

HOUSING UNIT SURVEY INSTRUCTIONS

Please complete the Housing Unit Survey from the Department of Finance (Finance) by **February 16, 2024**. The online survey can be accessed at: https://cadof.qualtrics.com/jfe/form/SV_50csKzUYNihHw22

SECTION I. DATA SOURCE

Select your jurisdiction's source or method for reporting housing units gained from new construction (choose one option).

1. **Completed Housing Units:** Newly constructed units from **January 1, 2023 through December 31, 2023** based on Final Inspections, Certificates of Occupancy, Completion Certificates, and Utility Releases. Please do **NOT** provide building permits issued. If you only have building permits issued to indicate new housing construction, report them as indicated below under Adjusted Building Permits.
2. **Adjusted Building Permits:** Report the number of building permits that were issued for the following time frames:
 - **Accessory Dwelling Units** issued from **July 1, 2022 to June 30, 2023**
 - **Single Family Units** issued from **July 1, 2022 to June 30, 2023**
 - **Multi-Family Units** issued from **January 1, 2022 to December 31, 2022**

SECTION II. ACCESSORY DWELLING UNITS (ADUs)

An ADU is an accessory to a primary residence that provides complete independent living facilities for one or more persons. It shall include permanent provisions for living, sleeping, eating, cooking, and sanitation on the same parcel as the existing unit is situated. **ADUs are categorically independent of other types of units for this survey and should not be counted within other housing unit categories.** ADUs can be either detached or attached based on the following rules:

1. An ADU is a detached unit if the structure containing the ADU is a stand-alone structure, meaning there are no shared walls with the original unit. Common types of ADUs in this category are converted pool houses and detached garages. Mobile homes placed in the backyard of a single family unit may also be considered an ADU.
2. An ADU is an attached unit if there is a shared wall and/or shared utility systems with the original housing unit. Commonly shared utility systems are water/sewer lines.

ADUs GAINED

Please report all detached and attached ADUs gained within your jurisdiction from:

1. **New construction.** Enter all newly constructed ADUs for the time period selected in Section I.
2. **Conversions.** If your jurisdiction gained any new housing units from converting existing space (e.g., attached or detached garage, storage area, carport, or other existing accessory structure) on the lot of a primary residence into an independent living unit, report these units under "conversions" from January 1, 2023 through December 31, 2023.
3. **Non-permitted activity.** Consists of non-permitted residential units; military units converted to civilian use without the issuance of a building permit; and non-permitted residential units added illegally within your jurisdiction. An example of an illegal unit -- a secondary non-permitted unit intended for residential occupancy added to an existing primary residence.

ADUs LOST

Please report all detached and attached ADUs lost within your jurisdiction from January 1, 2023 through December 31, 2023.

AFFORDABLE ADUs

Of the total reported number of ADUs gained and lost, enter the number of units that are defined as Affordable. Refer to Page 4 for the definition of Affordable Units.

SECTION III. SINGLE FAMILY HOUSING UNITS

Single Family Housing Unit categories include:

Single-Detached Unit - a one-unit structure with open space on all four sides. The unit often possesses an attached garage.

Single-Attached Unit - a one-unit structure attached to another unit by a common wall, commonly referred to as a townhouse, half-plex, or row house. The shared wall or walls extend from the foundation to the roof with adjoining units to form a property line. Each unit has individual heating and plumbing systems.

Mobile Home Unit - a one-unit structure that was originally constructed to be towed on its own chassis.

NOTE: Do not include ADU totals within the reported changes in Single Family Housing Units.

SINGLE FAMILY HOUSING UNITS GAINED

Please report all single family housing units gained within your jurisdiction from:

1. **New construction.** Enter all newly constructed single family detached and attached units for the time period selected in Section I. For mobile homes, report unit changes on lots from January 1, 2023 to December 31, 2023 regardless of the source of new construction.
2. **Conversions or units that moved into your jurisdiction.** If your jurisdiction gained any new housing units from converting non-residential buildings into housing units, or by converting one type of housing unit structure into a new housing structure, (such as a single family home gained by converting a duplex) or any new housing units gained from military conversions, report these units under "conversions" from January 1, 2023 through December 31, 2023. Also, report any housing units moved into your jurisdiction.
3. **Non-permitted activity.** Consists of non-permitted residential units; military units converted to civilian use without the issuance of a building permit; and non-permitted residential units added illegally within your jurisdiction.

SINGLE FAMILY HOUSING UNITS LOST

Please report all single family units lost within your jurisdiction from:

1. **Demolition, fire, or other natural disasters.** Report residential housing units lost within your jurisdiction from January 1, 2023 through December 31, 2023 due to demolition, fire, earthquake, flood, or other natural disasters.
2. **Conversions or units that moved out of your jurisdiction.** Report units lost from converting housing units into non-residential uses, or lost by converting one type of housing unit structure into a new housing structure (such as a single family home lost by converting it into a duplex) from January 1, 2023 through December 31, 2023. Also, report any units that moved out of your jurisdiction.
3. **Non-permitted activity.** Report non-permitted residential units and illegally added non-permitted residential units lost within your jurisdiction from January 1, 2023 through December 31, 2023.
4. **Wildfires.** Referencing data entered in row one of this section, enter the total number of housing units lost in this category due to wildfires.

AFFORDABLE SINGLE FAMILY HOUSING UNITS

Of the total reported number of single family housing units gained and lost, enter the total number of units that are defined as Affordable. Refer to Page 4 for the definition of Affordable Units.

SECTION IV. MULTI-FAMILY HOUSING UNITS

Multi-Family Housing Unit categories include:

2-, 3-, and 4-plex Units per Structure - a structure containing two, three, or four units and not classified as a single-unit attached structure. The units in the structure share attic space and heating and plumbing systems.

5+ Units per Structure - a structure containing five or more housing units. The units share attic space, and heating and plumbing systems. **NOTE:** Condominium refers to an ownership classification, not a structural type. Report condominiums based on their structural types.

NOTE: Do not include ADU totals within the reported changes in Multi-Family Housing Units.

MULTI-FAMILY HOUSING UNITS GAINED

Please report all multi-family housing units gained within your jurisdiction from:

1. **New construction.** Enter all newly constructed multi-family units based on the given categories for the time period selected in Section I. Please provide data on the number of structures in each category as well as the total number of units.
2. **Conversions or units that moved into your jurisdiction.** If your jurisdiction gained any new housing units from converting non-residential buildings into housing units, or by converting one type of housing unit structure into a new housing structure, (such as a duplex gained by converting a single family home) or any new housing units gained from military conversions, report these units under "conversions" from January 1, 2023 through December 31, 2023. Also, report any housing units moved into your jurisdiction.
3. **Non-permitted activity.** Consists of non-permitted residential units; military units converted to civilian use without the issuance of a building permit; and non-permitted residential units added illegally within your jurisdiction.

MULTI-FAMILY HOUSING UNITS LOST

Please report all units lost within your jurisdiction from:

1. **Demolition, fire, or other natural disasters.** Report residential housing units lost within your jurisdiction from January 1, 2023 through December 31, 2023 demolition, fire, earthquake, flood, or other natural disasters.
2. **Conversions or units that moved out of your jurisdiction.** Report units lost from converting housing units into non-residential uses, or lost by converting one type of housing unit structure into a new housing structure (such as a duplex lost by converting it into a single family home) from January 1, 2023 through December 31, 2023. Also, report any units that moved out of your jurisdiction.
3. **Non-permitted activity.** Report non-permitted residential units and illegally added non-permitted residential units lost within your jurisdiction from January 1, 2023 through December 31, 2023.
4. **Wildfires.** Referencing data entered in row one of this section, enter the total number of housing units lost in this category due to wildfires.

AFFORDABLE MULTI-FAMILY HOUSING UNITS

Of the total reported number of multi-family housing units gained and lost, enter the total number of units that are defined as Affordable. Refer to Page 4 for the definition of Affordable Units.

SECTION V. ANNEXATIONS AND DETACHMENTS (cities only)

Cities must list all inhabited annexations and detachments that occurred between January 1, 2023 and December 31, 2023 in this section. Include the full name of each annexation/detachment, the LAFCO resolution number and effective date. For inhabited annexations and detachments, report all existing housing units within the area as of the **effective date**. Housing units built **after** the effective date should be reported as housing units gained in Section III Single Family Housing Units and Section IV Multi-Family Housing Units.

SECTION VI. CIVILIAN GROUP QUARTER CHANGES

Civilian Group Quarters are non-household residential facilities. Types of Group Quarters facilities include: nursing and convalescent homes; orphanages; shelters; convents; private dormitories; and local facilities for the mentally and physically disabled. Residents living in these facilities have no permanent residence elsewhere.

Please report resident Group Quarters change information for facilities that opened or closed between January 1, 2023 and December 31, 2023, or whose resident population significantly changed during the calendar year. Annexed Group Quarters facilities should also be reported in this section. Please select the type of change (Annexed, Detached, Opened, Closed or Changed) and provide the Group Quarter facility details (name, address and phone number). Enter the total number of beds available at the start of the year and at the end of the year. **NOTE:** If the facility opened during the reporting year, enter 0 for the number of beds available at the start of the year.

ADDITIONAL INFORMATION

What is an Affordable Unit? Any unit with a legally enforceable agreement for at least 30 years that restricts occupancy and requires affordable housing costs (Health and Safety Code section 50052.5) or affordable rent (Health and Safety Code section 50053) be provided to person(s) whose household income qualifies as extremely-low, very-low, low, or moderate income. Legally enforceable agreements may include deed-restrictions recorded by the local County Recorder or affordability restrictions enforceable by a public agency (e.g. local inclusionary ordinances or density bonus units).

Survey Submission: Please return the completed survey form by one of the following methods:

- Online HUS: https://cadof.qualtrics.com/jfe/form/SV_50csKzUYNIhHw22
- Download PDF File at https://cadof.qualtrics.com/jfe/form/SV_aaeM4y5cLq1Wr0G and submit via:
 - E-mail: Housing.Survey@dof.ca.gov
 - Fax: (916) 327-0222

Please provide documentation for any additional information that may affect your area's population. Include the basis of the population change and the source of the information. Finance reviews all additional population change information documented by local areas.

We do accept housing survey revisions for previous years going back to the most recent decennial census. For blank survey forms from previous years, please email Housing.Survey@dof.ca.gov. An example of a housing survey revision includes: 'grandfathered' units that were constructed without a permit, but which were brought into compliance during the reporting time frame.