

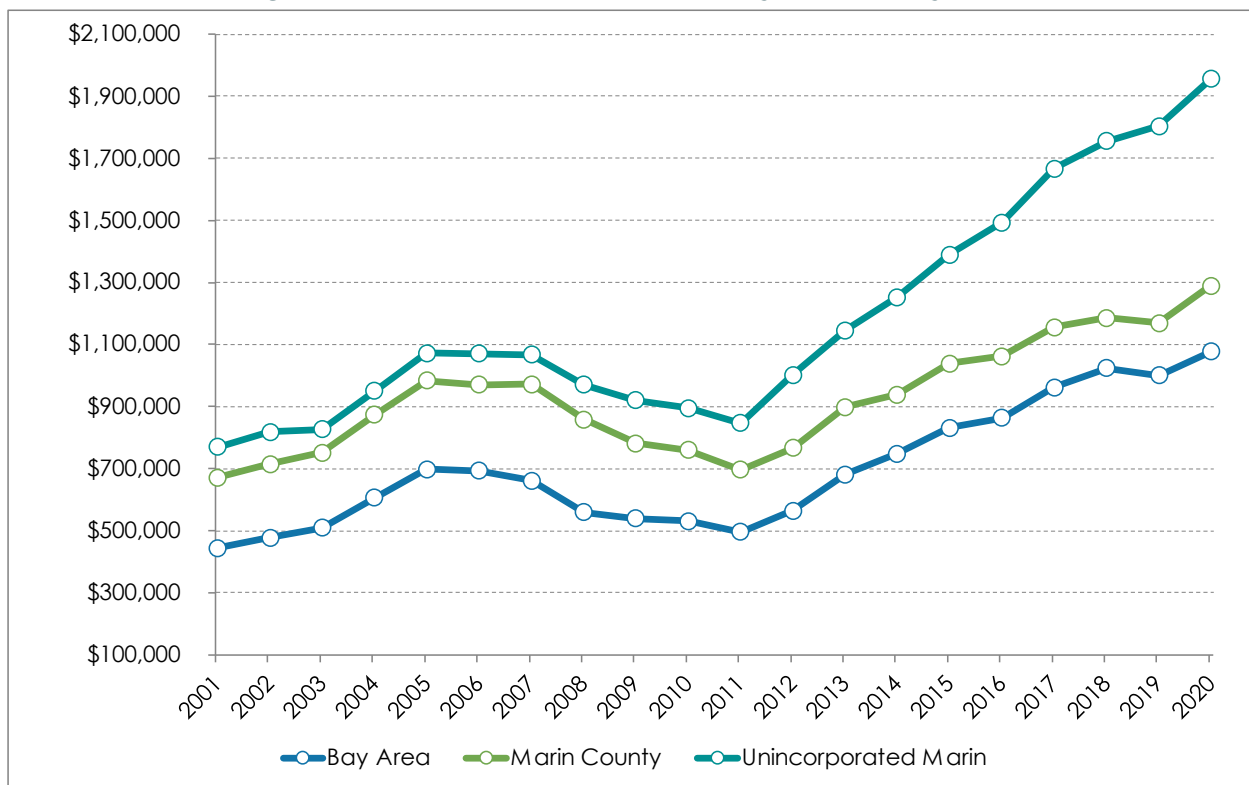


Attachment 1: Housing Needs and Housing Costs Data

→ Sales Prices and Rents

In December 2020, the typical home value in unincorporated Marin County was estimated at \$1,955,760 per data from Zillow. The largest proportion of homes were valued between \$1 million to \$1.5 million. By comparison, the typical home value is \$1,288,800 in Marin County and \$1,077,230 the Bay Area, with the largest share of units valued \$750,000 to \$1 million (county) and \$500,000 to \$750,000 (region).¹After securing a 20% down payment, a household would need to earn a monthly income of about \$6,620 to afford a home at the median value.

Figure 1: Home Values in Marin County and the Bay Area



Zillow data is also available by ZIP code, and recent trends are shown for the unincorporated communities in Table II- 25. In 2020, the range of home values was

¹ Housing Needs Data Report: Unincorporated Marin. AGAG/MTC Staff and Baird+Driskell Community Planning, April 2, 2021.

between \$916,518 to \$3,416,244, and all communities experienced significant increases in home values since 2013 (minimum of 29 percent increase in value).

Table 1: Home Values, Unincorporated Communities

Community Name	Zip Code	Home Value -Dec. 2013	Home Value - Dec. 2020	% Change in Value
Blackpoint-Greenpoint	94945	\$670,899	\$927,428	38.2%
Northern Costal West Marin	94929	\$757,012	\$1,049,628	38.7%
	94971	\$662,154	\$961,486	45.2%
Central Coastal West Marin	94956	\$827,089	\$1,290,055	56.0%
	94937	\$807,195	\$1,271,424	57.5%
The Valley	94946	\$1,322,537	\$1,706,118	29.0%
	94963	\$860,519	\$1,234,562	43.5%
	94973	\$677,232	\$971,882	43.5%
	94938	\$705,037	\$1,025,663	45.5%
	94933	\$645,740	\$916,518	41.9%
Southern Coastal West Marin	94970	\$1,744,475	\$3,416,244	95.8%
	94924	\$1,066,412	\$1,656,332	55.3%
	94965	\$1,036,162	\$1,418,479	36.9%
Marinwood/Lucas Valley	94946	\$1,322,537	\$1,706,118	29.0%
	94903	\$773,354	\$1,144,075	47.9%
Santa Venetia/Los Ranchitos	94903	\$773,354	\$1,144,075	47.9%
Kentfield/Greenbrae	94904	\$1,450,420	\$2,001,013	38.0%
Strawberry	94941	\$1,221,218	\$1,744,308	42.8%
Tam Valley	94941	\$1,221,218	\$1,744,308	42.8%
Marin City	94965	\$1,036,162	\$1,418,479	36.9%

Source: Zillow, Zillow Home Value Index (ZHVI).
Notes: Zillow describes the ZHVI as a smoothed, seasonally adjusted measure of the typical home value and market changes across a given region and housing type. The ZHVI reflects the typical value for homes in the 35th to 65th percentile range. The ZHVI includes all owner-occupied housing units, including both single-family homes and condominiums. More information on the ZHVI is available from Zillow.

Based on the current data available, rents in the unincorporated communities are \$2,500 per month or higher. The areas with the highest rents are the communities of Strawberry and Tam Valley. Assuming an affordability rate of no more than 30 percent of household income, an annual income of \$100,000 to \$136,000 would be required to rent in these communities. These rates price out all very low and many low-income households.

Table II- 1: Median Rent, Unincorporated Communities

Community	Zip Code	Median Rent
Blackpoint-Greenpoint	94945	\$2,501
Southern Coastal West Marin	94965	\$3,182
Marinwood/Lucas Valley	94903	\$2,750
Santa Venetia/Los Ranchitos	94903	\$2,750
Kentfield/Greenbrae	94904	\$2,754
Strawberry	94941	\$3,409
Tam Valley	94941	\$3,409
Marin City	94965	\$3,182
Source: RentCafe, October 2021		

→ 2023-2031 Housing Element Survey Findings on Housing Needs

The 2023-2031 Housing Element survey was focused on identifying housing priorities, needs and barriers in the unincorporated county, and was publicized in English and Spanish. The survey period ran from October through December 20th, 2021. There were 728 responses completed in English and 90 responses in Spanish, for a total of 818 responses.

The County used both digital and paper platforms for this survey. The digital Survey Monkey platform was promoted extensively through County communication channels including post-card mail-outs, multiple email communications, and social media. The paper format of the survey was shared with County residents directly at community events, via multiple Community-Based Organizations (CBOs) and publicized through online workshops.

The CBOs who supported the outreach effort included:

- Community Action Marin
- Community Land Trust Association of West Marin
- Lifehouse
- Marin Community Foundation / West Marin Community Services
- Marin Environmental Housing Collaborative
- San Geronimo Valley Affordable Housing Association
- Vivalon (serves people that need paratransit)
- West Marin Senior Services

❖ Key Findings

Housing Cost: One third of respondents (37%) spend between 30% and 50% of their income on housing costs, while another 19% of respondents spend over 50% of their income. In total, 56% of respondents stated that they spend over 30% of their income on housing costs. From the Spanish respondents alone, almost 60% of those who responded to the survey spend more than 50% of their income on housing costs.

Responses	English	Spanish	Combined
Less than 30% of income	260 (40%)	11 (13%)	271 (37%)
Between 30-50% of income	254 (39%)	18 (22%)	272 (37%)
More than 50% of income	95 (14%)	48 (59%)	143 (19%)
Does not apply	48 (7%)	5 (6%)	53 (7%)
Total	657 English respondents	82 Spanish respondents	739 combined respondents

Housing Priorities: Participants were asked to identify their top three housing priorities (out of seven choices).

Top housing choices for Unincorporated Marin County:

- 59% of respondents selected “Increase the amount of housing that is affordable to moderate, low, and very low- income residents”
- 47% of respondents selected “Increase homeownership opportunities for moderate, low- and very-low-income residents”
- 33% identified “Create programs to help existing homeowners stay in their homes”
- The remaining 4 choices were selected by 23% to 28% of the respondents

Housing Needs: Participants were asked to select all that apply from seven choices. The top three choices were:

There is insufficient housing in my community for:

- Low-income households (59%)
- Families with children (35%)
- Older adults: seniors, elderly (34%)

Housing Barriers: Participants were asked to identify the top barrier to affordable housing of out five choices.

Top barrier to affordable housing:

- 55% identified “Limited availability of affordable units”
- The remaining choices received between 5% and 18% of the responses.



Attachment 2: Summary of Adopted Guiding Principles for Site Selection

At the Joint Session of the Board of Supervisors and Planning Commission on December 7, 2021, your Board and Planning Commission provided feedback on the Guiding Principles and recommended an additional Principal.

❖ **Ensure Countywide distribution**

Taking into account the constraints imposed by environmental conditions and the availability of infrastructure and services, housing sites should be distributed throughout the County.

- Respond to housing needs of each community in unincorporated Marin County.
- Provide housing opportunities at locations near services (e.g., City Center Corridor, and villages in the Coastal and Inland Rural Corridors).
- Ensure housing sites have infrastructure capable of supporting development.
- To achieve the number of potential units required, housing units will need to be approved in all Supervisorial districts.

❖ **Address racial equity and historic patterns of segregation**

Affordable housing sites should be focused in areas of opportunity and should affirmatively further fair housing by promoting inclusive communities, furthering housing choice, and addressing racial and economic disparities.

- Locate affordable housing in areas with access to resources such as good schools, transportation, and that are environmentally healthy (e.g.: good air quality)
- Focus affordable family housing developments outside areas of minority concentration¹, as defined by the federal U.S. Department of Housing and Urban Development (HUD)²

❖ **Encourage Infill and redevelopment opportunities**

Taking into consideration the housing element site requirements, sites should focus on infill and limit development on greenfield areas.

- Identify sites within existing communities, close to services, jobs, transportation, and amenities
- Consider rezoning infill sites to accommodate affordable housing
- Accommodate housing on underutilized and marginal commercial properties and publicly-owned sites.

¹ Areas where non-White residents are disproportionately located, as defined by Fair Housing Site and Neighborhood Standards.

² In 2019, the County of Marin entered into a [Voluntary Compliance Agreement](#) (VCA) with HUD, which requires the County to prioritize family housing outside areas of minority concentration.

- Facilitate production of accessory dwelling units (ADUs).

❖ **Consider environmental hazards**

Locate housing sites in areas that could be mitigated to address the threat to life and property from these hazards.

- Identify sites where technologies, materials, and building methods could mitigate environmental hazards.
- Coordinate with Safety Element to prioritize sites that are in areas of less significant impact as a result of climate change.
- Plan for sites that include adequate routes for hazard evacuation.

❖ **Leverage surplus lands**

Consider making the most of development opportunities on sites owned by the County, religious institutions, schools, and the State when identifying housing sites.

- Evaluate County-owned property which could be considered for housing.
- Work with the State to identify and support opportunities for increased housing on State-owned land.
- Allow for housing development on parking areas and underutilized lands owned by religious and educational institutions (consistent with State law).

❖ **Ensure robust public engagement around all sites**

Create several opportunities for engagement and education around all candidate housing sites.

- Provide a variety of opportunities to evaluate and comment on all site scenarios.
- Provide opportunities for the public to suggest housing sites that may not be on the candidate sites list.
- Coordinate a variety of meeting types for the public to comment on sites, including Countywide workshops and community meetings.
- Provide an email address and phone number to receive comments and accommodate those who may not be able to attend meetings or have difficulty accessing other outreach opportunities.



Attachment 3: Balancing Act Scenarios

❖ Scenario #1: Ensure Countywide Distribution

The Countywide Distribution Scenario distributes housing sites throughout the County. It responds to housing demand throughout the County, locates housing near services (e.g., City Center Corridor and villages in the Coastal and Inland Rural Corridors), and distributes housing throughout all five Supervisorial districts.

❖ Scenario #2: Address Racial Equity and Historic Patterns of Segregation

The Equity Scenario emphasizes racial equity and addresses historic patterns of segregation by promoting inclusive communities, furthering housing choice, and examining racial and economic disparities. It locates affordable housing in areas with access to resources such as good schools, transportation infrastructure, and healthy living conditions such as good air quality. It focuses housing development outside areas of current minority concentration, as defined by the federal U.S. Department of Housing and Urban Development (HUD).

❖ Scenario #3: Encourage Infill and Redevelopment Opportunities

The Infill scenario focuses housing on infill sites within already developed areas and limits new development on larger undeveloped areas. It locates housing within existing communities and close to services, jobs, transportation, and amenities. It considers the rezoning of infill sites to accommodate affordable housing, suggests housing on underutilized and marginal commercial properties and publicly owned sites at higher densities and facilitates production of accessory dwelling units (ADUs).

❖ Scenario #4: Consider Environmental Hazards

The Environmental Hazards Scenario locates housing in areas with limited environmental hazards or in areas where impacts could be mitigated to address threats to life and property from these hazards. It identifies sites where technology, materials, and building methods could mitigate environmental hazards; prioritizes sites in areas having few impacts associated with climate change; and identifies sites with adequate routes for hazard evacuation. This scenario will be refined with additional analysis of environmental constraints and transportation capacity.



Attachment 4: Sites Outreach Summary

→ Community Workshops

Community workshops and events were conducted from the end of January through mid-February to offer communities an overview of the site strategies that were presented to the Board of Supervisors and Planning Commission at the December 7, 2021, hearing, and an opportunity to share opinion and ask questions.

Information was shared in English and Spanish and promoted across several platforms including County of Marin social media channels (Twitter, Facebook), NextDoor, and through community-based organization networks across the County. Meetings were recorded in English and Spanish and added to the Marin Housing and Safety Elements YouTube channel and website.

❖ Kickoff countywide sites workshop (January 20)

207 people registered for the event and 134 attended. The event was also livestreamed on YouTube where an additional 23 people viewed the meeting. Participants received an introduction to sites strategies and a demonstration of the Balancing Act tool. Attendees also participated in breakout rooms to offer opinions on the site strategies presented in the meeting.

❖ Community-specific sites updates (January 27 – February 17)

Over 450 people registered for these events and 360 attended. Participants received an overview of the housing site strategies and scenarios, a demonstration of Balancing Act, and the opportunity to review and ask questions about sites in the specific community.

Date	Location
January 26	Kentfield - hosted through Kentfield Planning Advisory Board (KPAB)
February 2	Tamalpais Valley - hosted through Tamalpais Design Review Board (TDRB)
February 7	Strawberry - hosted through Strawberry Design Review Board (SDRB)
February 9	Unincorporated Ross Valley
February 10	Marinwood and Lucas Valley
February 15	Marin City – hosted through Marin City Community Conversations
February 15	Los Ranchitos and Santa Venetia
February 16	West Marin
February 17	Unincorporated Novato

❖ **Presentations (February – April)**

County staff also presented an overview of site strategies, the Balancing Act tool, and took questions at a meeting hosted by the Marin Conservation League. Additional presentations are planned in March with the Marin County Office of Education to discuss the intersection of schools and the Housing Element, and in April with the Marin County Commission on Aging.

➔ **Online Tools**

Various digital tools were released to collect feedback and comments about the candidate sites. Weekly office hours were offered in February to provide the public an opportunity to ask specific questions about any of the tools.

All communications encouraged those unable to access or utilize the online tools to get in contact with County staff for the possibility of an in-person meeting or other accommodation. Additionally, the public was presented with the alternative to email comments to Staff, or to leave a voicemail.

❖ **Balancing Act (January 20 – February 28)**

An interactive tool that allows users to adjust proposed housing units as desired. The goals of the tool include:

- Helping the public understand the tradeoffs needed to meet the RHNA. When units are decreased on one site, they must be increased on one or more sites to maintain the balance of units.
- Gathering feedback about the preferred scenario(s).
- Gathering consistent feedback data about the sites, in addition to comments about specific sites.

Four Balancing Act scenarios were created utilizing the guiding principles approved by the Board of Supervisors and Planning Commission joint workshop on December 7, 2021.

These scenarios include:

1. Ensuring countywide distribution
2. Addressing racial equity and historic patterns of segregation
3. Encouraging infill and redevelopment opportunities
4. Considering environmental hazards

While all six adopted guiding principles are included within each scenario, each scenario highlights a specific principle. The Balancing Act scenarios are populated with 17¹ key housing sites (larger sites, sites with a substantial number of units, sites that may require re-zoning). The full list of sites was made available on the County's Housing and Safety

¹ Balancing Act contains 17 key sites that are available for adjusting proposed units. In total, 38 sites are available on the tool for comments.

Elements webpage as a pdf document, excel document, and interactive map, where the public could provide comments on all of the candidate sites and propose additional sites.

County staff also offered four office hours throughout February at various times, including February 1st from 5-6 PM, February 10th from 7-8 PM, February 15th from 7-8 PM and February 22nd from 5-6 PM. Spanish speaking staff were available at this meeting.

❖ **Housing sites suggestion and feedback map (January 10 – February 28)**

An interactive map that allows the public to offer suggestions about additional housing sites that have not yet been considered by the County. The map is also populated with the full list of candidate housing sites and serves as an alternative way for the public to offer comments about the candidate sites. The tool allows users to drop a pin on any address and add comments/photos to offer additional details about why they are suggesting the site. As of February 22nd, over 70 suggestions and comments have been collected through the map.

❖ **Atlas (February 11 – February 28)**

The interactive Atlas intended to help community members identify the most appropriate sites for new housing when taking into consideration environmental conditions, together with fair housing and equity objectives. Five maps are included:

- Candidate housing sites
- Community profile, including data related to demographics, income, opportunity areas, job proximity, and overcrowding
- Physical and community infrastructure, including the location of public facilities, major infrastructure, schools, and transit
- Hazards, including information about flood hazards, sea level rise, faults, and wildfire severity zones
- Natural resources, including data about protected open space, streams, and wetlands

➔ **Communications**

County staff have engaged in ongoing communication with the public by offering updates through GovDelivery bulletins to over 3,500 subscribers, updating registrants of the January 20th community workshop, communicating through Marin's community-based organization network, coordinating with Board Aides to share information about feedback opportunities through Supervisor newsletter, and coordinating with some cities and towns (Fairfax, San Anselmo) to distribute sites updates to their subscribers. Platforms such as Twitter, Facebook, NextDoor and YouTube have been utilized to disseminate information about the community meetings and online tools for input.

