

COMPANION UNIT HANDBOOK

City of San Diego | LISC | San Diego Housing Federation | Pacific Southwest Association of Realtors | ADU Coalition

INTRODUCTION TO COMPANION UNITS

California Senate Bill 1069 approved Planning and Zoning law that authorizes the ordinance for the creation of 2nd units in single-family and multifamily residential zones to include specified provisions regarding areas where accessory dwellings units may be located, standards, including the imposition of parking stands, and lot density. Existing law, when a local agency has not adopted an ordinance governing 2nd units as so described, requires the local agency to approve or the application via a ministerial process.

In conformance with State Law the City of San Diego allows Companion Units and Junior Units (2nd units) as a permitted use in single family and multi-family zones. This use is regulated by the Municipal Code as a Separately Regulated Use. The regulations are contained in Chapter 14 of the Municipal Code under Article 1, Division 3: Residential Use Category.

COMPANION UNITS DEFINED

These units are described by many names including Granny Flats and Accessory Dwelling Units. In San Diego, they're known as Companion Units. One Companion Unit is allowed on each single-family lot and may be as large as 1,200 square feet but if *attached* it may not exceed 50% of the primary dwelling unit's floor area. Only one Companion or Junior unit is allowed on a premise and may not be sold separately from the primary dwelling unit.



Unit Types

Attached - Companion Unit
Unit shares a wall with primary dwelling.



Detached - Companion Unit
Unit is separated from primary dwelling by a minimum of 6ft.



Within Primary - Junior Unit (JU) or Companion Unit (CU)
Unit uses existing habitable area within the primary dwelling.



INTRODUCTION TO COMPANION UNITS

HOW TO USE THIS HANDBOOK

This handbook was prepared at the request of the City of San Diego, the San Diego Housing Federation, LISC and the Pacific Southwest Association of Realtors to serve as a helpful guide to homeowners seeking to construct a companion unit on their property. The design and construction of any structure is a step by step process. Success often depends on preparation and a solid understanding of the process and a clear vision of the results you wish to accomplish.

When considering building or adding a companion unit on your own property, this handbook will help you understand:

- Your property's zoning and issues such as setbacks and parking.
- Companion unit design and construction.
- Permitting requirements.
- Funding
- Supporting documents and resources.

FREQUENTLY ANSWERED QUESTIONS ADDRESSED IN THIS HANDBOOK

This handbook answers many questions related to Companion Units:

- What is a Companion Unit and where is it allowed?
- What are the best sources for design of a Companion Unit?
- How does one make sure they're well prepared?
- What are some ideas and inspiration for the design of a Companion Unit?
- What's the construction and budgeting process?
- What are the costs, timing and financial sources?
- What are my property taxes?
- What's need for permitting and occupancy?
- Do I have to live on the property?
- Can I sell my Companion Unit?

PROCESS MAP



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WHO, WHAT, AND WHERE OF COMPANION UNITS

A

WHO

As a residential use, property owners may seek to build a Companion Unit or Junior Unit at their residential lot for a number of reasons. Primarily because a Companion or Junior Unit is a rentable unit that can be added to a single family home and in certain circumstances, a multi family residence.

WHAT

Companion Unit means an accessory structure on a residential lot that provides independent living facilities for one or more persons, independent of the primary dwelling unit, which includes permanent provisions for living, sleeping, eating, cooking, and sanitation. City of San Diego Municipal Code

BENEFITS

- Detached Companion Units allow the owner to add the most additional area, up to 1,200 SF.
- Can provide additional privacy between Companion Unit and primary dwelling.
- Primary dwelling does not need to be “owner occupied.”

Junior Unit means an accessory structure that is 500 square feet or less in size and is contained entirely within an existing, habitable single dwelling unit. The unit requires a separate exterior entry, with an interior connection to the main living area, and shall include an efficiency kitchen. City of San Diego Municipal Code 113.0103

BENEFITS

- No required parking, even outside of Transit Area
- Ability to add a unit even if site doesn’t have additional space to build on or the maximum FAR is already reached.

CONSIDERATIONS

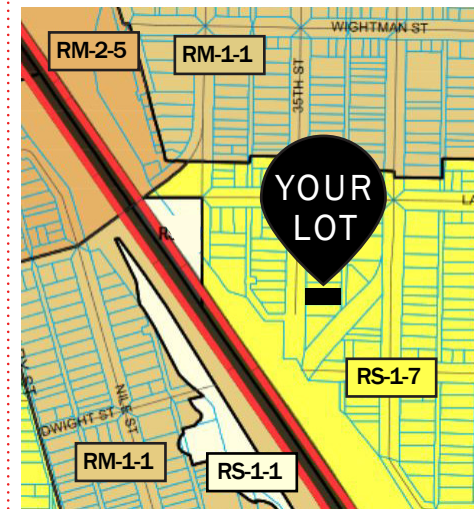
- Reduced privacy.
- Primary dwelling must be “owner occupied”

WHERE

Most residential lots in the urbanized areas of San Diego range from 5,000 – 6,000 square feet. Many residential lots are smaller or larger than this but are still allowed to include a Companion or Junior Unit. While this range of lot sizes is quite broad, it’s important to note that considerations other than zoning are important to consider, such as terrain and access. Zoning may allow a Companion or Junior unit, but the specifics of the property may present challenges.

The zoning designation of your property can be found at the City of San Diego’s website at:

<https://www.sandiego.gov/development-services/zoning>



NEED HELP?

For more assistance on determining zoning and feasibility, visit: aducoalition.org

¹ Dependent on the maximum number of allowed units.

WHO, WHAT, AND WHERE OF COMPANION UNITS

A

Applicable Zones

- Companion Units are allowed in all residential zones both single family (RE, RS, RX and RT) and multi-family (RM¹).
- Companion Units are also allowed in some Open Space zones (OR), Agricultural zones (AR) and Central Urbanized Planned District zone (CU), (see Mid-City Communities Plan and College Area Community Plan).
- Companion Units are not allowed in Industrial (I) or Commercial (C) zones.
- In areas impacted by Aircraft Noise, Companion Units are only allowed in areas that experience less than a Noise Exposure (db CNEL) of 60-65 decibels regardless of the zone (Table 132-15D).

Note 1: Process One approval is ministerial (building permit). There is no discretionary permit or development permit required except in the Coastal Zone

In the Coastal Zone, Municipal Code Chapter 12 Division 7, section 126.0704 "Exemptions from a Coastal Development Permit" does not exempt (a) (9) A companion unit as described in Section 141.0302.

Note 2: The designation of "L" in the Use Regulations Table for Residential Zones, Legend for Table 131.04B means:

Use is permitted with limitations, which may include location limitations or the requirement for a use or development permit. Regulations are located in Chapter 14, Article 1 (Separately Regulated Use Regulations).

UNIT USE AND MUNICIPAL CODE

UNIT USE

Companion units and junior units are each permitted as a limited use in accordance with Process One (see Note 1) in the zones indicated with an "L" (see Note 2) in the Use Regulations Tables in Chapter 13, Article 1 (Base Zones) and Chapter 15, Article 1, Division 4 (General and Supplemental Regulations), subject to the following regulations.

MUNICIPAL CODE

The City of San Diego has developed standards and approval processes to implement State law by amending Chapters 11, 12, 13 and 14 of the Municipal Code. The most pertinent and useful development standards can be found at:

<http://docs.sandiego.gov/municode/MuniCodeChapter14/Ch14Art01Division03.pdf>

Companion/Junior Unit Information Bulletin:

<https://www.sandiego.gov/sites/default/files/dsdib400.pdf>

Table 131.04B

<http://docs.sandiego.gov/municode/MuniCodeChapter13/Ch13Art01Division04.pdf#Page=7>

EXAMPLE CASE STUDY

Considering adding a unit to your property? Before you start, it's necessary to know what and where you can build. Below is an example which shows critical information such as property line setbacks and maximum building area. This information will guide the design of your unit.

A

Companion and Junior Unit Zoning Standards for Zone RS-1-7 *

Zoning	Typical RS-1-7 Requirements	Exceptions/Comments
Lot Size	5,000 SF (minimum), 50' Wide x 95' Deep	
FAR (Floor Area Ratio)	0.60	
Maximum Unit Size	CU; Attached: 500SF or Detached:1,200 SF Junior Unit: 500 SF	
Setbacks		
Side yard, one or two story	50' X 0.08 = 4 or 4 Feet (8% of lot width)	Encroachment rear and side yards ⁶
Side yard, corner lot	50' (lot width) X 0.10 = 5 or 5 Feet	
Front yard	15 Feet	
Rear yard, one or two story	95 X 10% = 9.5 or 9'-6" (lots less than 100', 10% of lot depth)	10% of lot depth, no less than 5 Feet ⁵
Maximum Height		
One story	15 Feet	Greater than 15' may impact gross floor area ¹
Two story	24 Feet	30 Feet with angled building envelope plane ²
Distance Between Buildings	3' from non-habitable structure (garage) 6' from habitable structure (main residence)	
Parking		
Required Spaces	1 Space Min. or 0.5 spaces per bedroom	Required parking may be exempt ³
Parking Location: With Alley	Access from alley required	Other configurations acceptable ⁴
Parking Location: Without Alley	Driveway, tandem, garage	
Companion Unit Entrance/Access	Separate exterior entrance	
Junior Unit Entrance/Access	Separate exterior entrance and connection to main living space	

*This is an example of a typical 5,000 SF lot in Zone RS-1-7. Refer to the Municipal Code for complete list of zones and ordinances.

Step 1 - Find Your Zone

<https://www.sandiego.gov/development-services/zoning>

Step 2 - Development Regulations

<http://docs.sandiego.gov/municode/MuniCodeChapter13/Ch13Art01Division04.pdf>

Step 3 - Separately Regulated Uses

<http://docs.sandiego.gov/municode/MuniCodeChapter14/Ch14Art01Division03.pdf>

¹ Refer to SDMC 113.0234(b)(4)(A)

² Refer to SDMC 131.0444

³ Refer to SDMC 141.0302(a)(8) and SDMC 141.0302(b)(1)

⁴ Refer to SDMC 141.0302(a)(7)

⁵ Refer to SDMC 131.0443(a)(2)(A)(i)

⁶ Refer to SDMC 141.0302(a)(5) and 141.0302(a)(6)

WHO, WHAT, AND WHERE OF COMPANION UNITS

Companion Units are defined in Chapter 14 of the San Diego Municipal Code. The following is from the Code which is subject to change.

COMPANION UNITS

ZONING AND SIZE

- (1) A companion unit may not be sold or conveyed separately from the primary dwelling unit.
- (2) Within a multiple dwelling unit zone, a companion unit is permitted on any premises that is limited to a maximum of two dwelling units based on the allowable density, existing area of the premises, and zone.
- (3) The gross floor area of the companion unit shall be included in the floor area ratio for the premises. The gross floor area for an attached companion unit shall not exceed 50 percent of the habitable dwelling unit. A maximum increase of 1,200 square feet is allowed for an attached or detached companion unit.
- (4) No passageway shall be required in conjunction with the construction of a companion unit.
- (5) A permitted garage or non-habitable accessory structure that is converted to a companion unit may maintain the existing setbacks if the setbacks are determined to be in compliance with the current California Building Code and California Fire Code at the time of the conversion.

- (6) A companion unit may encroach within the side and rear yard setbacks up to the property line subject to the following:

- (A) A one-story structure shall not encroach more than a maximum of 30 feet in length;
- (B) A companion unit may be constructed above a permitted garage or non-habitable accessory structure.

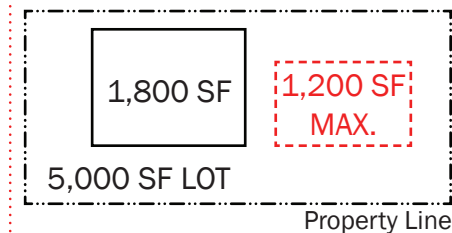
LANDSCAPING

- (7) One 24-inch box tree shall be planted in the required front yard of the premises or in the abutting parkway. Existing trees that are at least 15 feet high and 15 feet in width may be used to satisfy this requirement.
- (8) Within the Coastal Overlay Zone, companion units are subject to the provisions of Chapter 12, Article 6, Division 7.

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Companion Unit Diagrams

Detached Unit



Floor Area Ratio for lot = 0.6

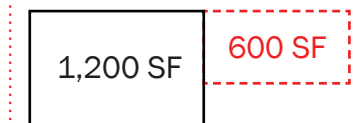
$$\text{Existing: } \frac{1800 \text{ SF}}{5000 \text{ SF}} = 0.4 \text{ FAR}$$

$$\text{New: } \frac{3000 \text{ SF}}{5000 \text{ SF}} = 0.6 \text{ FAR}$$

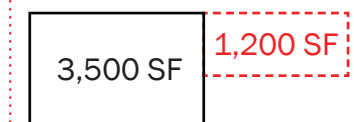
Therefore you can add up to 1,200 SF of habitable space.

Attached Unit

Up to 50% of main dwelling



Max 1,200 SF



WHO, WHAT, AND WHERE OF COMPANION UNITS

A

PARKING REQUIREMENTS

(9) Parking for the entire premises shall be brought into compliance with Chapter 14, Article 2, Division 5 (Parking Regulations) and with this section, except as otherwise indicated herein by the zone.¹

(A) If access from an improved abutting alley exists, vehicular access to parking spaces for the companion unit shall also be from the alley unless the premises has a garage that accommodates all off-street parking required in accordance with this section, except for premises located in the Beach Impact Area or any other zones in which vehicular access from the alley is required.

(B) Replacement parking shall be provided on the premises when an existing garage is converted to a companion unit or demolished in conjunction with the construction of a companion unit.

(C) Off-street parking space(s) may be located in any configuration, may be within the setback areas, and may include covered or uncovered parking tandem spaces, or mechanical lifts. Off-street parking space(s) shall be located within hardscape areas and shall comply with the minimum standards and guidelines to provide safe and efficient means of vehicular access to the lot.

(D) Required off-street parking space(s) for a companion unit shall be provided at a ratio of 0.5 parking space per bedroom, with a minimum requirement of one parking space per companion unit.

PARKING EXEMPTIONS

(10) A companion unit shall be exempt from providing parking if any of the following apply:

- (A) The companion unit is 500 square feet or less;
- (B) The companion unit is located within a transit area or a transit priority area;
- (C) The companion unit is located within a designated historical resource area;
- (D) The companion unit is already part of the existing single dwelling unit or an existing permitted habitable dwelling unit (Junior Unit).
- (E) The companion unit is located within a residential permit parking district;
- (F) The companion unit is located within one block of a car share station; or
- (G) The companion unit is located within one block from a bike share station.



Bike Share Station



Personal Car Lift

¹ Parking Regulations can be found at:

<http://docs.sandiego.gov/municode/MuniCodeChapter14/Ch14Art02Division05.pdf>

WHO, WHAT, AND WHERE OF COMPANION UNITS

A

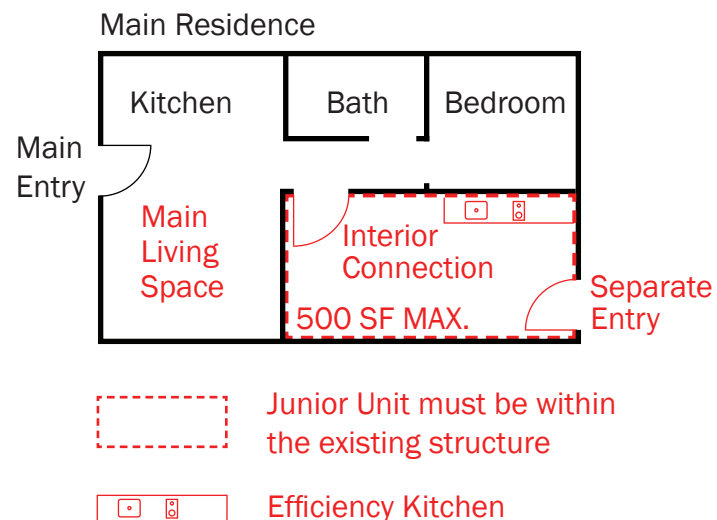
Junior Units are defined in Chapter 14 of the San Diego Municipal Code. The following is from the Code which is subject to change.

JUNIOR UNITS

- (1) A Junior Unit shall be exempt from parking regulations.
- (2) A junior unit shall have a separate exterior entry, with an interior connection to the main living area, and shall include an efficiency kitchen. An efficiency kitchen requires a sink with a maximum waste line diameter of 1.5 inches, a cooking facility with appliances that do not require electrical service of more than 120 volts, or use natural or propane gas, and food preparation counter and storage cabinets.
- (3) A junior unit may include a bathroom or may share a bathroom with the primary dwelling unit.
- (4) Before a Building Permit may be issued for a junior unit, the record owner shall enter into an agreement with the City in a form that is approved by the City Attorney. The agreement shall include the following provisions: that neither the primary dwelling unit nor the junior unit may be sold or conveyed separately from each other; and that the record owner shall reside in the primary dwelling unit or the junior unit. The City will submit the agreement to the County Recorder for recordation. The agreement shall run with the land and be coterminous with the life of the junior unit.

- (c) Only one companion unit or junior unit is permitted on a premise. Guest quarters and non-habitable structures shall be permitted in addition to the companion unit or junior unit. All structures shall comply with building spacing requirements in accordance with Section 131.0450.
- (d) A companion unit or junior unit shall not be used for a rental term of less than 30 consecutive days.

JUNIOR UNIT DIAGRAM



How can a homeowner achieve a Companion or Junior Unit? In the City of San Diego, a licensed professional is not necessary to design and permit a Companion or Junior Unit. While a licensed Architect can add great deal to the design, efficiency and community compatibility their service is not required by law.

APPROACHES

B

Generally, the three approaches below are the most practical:

APPROACH 1 | CUSTOM DESIGN

- (1) A homeowner can decide on an example plan and engage an architect to detail and process the plans to permit. By selecting an example, the homeowner is getting a “head start” on the process by evaluating alternative approaches first and then potentially customizing and detailing the plan to their specific needs with the advice and skill of an architect.
- (2) Some homeowners have the skills to design and detail a unit themselves or with minimal assistance. There are few examples of this approach that have been successful, but it is a distinct possibility. A starting point for this approach could be via selecting an example from this document or others.
- (3) A homeowner can engage a designer or an architect to design a custom Companion Unit, provide construction plans and process the building permit. Currently there are several architects that have chosen to focus on providing design and permit processing services to homeowners who want to build a Companion or Junior unit on their property. These professionals have the experience and skill to work with each home owner’s needs and site for a creative and practical outcome.

APPROACH 2 | STANDARD DESIGN

Currently some plans are being drafted and reviewed by the City of San Diego for pre-approval of both the design and structure sufficient for building permitting. Certain site specific technical reviews will still be necessary, but this approach does significantly streamline the process. An increased level of certainty and control is also a benefit of this approach. The ADU Coalition in San Diego will provide a “catalog” of available plans from various sources that have been preapproved by the City of San Diego. Along with state preapproved units that are also able to be expedited through permitting. These plans and units will be available on their web site soon.

APPROACH 3 | PREFABRICATED

Quite a few factory-built Companion Unit designs are available for consideration. Even though the foundation, utilities and other aspects of the site will need to be prepared before delivery of the unit, the certainty of cost and time may be desirable. The companies building these units may be found Online through your browser or in the catalog available at www.aducoalition.org



IMPORTANT CONSIDERATIONS



NEIGHBORHOOD

Community character will determine how compatible the unit will be with the neighborhood. There is no need to copy the architectural style of the surrounding homes, but there should be attention paid to the scale, materials and overall design character of the proposed unit. Just the incorporation of design elements and landscape can often achieve the desired result. It's important to discuss your plans with your neighbors to achieve their support and input. A few ideas to achieve neighborhood compatibility.

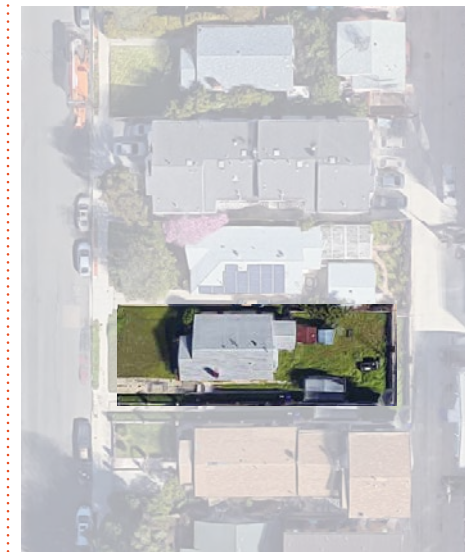


PATTERNS – most every neighborhood has a discernible pattern of homes and outbuildings. You can determine this via Google maps. Try to locate your companion unit to coordinate with building to street relationships, walkway and drive patterns and landscape patterns.

MASSING+OUTDOOR SPACE – consider the overall mass of your companion unit in relation to the primary residence. There's no need for them to match but the massing of the two structures should be complementary to one another and result in usable and attractive spaces between them.

DESIGN+MATERIALS – consider the overall use of materials, window patterns, roof lines, front door positioning, color and features such as porches and how these relate to the primary residence and adjacent/surrounding homes.

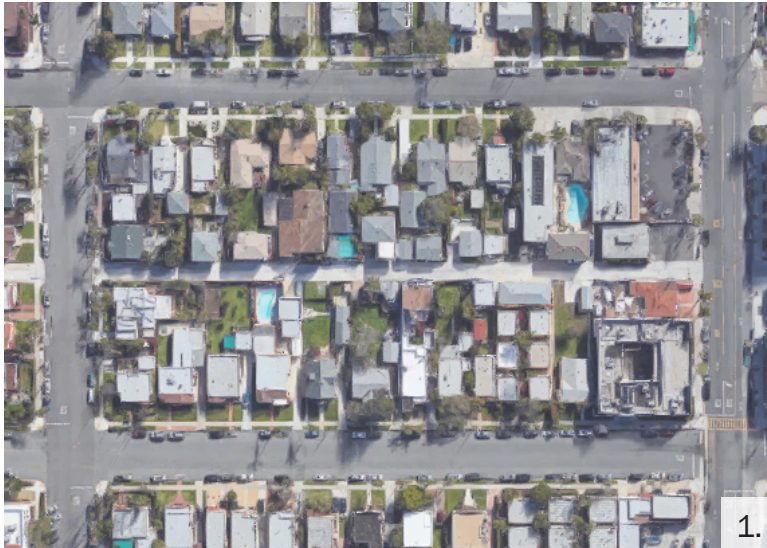
LANDSCAPE – often the most distinctive feature of a neighborhood is an overall landscape pallet and pattern. Try not to interrupt this valued design feature. Plant materials, sizing and location are all part of creating neighborhood character and compatibility.



Try to Locate Your Property at:
<https://www.google.com/maps>

PATTERNS

MASSING + OUTDOOR SPACE



1.



3.



2.



4.

PATTERNS

1. Traditional block organized on a grid, including an alley, circa 1900. Also known as a “pre-war” neighborhood plan.
2. Curvilinear loop design including cul-de-sacs, circa 1940. Also known as a “post-war” neighborhood plan.

MASSING AND OUTDOOR SPACE

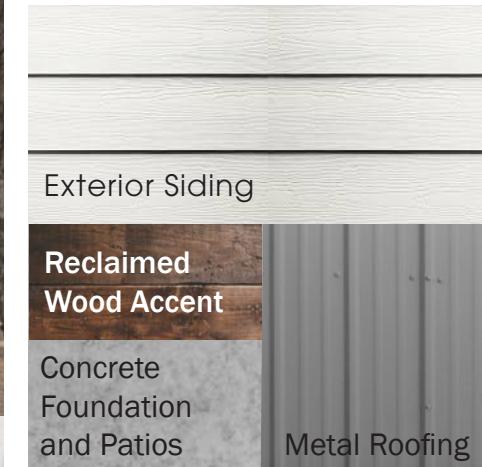
3. Pictorial yard/garden with detached Companion Unit. Consider open space, access to and around CU, and neighboring conditions.
4. Density and massing of structures within the lot and within the neighborhood.

LANDSCAPE

MASSING + MATERIALS



Example Material Palette



1. Example streetscape, character defined by seasonal foliage and lush greenery.
2. Landscape master plan identifying green/open area and tree locations.
3. Example of Companion Unit with material palette matching the main residence.
4. Consider bulk and scale of main residence and Companion Unit relative to neighboring properties and streetscape.

IMPORTANT CONSIDERATIONS

Considering the fact that your companion unit will likely be of a unique design, the time required depends on the process. This generally involves three distinct phases: design, permitting and construction. The approach chosen (custom design, pre-approved design or manufactured unit) will have differing costs and time associated with them. Engaging your team including a general contractor, will help determine both time and cost.

ARE YOU A LANDLORD?

Having a second unit on your property can offer the benefits of additional income or a place for a family member or friend to live. Making sure the tenant you accept is reliable and can afford the rent is of major importance. It is advised to require a financial statement along with a signed lease (a lease can be found on-line or through a lawyer or real estate agent). Also, you will be responsible for certain maintenance matters and your tenant will be responsible for others. This distinction should be established at the outset and followed throughout the period of the lease.

Other considerations include the tax implications, insurance, and managing the property. Once the unit receives occupancy, the water meter rate will be switched to a "multi-unit" rate.

PRIVACY

Depending on who your tenant may be; family member, friend or new acquaintance it's best to make sure your privacy and that of your tenant is considered as you and your team design your new Companion Unit. Considerations of window placement, site placement and patio spaces should be made with privacy in mind. Also, consideration of fences or landscape that create private use areas is a good idea.

GREEN DESIGN

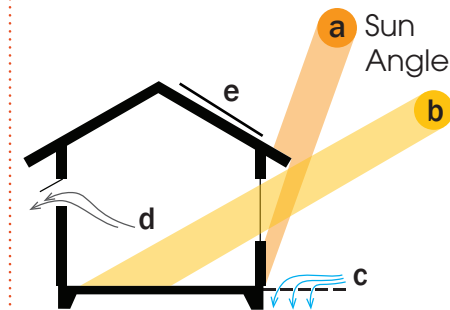
There are State requirements regarding energy efficient design but generally reducing the need for power and water is the foundational principle of green or sustainable design. Good insulation, water saving fixtures, power saving appliances and water saving landscape are all steps in the direction of a sustainable design for your Companion Unit. If your budget allows and your site has good access to sun light, photovoltaic panels will help reduce power consumption by providing a natural source of electricity to augment use.

UNIVERSAL DESIGN

In order to make sure your new Companion Unit is accessible to all future tenants; universal design is a concept to consider. Universal design involves path of travel from the property to the unit and inside the unit to support wheelchair and walker access. It also provides the needed supporting design elements of plumbing fixture. Light switch and appliance accessibility for those with handicaps. Certainly, if you intend to occupy the Companion Unit yourself in the future these considerations should be included in the unit design.



Passive Heating/Cooling and Water Retention



- a. Summer Shading
- b. Winter Heating
- c. Permeable Landscaping
- d. Air Movement
- e. Solar Panels (PV)

Universal Design

Follow the link below for additional information:

<https://safescore.org/checklists>



Itellmy clients,“TheresusuallyaCompanion Unit that will work on your lot, but it may not be the one you are thinking of.”

- Basis Studio

DESIGN

D

SITE CONDITIONS

A successful design is the starting point for every homeowner taking part in this program. To be successful the project design must be built on a solid “foundation” that includes considerations about the appropriateness of the selected site, the suitability of the type of unit selected and compatibility with surrounding community character.

IDEAS

The most appropriate sites are those that have under utilized space, whether in the yard or in the existing structure. Consider access, sites that front on an alley or a side street each of which can provide adequate access. Other configurations are possible of course but may require a wider street frontage for driveway access for example. Unique sites, such as those with steep slopes or other natural features often present challenges for the siting of a Companion Unit but could work well for a Junior Unit.

Site Compatibility



- A. Maybe - Build over garage, build small/ medium detached unit, or convert garage.
- B. Maybe - Site has many existing out buildings, maybe a Junior Unit or garage conversion?
- C. Yes - Build over garage, convert garage, attached or detached unit.
- D. Yes, but the legal lot must have an existing single-family residence, the Companion Unit would be constructed concurrently with main dwelling.
- E. Maybe - Existing accessory unit on lot. Typically one* Companion Unit per lot.

*Depending on zoning, you may be able to add a Companion Unit even with two existing units.



150 - 250 SF
JU/Studio | 1 Bath



250 - 450 SF
1 Bedroom | 1 Bath



500 - 900 SF
1-2 Bedroom | 1-1.5 Bath



1,200 SF
3 Bedroom | 2 Bath



COMPATIBILITY

A successful design is the starting point for every homeowner taking part in this program. To be successful the project design must be built on a solid “foundation” that includes considerations about the appropriateness of the selected site, the suitability of the type of unit selected and compatibility with surrounding community character.

SIZING

Whether a homeowner selects an example from this or another handbook depends on preference. The value of the handbook examples however, allow the homeowner to explore options such as one or two stories, bedroom on not, type of kitchen and other elements such as porches. Often, just selecting an example can help a homeowner *program* the unit’s spaces and characteristics in anticipation of engaging a professional architect or designer to create a custom unit based on needs and desires that have been identified.

Program

The research and decision-making process that identifies the scope of work to be designed.

UNIT PLACEMENT DIAGRAM | WITH ALLEY

D

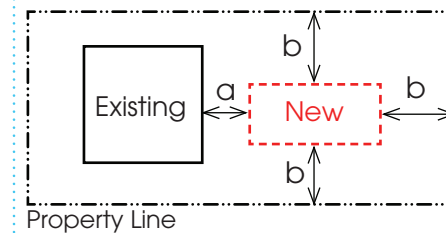
Setbacks

Detached Unit






- 3' from uninhabitable space OR 6' inhabitable space.

Attached or Detached Unit

- 0'-30' Depending on zone, type of construction, and use of encroachments.



UNIT PLACEMENT LEGEND

-  150-350 Square Feet Unit
-  500 Square Feet Unit
-  900 Square Feet Unit
-  1,200 Square Feet Unit
-  Existing Dwelling



SITE CONDITIONS WITH ALLEY

D

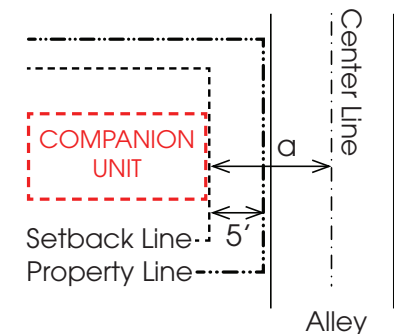
① 2 Story CU requires a 5' setback from side and rear lot lines.

⑥ Parking and Access

Existing improved alley shall be used to access Companion Unit, specific zone requirements may vary.

Rear Yard Setback

a. Half the width of the alley (10' Max.) can count toward your rear yard setback, 5' set back minimum.



DESIGN

15

Keynote Legend:

- ① New Detached Companion Unit
- ② Existing Portion to be Converted-Junior Unit
- ③ Existing Garage to be Converted
- ④ New Companion Unit Above Existing Garage
- ⑤ New Attached Companion/Junior Unit
- ⑥ Alley (see Parking and Access)
- Existing Structures
- Existing Structures to be Converted
- New Companion/Junior Units

UNIT PLACEMENT DIAGRAM | WITHOUT ALLEY

D



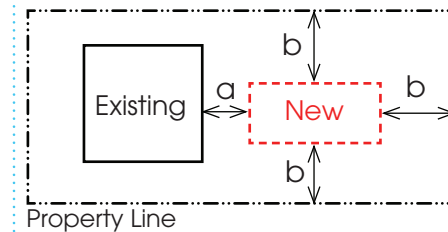
Setbacks

Detached Unit

- a. 3' from uninhabitable space OR 6' inhabitable space.

Attached or Detached Unit

- b. 0'-30' Depending on zone, type of construction, and use of encroachments.

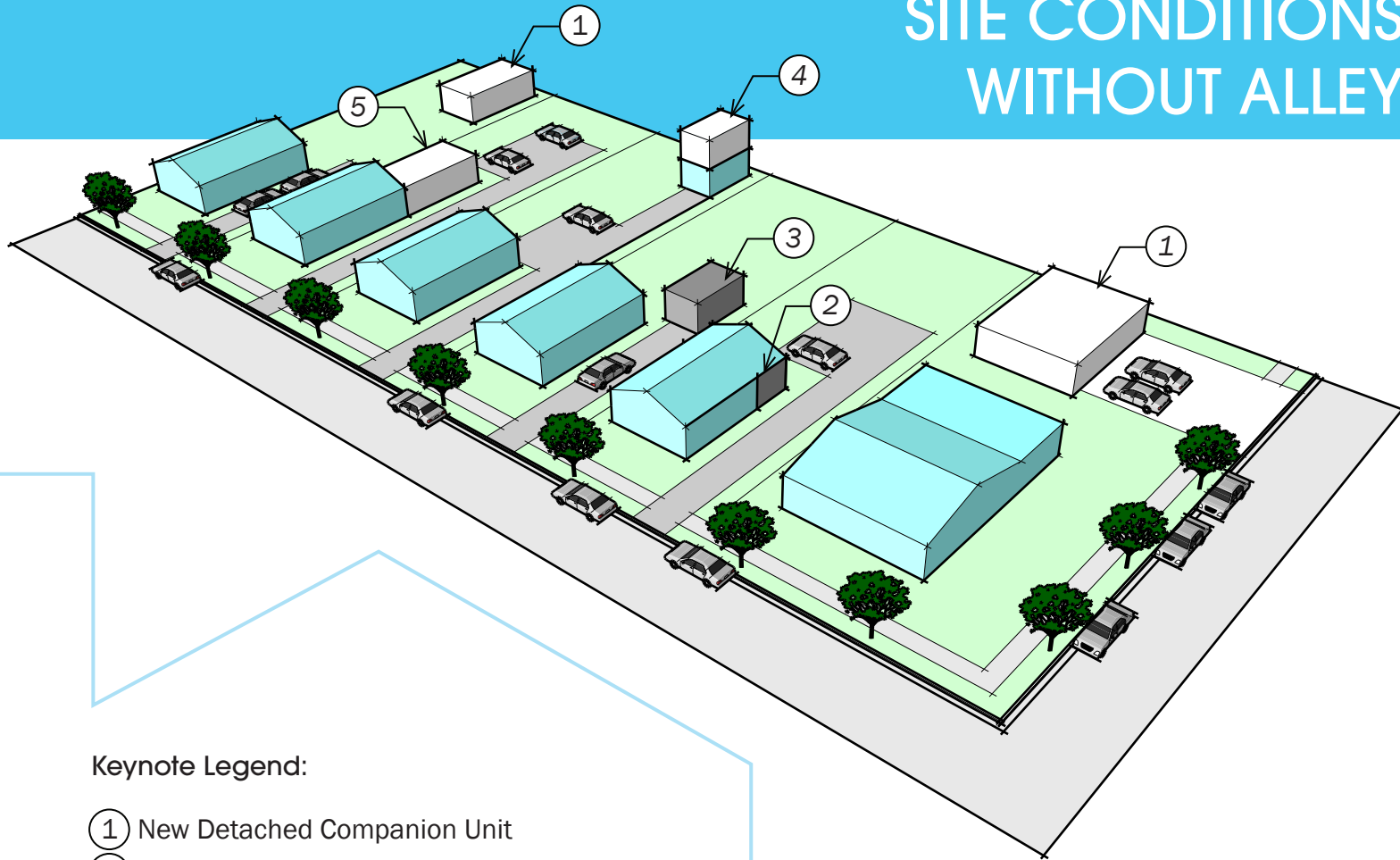


UNIT PLACEMENT LEGEND

- 150-350 Square Feet Unit
- 500 Square Feet Unit
- 900 Square Feet Unit
- 1,200 Square Feet Unit
- Existing Dwelling

SITE CONDITIONS WITHOUT ALLEY

D



- ③ Existing off-street parking will need to be replaced in any acceptable configuration on lot.

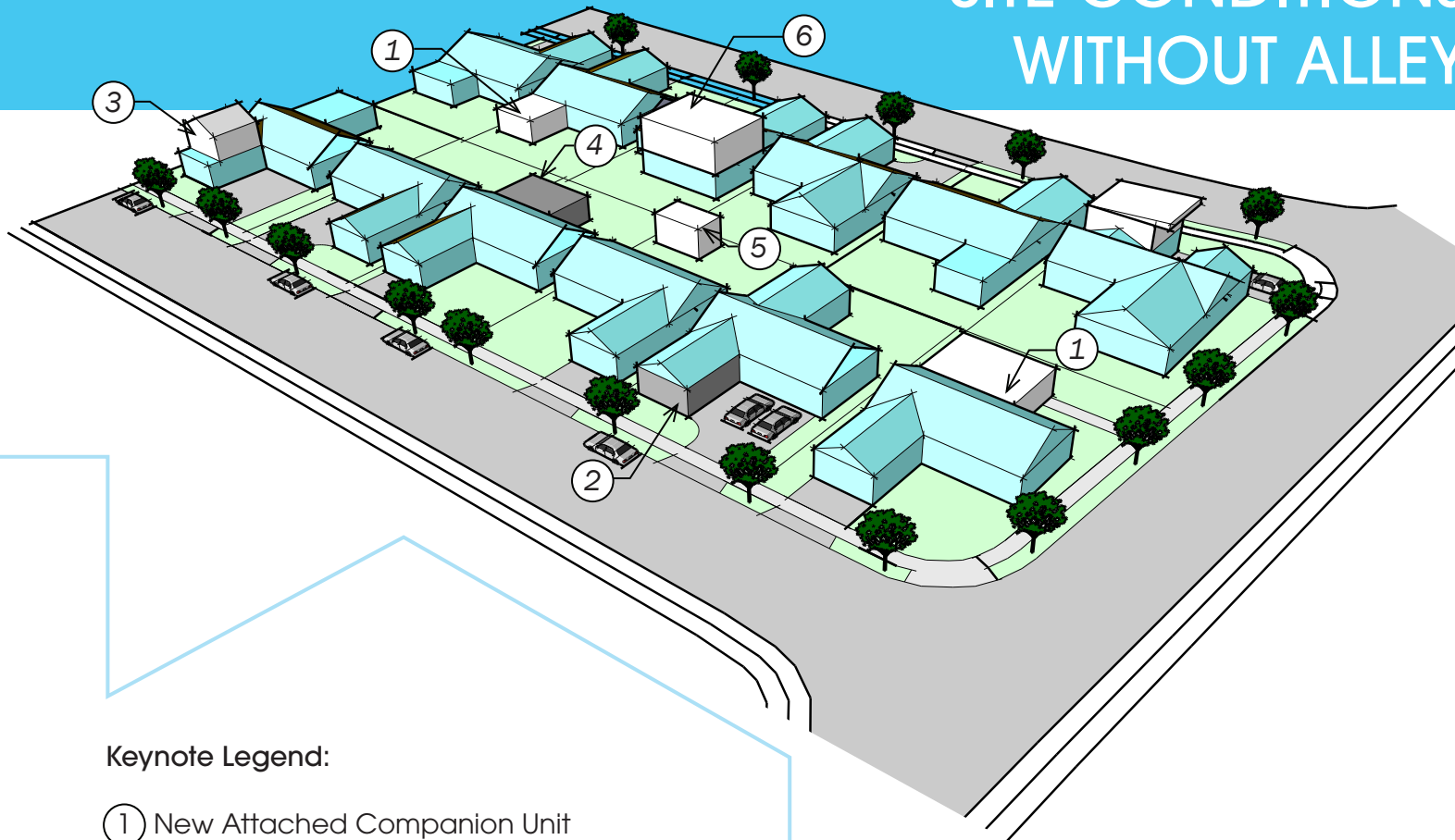
Keynote Legend:

- ① New Detached Companion Unit
- ② Existing Portion to be Converted
- ③ Existing Garage to be Converted
- ④ New Companion Unit Above Existing Garage
- ⑤ New Attached Companion Unit

- Existing Structures
- Existing Structures to be Converted
- New Companion/Junior Units

SITE CONDITIONS WITHOUT ALLEY

D



① Attached Unit

Maximum of 1,200 SF or %50 of the primary dwelling area, whichever is less.



② Garage Conversion

Existing off-street parking will need to be replaced in any acceptable configuration on lot.

④ Junior unit

A maximum of 500 SF can be converted to a Junior Unit.



Keynote Legend:

- ① New Attached Companion Unit
- ② Existing Garage to be Converted
- ③ New Companion Unit Above Existing Garage
- ④ Existing Portion to be Converted/Junior Unit
- ⑤ New Detached Companion Unit
- ⑥ New Companion Unit Above Existing Structure

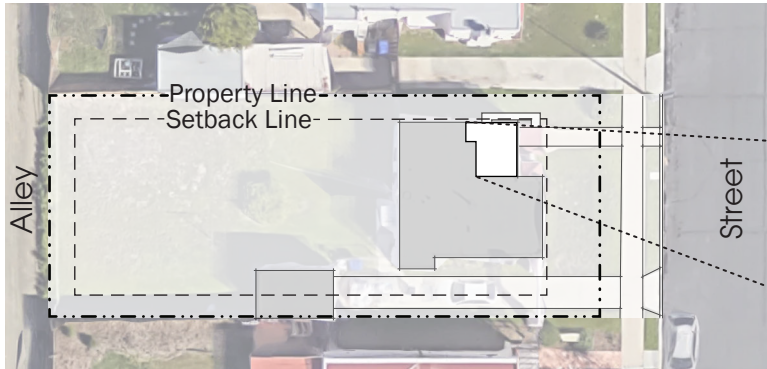
- Existing Structures
- Existing Structures to be Converted
- New Companion/Junior Units

Did You Know?

A Junior Unit does not require additional parking to be provided.

DESIGN

D



Site Context



SOME IDEAS TO EXPLORE:

1. Junior Unit requires a separate exterior entrance.
2. Build out an existing bedroom or space.
3. A sink is required; consider location of sink and required plumbing.

XSmall

EXAMPLE

Lot Size

JUNIOR UNIT

50' x 100'

Unit Size

150 Square Feet

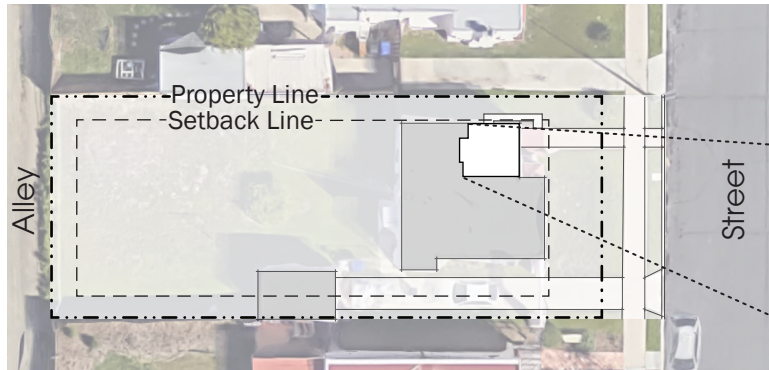
0 1 2 4 8 Feet

Did You Know?

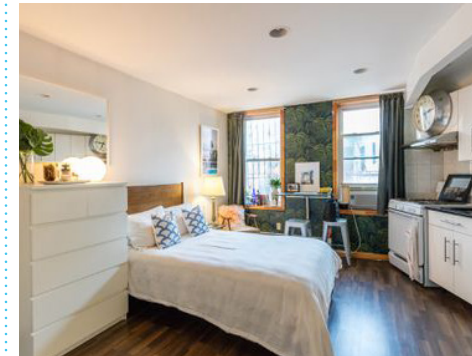
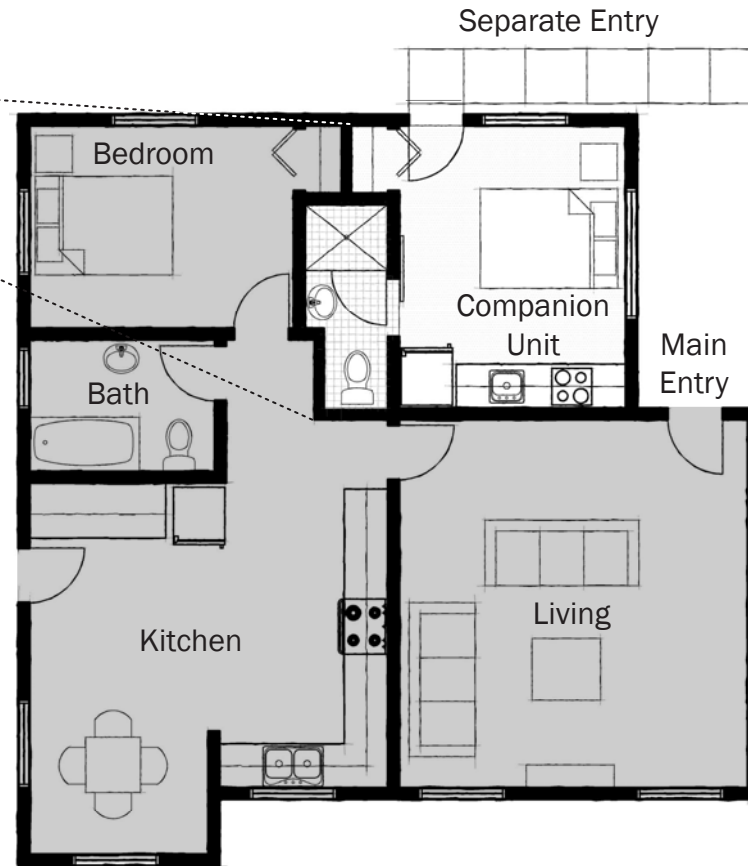
A Companion Unit can be within the primary dwelling; a separate entrance, full bath, kitchen, and sleeping area must be provided.

DESIGN

D



Site Context



SOME IDEAS TO EXPLORE:

1. Partially or fully convert an existing closet to full bath.
2. Access from unit to primary dwelling will need to be removed.

XSmall

EXAMPLE	COMPANION UNIT
Lot Size	50' x 100'
Unit Size	175 Square Feet

0 1 2 4 8 Feet

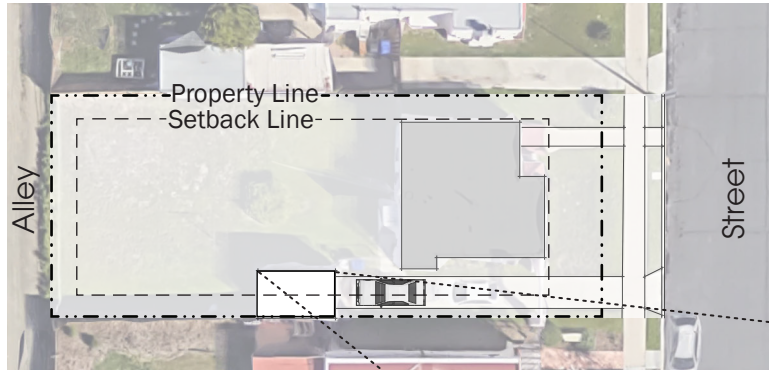
Did You Know?

Your front property line does not always start at the backside of the sidewalk. Submit to San Diego Development Services the "Curb to Property" form DS-689 to accurately locate your property lines.

<https://www.sandiego.gov/sites/default/files/legacy/development-services/pdf/industry/forms/ds689.pdf>

DESIGN

D

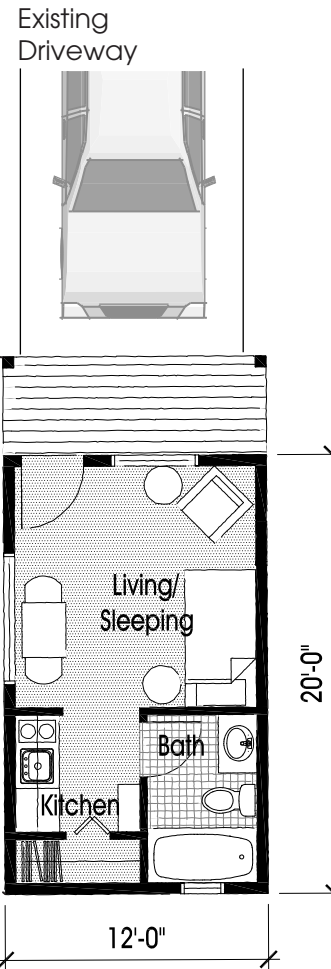


Site Context

XSmall

EXAMPLE	GARAGE CONVERSION
Lot Size	50' x 100'
Unit Size	240 Square Feet
	Studio - 1 Bath

0 1 2 4 8 Feet

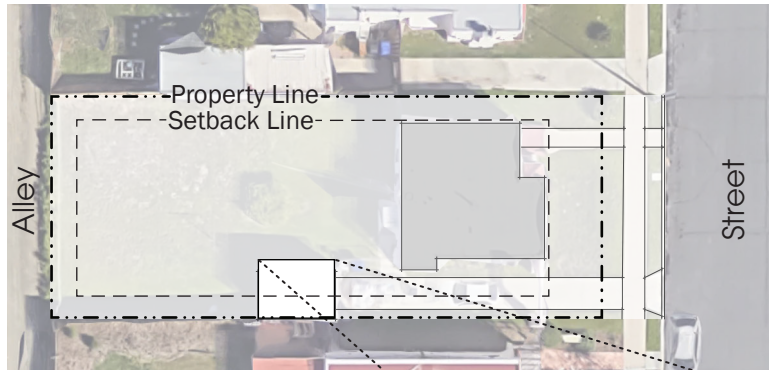


SOME IDEAS TO EXPLORE:

1. Build out a single car garage or a portion of your garage.
 - a. The off-street parking will have to be replaced. Driveway/ tandem parking is acceptable.
2. Build this as a free standing cottage.
3. Build this over your garage.

DESIGN

D



Site Context

Small

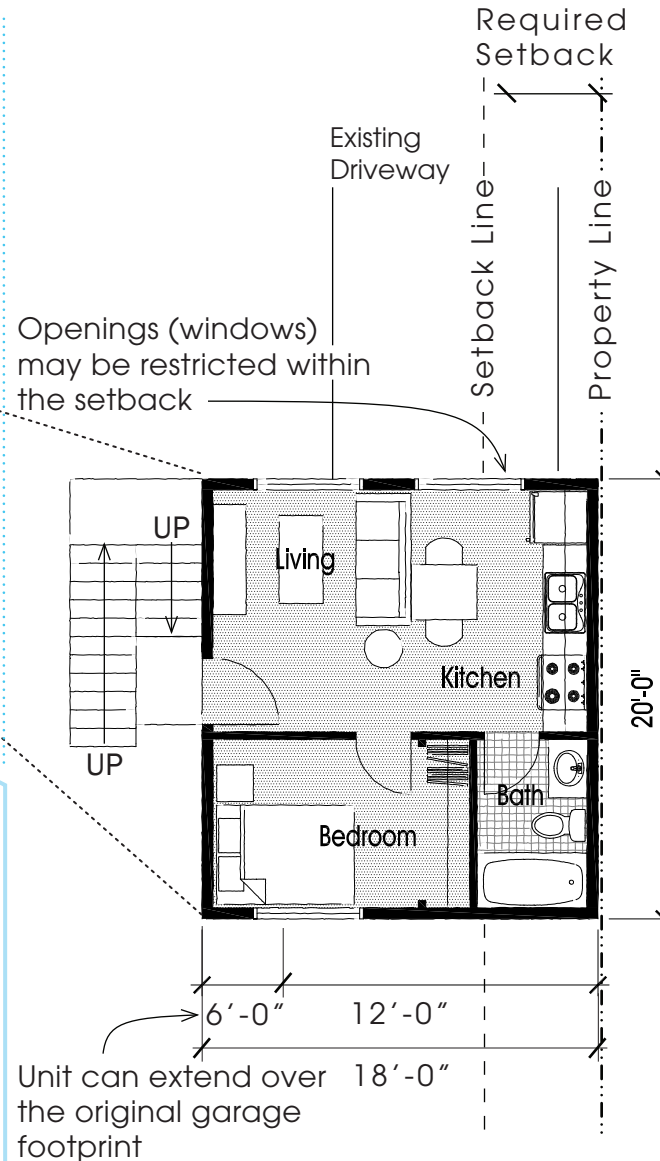
EXAMPLE

Lot Size
Unit Size

ABOVE GARAGE

50' x 100'
360 Square Feet
1 Bedroom - 1 Bath

0 1 2 4 8 Feet



SOME IDEAS TO EXPLORE:

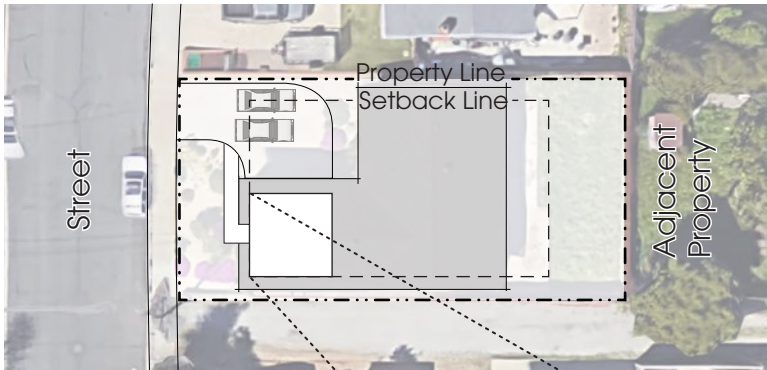
1. Build this as a free standing cottage.
2. Convert your two car garage to look like this.
 - a. Off-street parking will need to be replaced.
3. Build this over your garage.
 - a. The second story can utilize the same footprint of the garage or extend beyond it within the setback.

Did You Know?

Garage conversions require the off-street parking (parking inside the garage) be replaced. Tandem parking and other configurations are acceptable

DESIGN

D

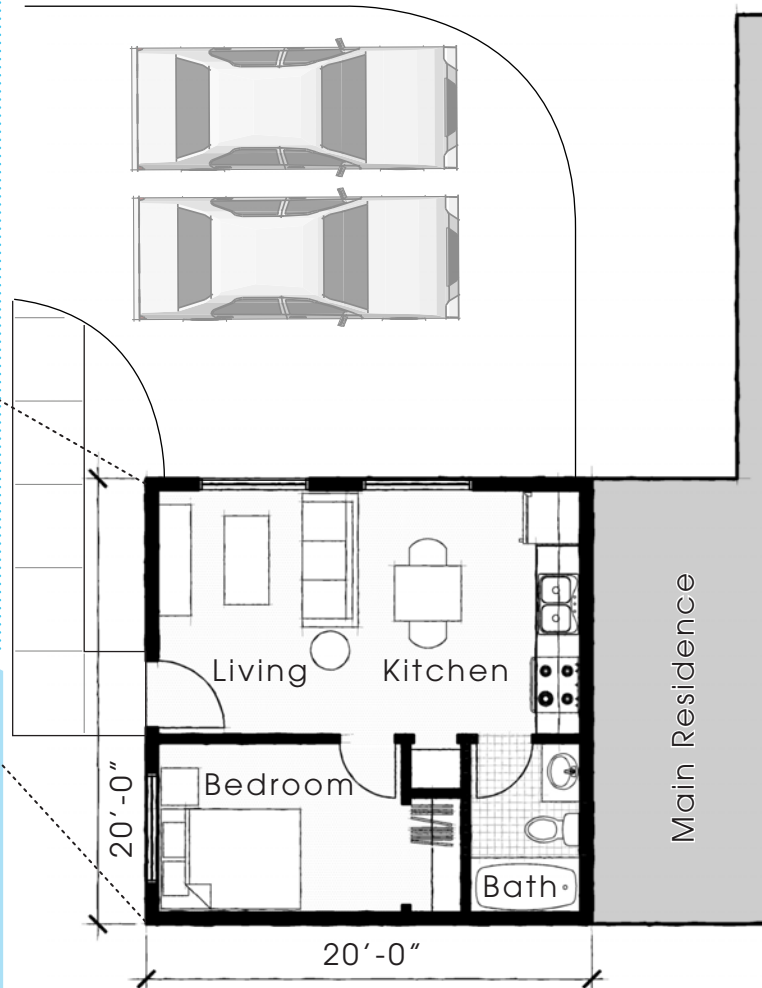


Site Context

Small

EXAMPLE	GARAGE CONVERSION
Lot Size	50' x 100'
Unit Size	400 Square Feet
	1 Bedroom - 1

0 1 2 4 8 Feet

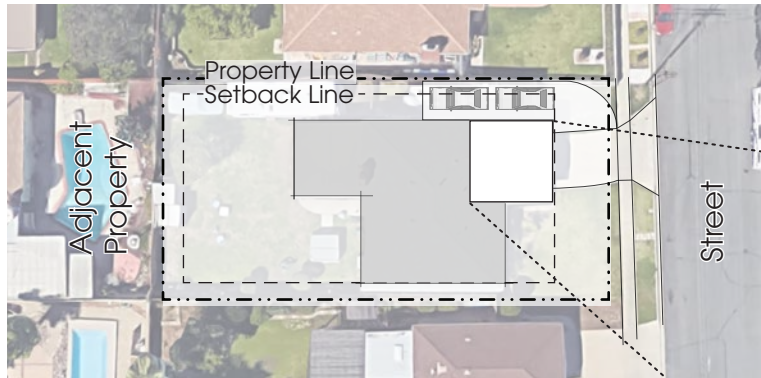


SOME IDEAS TO EXPLORE:

1. Consider existing utilities and connections to new
2. Consider location and access to new private exterior entry.
3. If conversion is larger than 500 SF, an additional parking space may need to be provided.

DESIGN

D

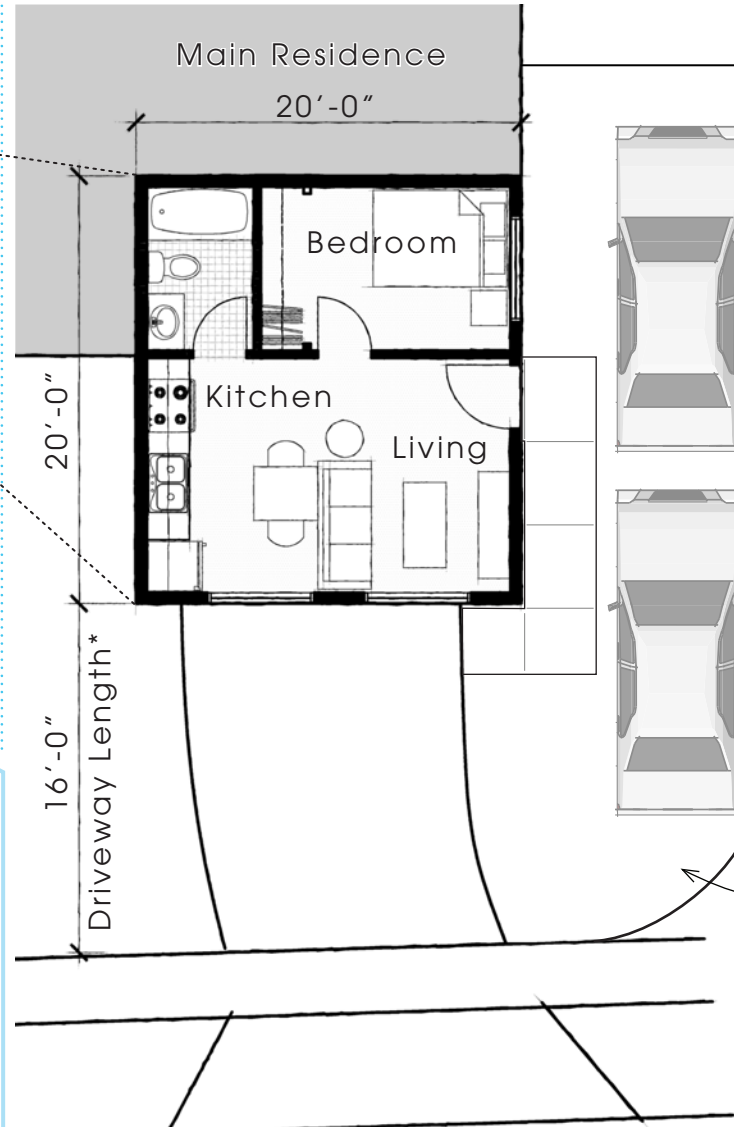


Site Context

Small

EXAMPLE	GARAGE CONVERSION
Lot Size	50' x 100'
Unit Size	400 Square Feet
	1 Bedroom - 1

0 1 2 4 8 Feet



SOME IDEAS TO EXPLORE:

1. Garage conversion requires off-street parking, driveway length must be 20 Feet minimum.

*If driveway length is less than 20 Feet, consider Junior Unit or alternate parking solutions.

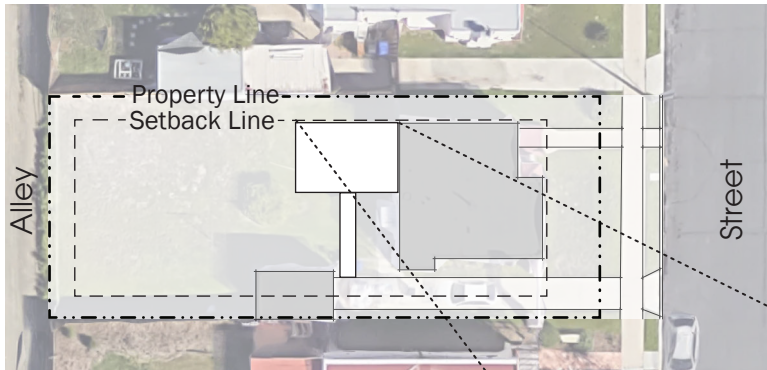
New paving for parking spaces and or unit access.

Did You Know?

Companion Units located within one block of a bike or car share are exempt from the parking requirement.

DESIGN

D



Site Context

Medium

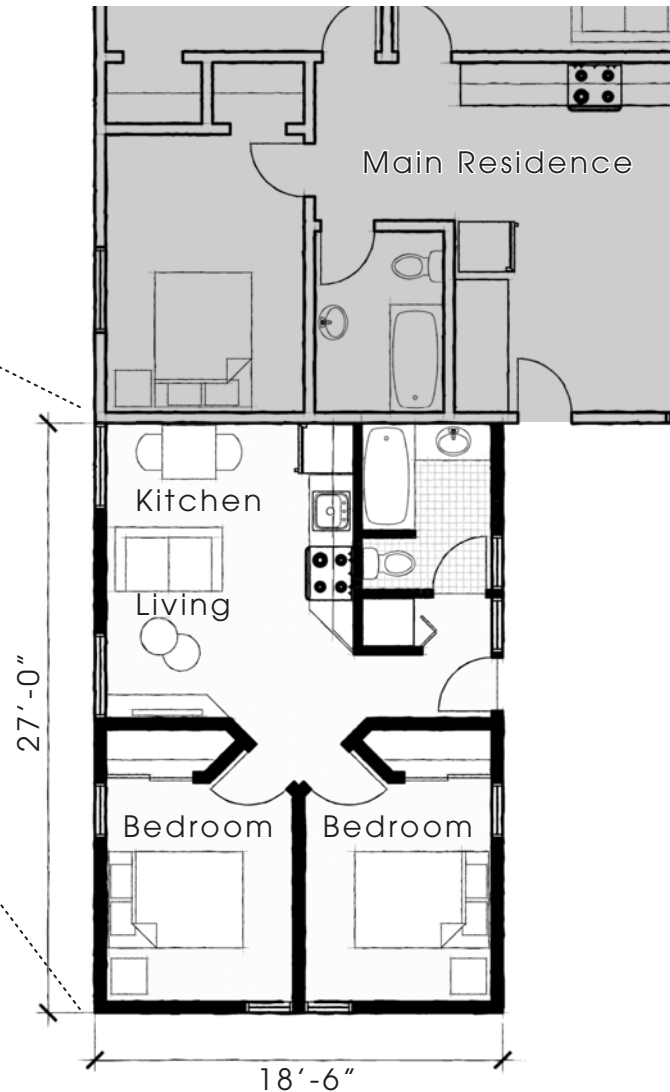
EXAMPLE

Lot Size
Unit Size

ATTACHED UNIT

50' x 100'
500 Square Feet
2 Bedroom - 1

0 1 2 4 8 Feet



SOME IDEAS TO EXPLORE:

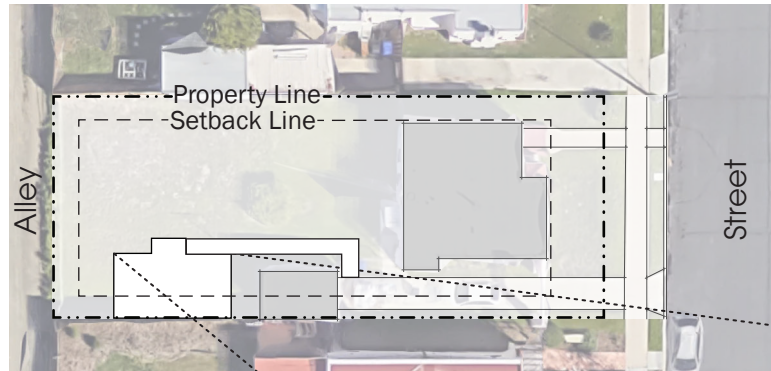
1. Consider existing utilities and connections to new unit.
2. Consider access and privacy from main residence.
3. 500 SF or less does not require additional parking.

Did You Know?

Construction of 500 SF or less will not incur "school fees."
See City of San Diego - Info Bulletin 146

<https://www.sandiego.gov/sites/default/files/dsdib146.pdf>

DESIGN



Site Context

Medium

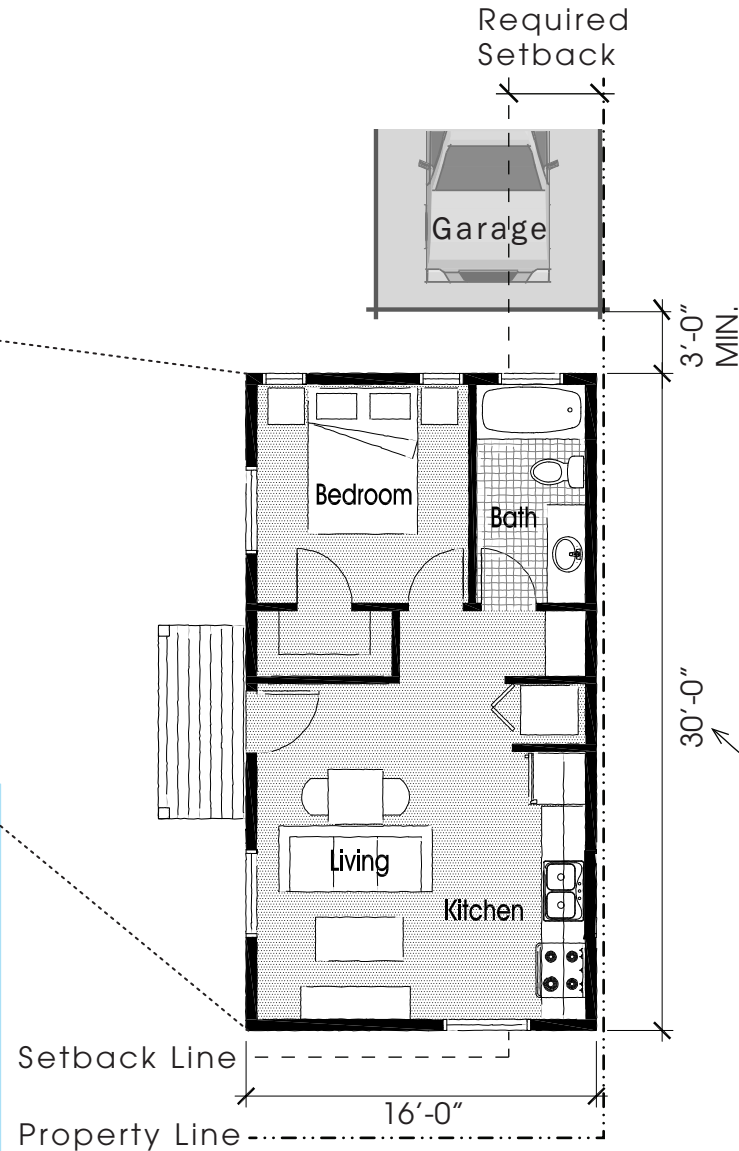
EXAMPLE

Lot Size
Unit Size

DETACHED

50' x 100'
480 Square Feet
1 Bedroom - 1 Bath

0 1 2 4 8 Feet



SOME IDEAS TO EXPLORE:

1. Build this as a free standing cottage.
2. 500 Square Feet or less does not require additional parking.

NOTE:

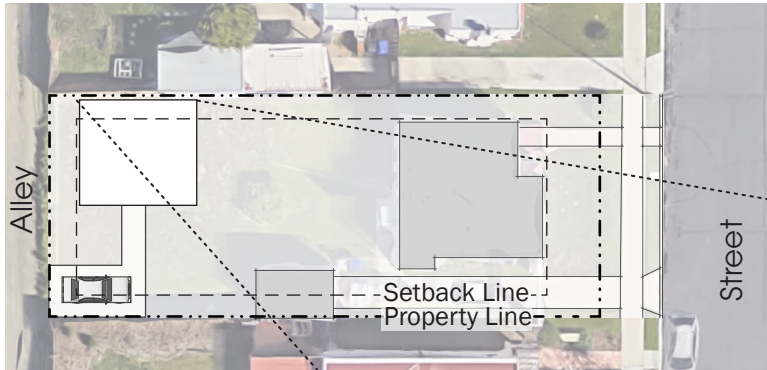
1. 30'-0" Maximum encroachment for single story structure.
2. Windows are allowed within 2'-0" of Property Line, size and fire rating will vary.

Did You Know?

Companion Units located within one block of a bike or car share are exempt from the parking requirement.

DESIGN

D



Site Context

Medium

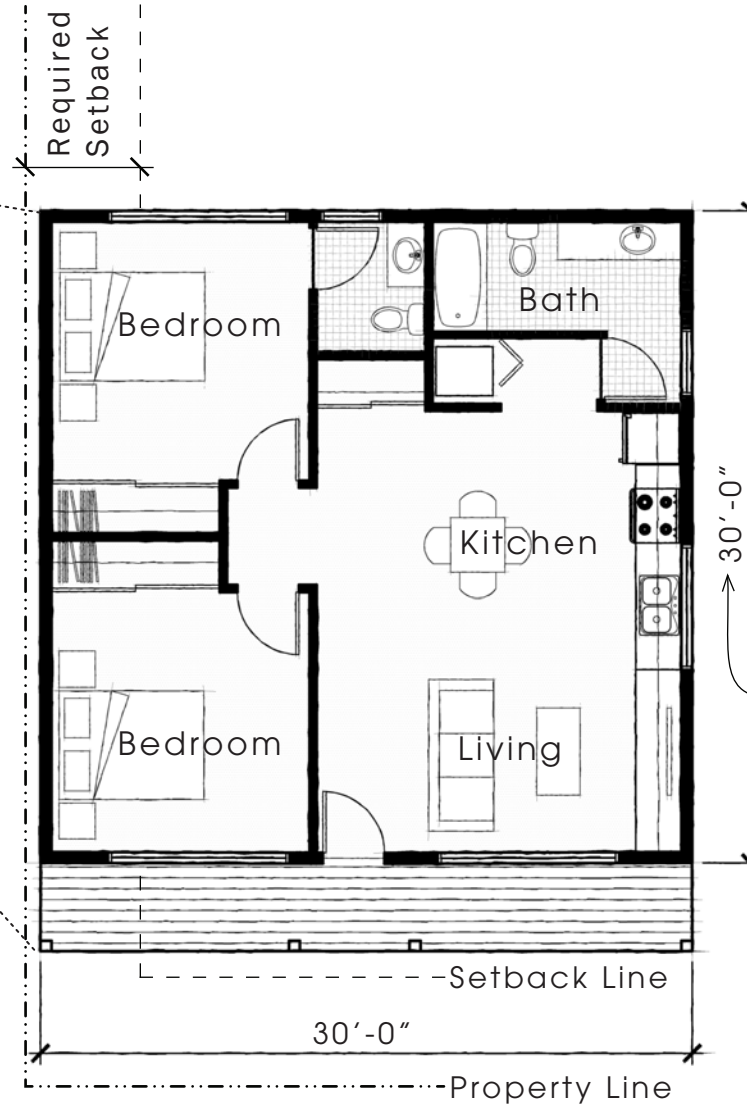
EXAMPLE

Lot Size
Unit Size

DETACHED

50' x 100'
900 Square Feet
2 Bedroom - 1.5 Bath

0 1 2 4 8 Feet



SOME IDEAS TO EXPLORE:

1. Build this as a free standing cottage.
2. One parking space is required.

NOTE:

1. 30'-0" Maximum encroachment for single story structure.
2. Windows are allowed within 2'-0" of Property Line, size and fire rating will vary.

SOME IDEAS TO EXPLORE:

1. Build 2 stories to increase square footage while maintaining open space.
2. 2 story units require standard setbacks and can have a maximum height of 30'-0"

Large

EXAMPLE

Lot Size

Unit Size

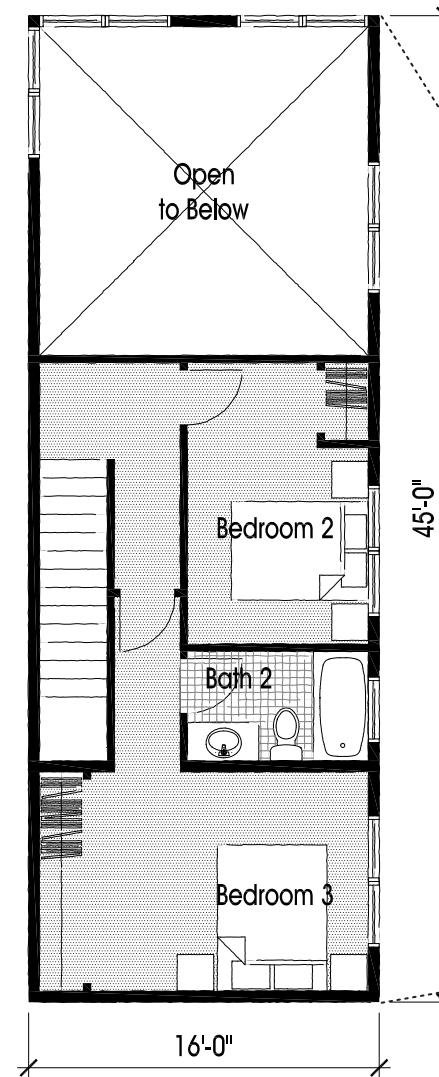
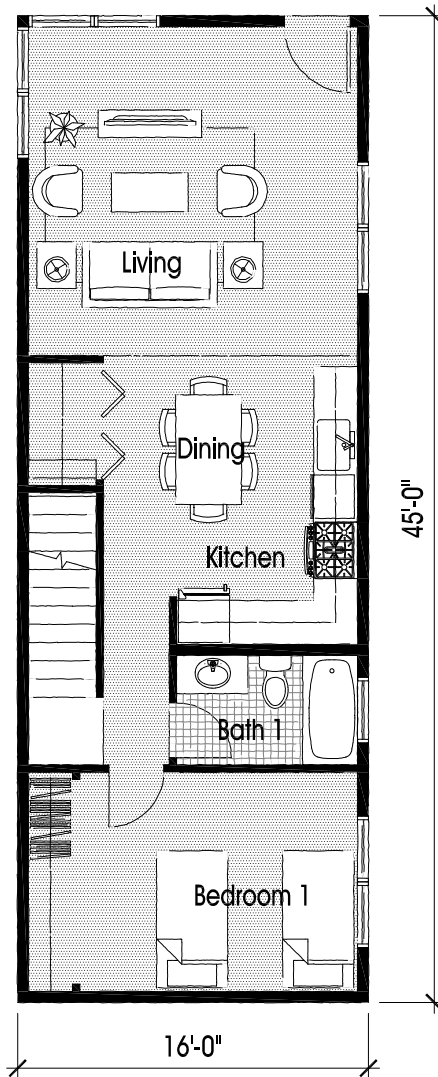
DETACHED

50' x 100'

1,200 Square Feet | 3 Bedroom - 2 Bath

0 1 2 4 8 Feet

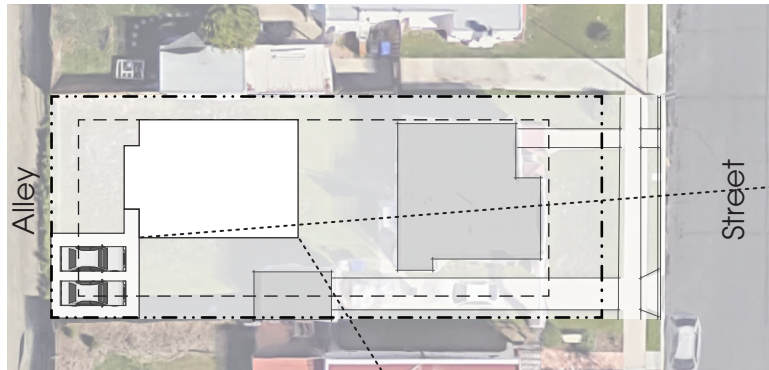
D



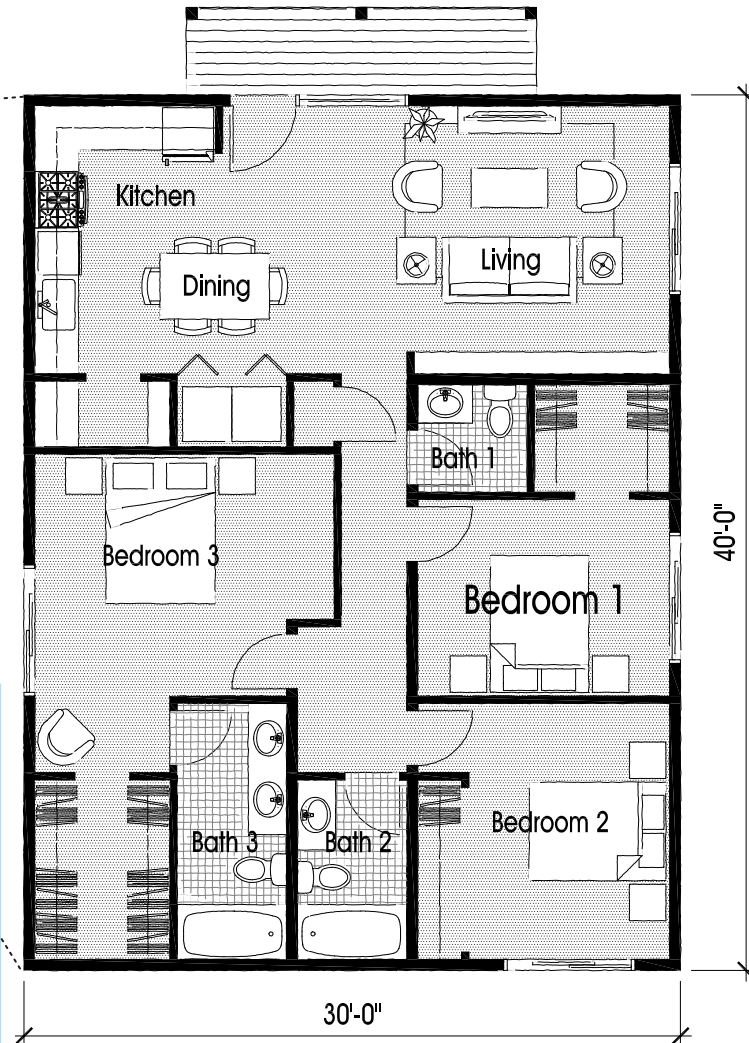
Site Context

DESIGN

D



Site Context



Large

EXAMPLE

Lot Size
Unit Size

DETACHED

50' x 100'
1,200 Square Feet
3 Bedroom - 2 Bath

0 1 2 4 8 Feet



SOME IDEAS TO EXPLORE:

1. Separation and privacy between the buildings.
2. Additional parking will need to be provided for dwellings greater than 500 Square Feet.

DESIGNING YOUR COMPANION UNIT

E

☒ ZONING

The zoning designation of your property can be found at the City of San Diego's website at:

<https://www.sandiego.gov/development-services/zoning>

☒ COMPANION UNIT ORDINANCE

docs.sandiego.gov/municode/MuniCodeChapter14/Ch14Art01Division03.pdf

☒ COMPANION UNIT/JUNIOR UNIT INFORMATION BULLETIN 400

Information Bulletin 400 can be found at the City of San Diego's website at:

<https://www.sandiego.gov/sites/default/files/dsdib400.pdf>

It is advisable to explore all the potential approaches before settling on the right one for you. Your property will likely have limitations and opportunities that will affect this choice. Also your personal preferences for design and working relationships will be an important part of this decision.

☐ JUNIOR UNIT

☐ DETACHED UNIT

☒ ATTACHED UNIT

☐ CONVERSION



Modular or Prefabricated



Garage



Attached

DESIGNING YOUR COMPANION UNIT

E

BUDGET

It is advised to secure a contractor and an estimate of cost before submitting the project for a building permit. There's little sense in going through the process of plan check (plan review) and permitting only to realize the project you've submitted is beyond your budget.

Refer to the cost estimating example to the right.

Refer to Bulletin 501 for additional fee

<https://www.sandiego.gov/sites/default/files/dsdib501.pdf>

TEAM

You will be working with your team for an extended period of time and trusting them with your finances. It's important to have confidence you've selected the best team members. Beyond family and friends and their references there are other sources to consider. There is a group in San Diego that has formed to further the design and craft of Companion Units. This group is the ADU Coalition – their contact information is included in the sources section of this document. Another source for design assistance is the San Diego Chapter of the American Institute of Architects and their contact information is also included in the sources section of this document.

COST ESTIMATING

HARD COSTS	Construction (labor)	Site Preparation	\$
		Foundation	\$
		Framing	\$
		Electrical	\$
		Plumbing	\$
		HVAC	\$
		Finish Carpentry	\$
		Landscaping	\$
	Materials	Concrete and Paving	\$
		Framing	\$
		Floor Surfaces	\$
		Roofing	\$
		Interior Finishes	\$
		Exterior Siding	\$
		Windows and Doors	\$
		Appliances	\$
Electrical		\$	
Plumbing		\$	
HVAC		\$	
Landscaping		\$	
SOFT COSTS	Financing	\$	
	Design and Engineering	\$	
	Permits	\$	
	Survey	\$	
	Utilities Hook-up*	\$	
	TOTAL ESTIMATED COSTS		\$



*Water meter rates will switch from single unit to a "multi-unit" rate.

DESIGNING YOUR COMPANION UNIT

CITY REQUIREMENTS

It is very convenient, time saving and cost controlling to employ one of the above approaches that involve pre-designed and preapproved Companion Unit plans. Each approach does require additional design and engineering work separate from the base plans. These represent some necessary approvals mandated by the City and State. These approvals are:

HISTORIC

An Historic evaluation to determine if there is any historic significance to the primary residence and how the new companion unit supports its historic features. This is mandated for any structure built 45 or more years ago.

FOUNDATION

Foundation design will be required to be provided in the case of a manufactured unit or modified in the case of an architect's pre-approved standard plan. This is necessary to accommodate the specific characteristics of each lot. This can be provided by your architect or in the case of a manufactured unit, you may need to engage a structural or civil engineer. This is a minor task and should not be an expensive one.

STORM WATER

A Storm Water Requirements Applicability Checklist (Form DS-560) must be scanned onto the plan set. This checklist determines your project's permanent and construction storm water best management practice requirements.

UTILITIES

Utilities need to be determined on a lot by lot basis. This will be done during the plan check and permitting period with the City.

TITLE 24

Title 24 of the California code of Regulations governs the design and construction of all building occupancies throughout the State of California. Title 24 requires an energy use analysis of the structure be included with the plans for building permit approval. This analysis can be quickly and inexpensively provided by any number of Title 24 consultants.

E



<http://www.dgs.ca.gov/dsa/Programs/progCodes/title24.aspx>



<https://rmg-engineers.com/blog/choose-right-foundation-types/>

HOW TO “GET IT DONE”

F

FINAL DESIGN

Once the basic design is set, attention is turned to the details which often are what makes the unit an attractive and livable place. Selecting the right exterior materials and color for example will greatly affect how well the unit fits with the main house and surrounding neighborhood. The interior finishes, fixtures and appliances will set the “style” of the living environment, but must also be practical, affordable and maintenance free. This is best accomplished as a joint effort between you, your designer and contractor.

CONSTRUCTION DOCUMENTS

Everyone is hopeful that their project will work its way through the building permit process quickly and with a minimum of changes and challenges. A well-established principle to possibly achieving this result is to make sure the plan and application submittal is complete and comprehensive. Spending time ensuring your submittal is complete will save time during the plan check and permit process. Even though the City has adopted a streamlined process to check your plans, completeness is still essential.

To fully understand the Project Submittal Requirements, you and/or your designer should review the Land Development Manual Volume 1 Chapter 1 Section 2A.

https://www.sandiego.gov/sites/default/files/dsdpsm_sec_02a.pdf

PERMITTING

As a result of the State and local legislation and ordinances the seek to streamline the process, there is no need for a separate planning review and permit. However, there is still a need to secure a building permit for the City of San Diego.

Building permit submittal requirements are outlined in detail in the City of San Diego Development Services Department Information Bulletin 400 (September 2018) “Companion Unit/Junior Unit” and the City of San Diego Land Development Manual, Project Submittal Requirements Section 2A. Contact information is listed in Section H - Resources, References and Contacts

While, as stated a homeowner may have the skills to document and permit their own Companion or Junior Unit, most will require the assistance of a designer or architect. Securing a building permit for a Companion or Junior Unit is required by City Ordinance. The process has been simplified to further encourage the construction of these units, but still requires documentation of the site plan, floor plan, structure, utilities and site drainage for example. There may also be a requirement to address historical issues if the existing structures are over 45 years old.

Building Permit Submittal Checklist

Plans and Calculations

- ☐ Complete Plans
- ☐ Structural Calculations
- ☐ Geotechnical Report
- ☐ Title 24 Calculations

Forms

- ☐ General Application
- ☐ Water Meter Data Card
- ☐ Storm Water Requirements Applicability Checklist

Payment

- ☐ Plan Check Fees

For a complete list of requirements see City of San Diego - Information Bulletin 152

<https://www.sandiego.gov/sites/default/files/dsdib152.pdf>

HOW TO “GET IT DONE”

F

PERMITTING

Typical Review Process

Upon submitting the construction documents, the documents will then be reviewed by city staff for completeness and code conformance. Below is a typical list of reviews:

1. Planning and or Zoning

Location, setbacks, height, parking

2. Structural

Fire, Life Safety, Structural Design and Calculations

3. IAS-Combined

Mechanical, electrical, plumbing and water meter-fixtured units, Title24

4. Engineering

Land disturbance and erosion control

5. Historical

Is your building more than 45 years old?
If yes, project will be reviewed for historical significance.

6. Addressing

New address for Companion Unit

CONTRACTOR

Some homeowners may be able to build their unit themselves because they have the skills, experience and team to accomplish this successfully. Most homeowners will require the services of a general contractor because they do not have these necessary qualities. It's important to know your contractor and their work. It's recommended that a homeowner interview and visit the projects they have completed.



CONSTRUCTION + OCCUPANCY

Construction can be both exciting and daunting. It's exciting to see a new structure emerge out of the creative process. It can be daunting because of technical issues or cost overruns. It's good to remain optimistic but realistic. It's even more important to have a good contractor and a realistic budget.

During construction homeowners should plan to pay close attention to the quality and appropriateness of the work to make sure it is meeting with expectations.



FINANCING YOUR COMPANION UNIT



AFFORDABILITY

Can I afford to build a companion unit and how can it be financed? The best way to answer these questions is through you, your contractor and a financial source such as a bank. Remembering that you will have a revenue stream if you rent the unit is important. By now, you have a good idea about the cost of building a companion unit, so with your financial source you'll be able to project monthly cost and income associated with the unit. This will help you work with the following components of a financial plan which are:

- Current equity in your property will be an important part of this equation. This value may provide the platform from which you'll be able to finance the new construction and in fact add to the value of your property.
- Construction cost and how much of that cost you'll need to finance. Of course, this is the amount you'll have to borrow to build the unit. Don't forget building department fees and other "soft" costs.
- Rent, if applicable will be important as a source to cover loan, taxes and maintenance costs. If you have a tenant committed that will solidify your projection of costs and revenue.
- Timing is important as the financial markets change, but also you may need to carry the costs during construction before you have revenue from a tenant.

FUNDING

Sources of funds are many and at this writing continuing to develop. You may check in with the San Diego Housing Federation for referrals to financing sources that have an interest in supporting the companion unit programs.

FINANCING YOUR COMPANION UNIT



Property Tax Implications from Companion Units

Here is a quick breakdown of how a companion unit will impact your property taxes.

Is a companion unit taxable?

Yes. Companion units are considered an “improvement,” whether it is a new construction or a remodel that it is considered “like new” construction.

How do you appraise the value of my companion unit?

When valuing improvements to a property or partial completion of new or substantially equivalent to new construction, the cost approach is often utilized. The cost approach considers all costs typically incurred during the course of construction. These “full economic costs” include the market value of labor, materials, permit fees, contractor’s overhead, and profit. The costs used in this approach are published and updated each year by California’s State Board of Equalization. The price actually paid by a property owner for the completed project may be different than State-published costs.

How is my companion unit added to my property tax bill?

The Assessor’s office calculates what is called a blended assessment. A blended assessment means the base value of the existing house and land will stay the same. Then the additional value of your companion unit is added at the current market rate to the existing home’s assessed value. Once everything is added together, the tax rate of 1% will be added to that amount.

Example: A property is purchased in 1990 for \$100,000, which becomes the base year value. That base year value would then increase by no more than 2% annually. After ten years, the assessed value increases to \$121,896. If, in the tenth year, you build a companion unit appraised at \$50,000, the Assessor’s office would then add the base year value to the improvement value or “blend” them to equal your property’s new blended assessed value.

$$\$121,869 + \$50,000 = \$171,869$$

The amount of \$171,869 would be the new assessed value of the property.

Does Proposition 13 apply to companion units?

Yes. The assessed value is set when the companion unit improvement is added to the property. It will be taxed at 1% and limited up to a 2% annual increase based on the CPI.

FINANCING YOUR COMPANION UNIT

Property Tax Implications from Companion Units

Will the increased property tax appear on my regular property tax bill?

Any new construction that adds value to the property will generate a one-time supplemental property tax bill. That supplemental assessment represents the market value of the new improvements at the completion of construction. The supplemental accounts for the difference between the value existing on the assessment roll as of the most recent January 1 lien date and the new value after completion. Subsequently, the blended assessment will be reflected on your regular bill.

How much property tax will I pay on my companion unit?

Under State law (Proposition 13), the property tax rate in California is 1% for all properties, with an annual tax increase limited to no more than 2% of the assessed value.

Example: If the companion unit is appraised under California property tax rules at \$50,000 of the assessed value, then the annual property tax increase would be 1% of \$50,000 or \$500 and increased up to 2% annually from the \$50,000 base year value.

Can I appeal the appraised value set for the companion unit?

Yes. Property owners can appeal the value of the property by filing an Assessment Appeal Application. Assessments on companion units must be appealed within 60 days after the date the notice of change in assessment is mailed.

The San Diego County Assessor's office offers informal reviews in order to attempt to resolve the matter before a formal hearing is requested. An informal review can be requested Online at: <https://arcc.sdcounty.ca.gov/pages/assessment-review.aspx>

A formal appeal can be made by obtaining an Assessment Appeal Application from the Clerk of the Board of the San Diego County Supervisors. More information on property tax assessment appeals can be found at: <https://www.sandiegocounty.gov/cob/aab/index.html>

Will I lose my Proposition 13 protection and have my property and land reassessed?

No. Adding an improvement does not trigger reassessment. If you bought your house in 1990 for \$100,000 (known as base year value), then the taxes on your home and the land, including the land under the companion unit, would remain the same and be based on that base year value.



Property Tax Questions?

Contact the San Diego County Assessor's Office:



Phone:
(619) 236-3771

Email:
arcc.fgg@sdcounty.ca.gov

Website:
www.SDARCC.com

RESOURCES, REFERENCES AND CONTACTS

H

LOCAL RESOURCES

- American Institute of Architects San Diego – www.aiasandiego.org – 619-232-0109
- Maxable - Maxable Space helps connect homeowners to the education and service providers needed to build an accessory dwelling unit. Download their free tools here: www.MaxableSpace.com
- ADU Coalition - The Coalition provides home-owners with simple tools to determine eligibility and regulations around the region. Home-owners are guided to the subject matter experts for their specific ADU questions and needs. The ADU Coalition maintains a library of professionally developed designs that can be expedited through the permitting process for many jurisdictions. Visit them here: www.aducoalition.org
- Case Studies – <https://accessorydwellings.org/category/projects/case-study/>

CITY DOCUMENTS

- City of San Diego Zoning Map <https://www.sandiego.gov/development-services/zoning>
- City of San Diego Information Bulletin 400 – Companion Unit/Junior Unit
<https://www.sandiego.gov/sites/default/files/dsdib400.pdf>
- City of San Diego Development Services <https://www.sandiego.gov/development-services>
- City of San Diego Land Development Manual, Project Submittal Requirements
https://www.sandiego.gov/sites/default/files/dsdpsm_sec_02a.pdf#Page=5
- San Diego Municipal Code Chapter 14 Separately Regulated Use Regulations - Residential Use Category
<http://docs.sandiego.gov/municode/MuniCodeChapter14/Ch14Art01Division03.pdf>
- Residential Solar Photovoltaic Systems
<https://www.sandiego.gov/development-services/permits-inspections/residential-solar>
- City of San Diego Photovoltaic Plan Template
<https://www.sandiego.gov/sites/default/files/legacy/development-services/pdf/pvplantemplate.pdf>



Maxable