelling Units.* Richardson Architects (RA) will review the approach to this task with County staff and, based on direction received, prepare an Accessory Dwelling Unit (ADU) Manual, including up to five prototype architectural plans. These will be prepared by a licensed California architect for a variety of configurations and sizes, such as garage conversions (attached garage converted to living area), Junior ADU within a structure (350 square feet – SF), Attached and Detached ADUs (600 and either 800 or 1000 SF) and Detached ADU over garage. The Manual will include floor plans for each prototype, Title 24 reports on energy, and where new construction would occur, structural requirements prepared by Kelly Turbin, PE, a licensed structural engineer. For new construction, section, elevations and 3D axonometrics will be prepared. The Manual also will discuss variations in dimensional requirements that could be approved (e.g. up to 10 percent) and unique requirements associated with hillside sites. The manual will contain user-friendly figures and diagrams, and will have a clean visual design consistent with County identity standards and design. Review administrative draft with County staff and then revise based

on comments received prior to presentation to the Planning Commission.

- 3-O **Prepare Module #3, Countywide and Special Purpose Regulations.** Prepare draft regulations that apply Countywide or in multiple districts, including standards for specific uses. Prepare summary tables of supplemental standards and zoning diagrams needed to illustrate them. Review Module #3 with County staff and revise based on comments received.
- 3-P **Conduct Planning Commission study session on Module #3 (highlights and discussion issues) and the Accessory Dwelling Unit Manual.** This study session will be preceded by a one-hour community “open house” to answer questions in an informal setting.
- 3-Q **Prepare Public Review Draft.** Review comments on “modules” of preliminary regulations and prepare the Public Review Draft of the Development Title. Submit Administrative Draft for County staff review, and revise based on a consolidated set of comments. A Users Guide for the Title 9 update also will be prepared.

Meetings	Products
<ul style="list-style-type: none"> • Planning Commission (3), preceded by one-hour community open house 	<ul style="list-style-type: none"> • Modules 1, 2, & 3 (administrative & public review drafts) • Accessory Dwelling Unit Manual (administrative & public review drafts) • Title 9 Update (administrative & public review drafts) • Users Guide to Title 9 Update

Task 4: General Plan Revisions

- 4-A **Prepare Draft General Plan Revisions.** Based on a list provided by County staff, prepare a set of General Plan revisions in “redline” format with commentary to facilitate public and Planning Commission review. Submit an Administrative Draft for County staff review, and revise based on a consolidated set of comments. County staff would conduct

the Planning Commission study session on this product, and then provide direction on changes needed.

Meetings	Products
<ul style="list-style-type: none"> • Planning Commission study session 	<ul style="list-style-type: none"> • Proposed General Plan Revisions (administrative & public review drafts)

Task 5: Zoning Map Revisions

- 5-A **Prepare Pubic Review Draft of Proposed Zoning Reclassifications.** Work with County staff on a final public review draft of the proposed Zoning Map reclassifications so it is consistent with the General Plan. Review the Zoning Map revisions with the Planning Commission at the same study session at which the General Plan revisions are presented.

Teleconference	Products
<ul style="list-style-type: none"> • County staff conference call on Zoning Map reclassifications 	<ul style="list-style-type: none"> • Public Review Draft Zoning Map Reclassifications

Task 6: Environmental Analysis and Documentation

- 6-A **Prepare Initial Study (ICF).** Prepare an Initial Study to determine whether there are new significant environmental effects, a substantial increase in the severity of previously identified significant effects, or new information of substantial importance when compared to the analysis in the certified General Plan EIR. Address all environmental issues listed in Appendix G of the CEQA Guidelines. Since the proposed Development Title Update and zone reclassifications on the Zoning Map are consistent with the General Plan, the General Plan revisions are likely to be minor in nature from a CEQA perspective and result in a Negative Declaration (ND). An administrative draft will be prepared for County staff review and then revised based on a consolidated set of comments received. ICF will be responsible for delivery of the public review draft to the State Clearinghouse.

6-B Prepare Required Documentation and Respond to Comments Received (ICF). Prepare required CEQA notices when and as required (Notice of Completion, Notice of Intent, Notice of Determination). For budgeting purposes, ICF assumes that the County will be responsible for posting with the County Clerk and providing any additional required notifications (such as circulation in a newspaper of general circulation and to parties requesting notice or responsible agencies identified by the County). ICF will review all comments received during the 30-day review period and respond accordingly, incorporating all comments in the final Subsequent ND for the County’s use.

Meetings	Products
<ul style="list-style-type: none"> Public Hearing (up to 4 on request) 	<ul style="list-style-type: none"> Administrative Draft and Public Review Draft of Initial Study/ Negative Declaration; all Required CEQA Notices

Task 7: Public Hearings

7-A Prepare Public Review Draft. Review comments on “modules” of preliminary regulations and prepare the Public Review Draft of the Development Title. Submit Administrative Draft for County staff review, and revise based on a consolidated set of comments.

7-B Prepare Presentation and Outreach Materials. Prepare presentation materials, including explanatory visual aids and relevant diagrams, for community and Commission meetings and for an email newsletter or other County outreach.

7-C Participate in Public Review Process. Assist County staff in preparing for the public review process; including hearing notices for County staff to use for public notice, summary materials on the Draft Ordinance for use in County staff reports and County newsletter and briefings for key interest groups. A “comment form” could be used to focus comments on specific sections of the text and allow comments to be consolidated and

responses prepared efficiently. Distinctions would be made between comments that address: 1) adopted General Plan policies; 2) new regulatory policies that would be considered by the County Council; 3) regulatory provisions required by State or federal law; and 4) concerns that are beyond the scope of the Ordinance.

7-D Planning Commission Review. Present the Public Review Draft of the Development Title, the General Plan revisions, and the Zoning Map reclassifications to the Planning Commission at one or two public hearings.

7-E Prepare Final Hearing Draft. Following Commission action, prepare a Board Hearing Draft of the Development Title and final draft versions of General Plan revisions and Zoning Map reclassifications for Board review and action.

Meetings	Products
<ul style="list-style-type: none"> Planning Commission Hearings (1 or 2) 	<ul style="list-style-type: none"> Presentation Materials Board Hearing Drafts of Development Title, General Plan revisions, and Zoning Map Reclassifications

7-F Board of Supervisors Review. Attend two Board public hearings to introduce the hearing draft of Title 9 update, the General Plan revisions, and the Zoning Map reclassifications and respond to Board questions.

7-G Final Documents. Following final Board action, make revisions reflecting any changes directed by the Board and submit the adopted Title, the adopted General Plan revisions and the adoption Zoning Map reclassifications in form for public distribution, codification and web-posting. Up to six counter handouts also could be prepared for key topics, such as fences, outdoor storage, “right to farm,” adequate public facilities and fees required, traffic mitigation, mixed use development, parking and landscaping.

<i>Meetings</i>	<i>Products</i>
<ul style="list-style-type: none"> • County staff work sessions (conference calls) on Planning Commission direction and revisions needed for Board hearings • Public hearings (2) 	<ul style="list-style-type: none"> • Presentation Materials • Hearing Draft of Development Title, Zoning Map Revisions, and General Plan Revisions • Adopted Title, Adopted General Plan Revisions and Adopted Zoning Map Revisions; Counter Handouts

ASSUMPTIONS FOR THE PROJECT

The Work Plan based on the following assumptions:

1. **Documents and Digital Files.** The County will provide a Word file of existing zoning regulations and GIS shape files of the Zoning Map and the Land Use Diagrams for individual communities and countywide land use.
2. **Consolidated Comments and Direction.** County staff will provide a single set of consolidated comments on the review drafts of all documents.
3. **Final Documents in Printed and Digital Form.** We will provide camera ready hard copies and digital files of administrative draft and public review/hearing drafts of all documents in an editable electronic format (MS Word) and Adobe PDF formats. We will provide all mapping updates as packaged ArcGIS files.
4. **Public Meetings.** This Work Plan includes time for preparation and attendance at staff and public meetings (one community meeting, open houses before Planning Commission meetings/study sessions, a Board of Supervisors briefing on then Diagnosis Report, and four public hearings); additional meeting attendance would be an additional service billed hourly, including travel time.

