

JUMPSTART ADU WORKSHEETS



These worksheets and other ADU project guidance and resources are available online at eldoradoadu.org.

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IDENTIFYING GOALS & CONCERNS

	Goals	Short-term	Long-term
Rental income	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Housing for a family member	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Helping out the community (e.g., housing a teacher)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Housing for someone with special needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Planning for retirement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increased resale value	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Downsizing/moving into the ADU	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Housing domestic help (e.g., an au pair)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Help with chores or to watch over things when you are away	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Housing an in-home caregiver	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Concerns	Short-term	Long-term
Cost	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hiring/managing contractors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Privacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Site constraints	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Challenges of renting and managing the ADU	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conflict with neighbors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Getting approval/scrutiny from government	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



RECORDING YOUR ADU GOALS

To stay motivated through challenges in the process, some people find it helpful to write down what building their ADU will allow them to do. Use this space to express your goals – consider cutting it out and putting it somewhere you’ll see it regularly. Examples: “Take the kids to Disneyland every year.” “Make sure my mom has a safe place to live.”

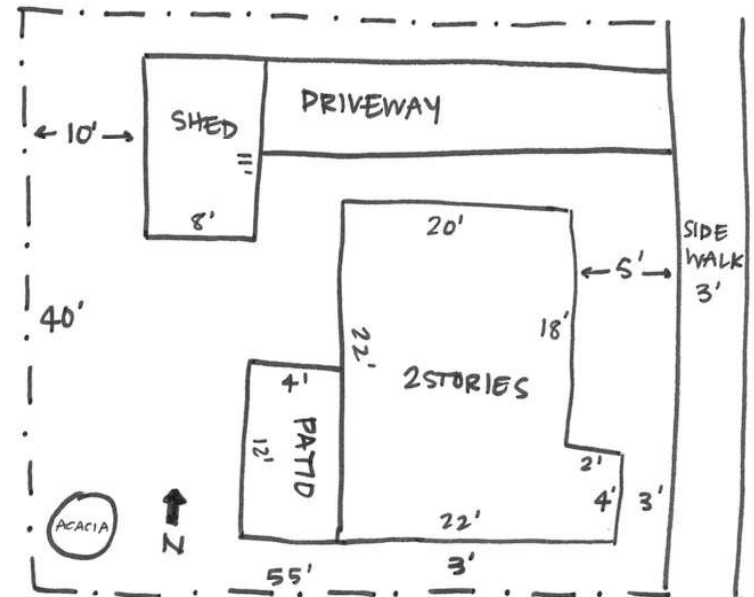


MAKING A ROUGH SKETCH OF YOUR PROPERTY

Drawing a site plan is an essential step, both for your own planning and to get permit approvals. A site plan shows your property line and key information such as buildings, setbacks, lot line, etc. Most homeowners hire a professional to produce the final version, but it is often helpful to have a rough sketch to start. At this stage, you are going to draw major elements like building footprints, driveways, trees, etc.

- 1. Consult the Can I Build tool on eldoradoadu.org.** Use this tool to learn about your property, and as a basic guide for placing an Accessory Dwelling Unit on your property. Keep in mind that this is just a guide.
- 2. Start by sketching out your property lines, measuring and marking them accordingly.** (You can use fences to estimate property lines, but at some point you may need to get a professional surveyor on-site.) Add any existing structures. Focus on the basic shape. You don't need to worry about inside floor plans, you just need to capture the footprint and whether it is one or two stories. Note special features like porches, trellises, and exterior stairways.
- 3. Next, add in the driveway and any easements.** Be sure to measure the length and width of the driveway. Pay attention to other significant features like pools, trees, propane tanks, septic systems, steep slopes, etc. When you are done, you will have something that looks like the sketch to the right.
- 4. Now, try doing a drawing to scale.** Depending on your lot size, a good scale might be one inch equals ten feet. If possible, try to have your north arrow direction pointing upwards on the page. Besides drawing the lines, be sure to make notes about the exact length as well. Be sure to use pencil. Now would be a good time to note defensible space requirements.
- 5. Make a copy.** You'll want to copy your site plan or take a photo with your phone, because you will probably end up drawing on it several times as you explore ideas and begin your work with professionals.

Example:



Eventually, the site plan needs to be drawn to scale, but to start you should use scratch paper.

If the site plan is feeling too stressful, you can skip it for now or go outside and do a really rough sketch on a napkin. It's better to meet with local staff earlier than to get everything right.

Note: Each 4x4 square on the following page equals 1."



MAKING A ROUGH SKETCH OF YOUR PROPERTY

Keep in mind that this is a rough sketch and will not be accepted as a valid site plan. Your completed site plan will have several elements, including the plan, any easements, Fire Safe/Defensible Space regulation compliance, as well as topography and proposed grading. Consult the Site Plan / Plot Plan Requirements for submission at tinyurl.com/EDCSitePlans.



PROPERTY DETAILS

One of the first steps will be to gather important information about your property. See eldoradoadu.org/learn-the-rules for more details including links to tools and resources for finding the information below.

Assessor's Parcel Number (APN):

Lot size in square feet:

Size of the primary house and any other buildings/structures on the lot

Special zones and conditions: Take notes here about any of the following zones/special circumstances: Historic resource/district, flood zone, seismic zone, ecological preserves, wind speed, soil bearing, snow load, fire safety zone, Homeowners Association or Community Services District. Confirm all details with local staff.

Special districts: Take notes here about any of the following special districts: Water district, fire district, school districts. Confirm all details with local staff.

DEVELOPMENT STANDARDS FOR YOUR PROPERTY

These rules dictate where and how much you can build on your property based on your zone. It can feel empowering to know this, but you don't need to know all the details – your design team and local

Zoning, Special Zones and Conditions:

Setbacks: Front, sides, and rear

Maximum height:

Other relevant development standards (lot coverage, floor area ratio, etc. – these will differ in each set of local zoning rules):



STAFF MEETINGS

One of the best things you can do is to talk to local staff early in the process. See eldoradoadu.org/contact for information on setting appointments or getting in touch with local staff. Many of the questions below are also addressed on the Jumpstart ADU website (eldoradoadu.org), but you can take this opportunity to clarify anything unique to your property.

1. Do you have official record of my existing floor area? What areas should I count when determining existing size? (County Recorder/ Planning Staff)
2. What are the setbacks, height, and site coverage or floor area limits for my property? What easements exist on my property? Are there other development standards for my property that I should know about? (Planning Staff)
3. Does my property fall in any special zones that may impact what I can build? (historic, fire hazard, flood, seismic, etc.) (Planning Staff)
4. Will I need to add parking? Does my home meet parking requirements? (Planning Staff)
5. What do I need from my Homeowners Association (HOA) or Community Services District? (Building Staff)
6. Are there fire safety or sprinkler regulations I should know? (Building Staff)



STAFF MEETINGS

7. What potential problems do you see with my property? (Planning Staff)
8. When should I start talking to utility companies about requirements?
9. How long does permitting take? When should I check in if I haven't heard anything? How do I do that? (Building Staff)
10. Can you explain all the fees I'll be expected to pay as part of permitting? (Building Staff)
11. Are there common pitfalls or mistakes to watch out for in the design, application, or construction process? (Planning Staff & Building Staff)
12. How does the deed restriction work? When do I do that? (Planning Staff)
13. Are there restrictions on how I can use my ADU? (Planning Staff)
14. Can you summarize any other rules that are important? (Planning Staff & Building Staff)



DOCUMENT PREPARATION

As you complete the steps to planning, designing, building, and occupying your ADU, there will be documentation requirements from El Dorado County in order to proceed. This checklist is a broad list of what is generally required. Please keep in mind that these regulations may change, confirm all needed documentation with the Planning and Building Department. This guide is for pre-reviewed plans in unincorporated El Dorado County only, new or un-reviewed plans will require extra steps for their approval.

- ✓ **Pre-Reviewed ADU Checklist:** available at tinyurl.com/PreReviewedADU
This document is required as part of your ADU submittal.
- ✓ **Completed ADU Application:** available at tinyurl.com/EDCADUApp
Use the information gathered thus far to complete the ADU Application.
- ✓ **MWELO (Model Water Efficient Landscape Ordinance) Checklist:** available at tinyurl.com/EDCMWELO
MWELO promotes efficient water use in new and retrofitted landscapes. The MWELO applies to: 1) New projects equal to or greater than 500 square feet and 2) Rehabilitated landscape projects greater than 2,500 square feet. For more information, visit eldoradocounty.ca.gov, search keyword: MWELO.
- ✓ **Oak Resources Compliance Certificate:** available at tinyurl.com/EDCOaks
The Oak Resources Compliance Certificate must be completed for all projects.
- ✓ **Hold Harmless Agreement:** available at tinyurl.com/EDCHoldHarmless
The Hold Harmless Agreement is required for all projects which use the Pre-Reviewed Plans
- ✓ **Site/Plot Plan:** requirements for a valid site/plot plan are available at tinyurl.com/EDCSitePlans
You must include two complete sets of site/plot plans which meet all County criteria in order for the application to be deemed complete. The following information must, at a minimum, be clearly included: 1) The Site/Plot Plan drawn at a conventional scale; 2) Show the location and dimension of all recorded easements; 3) Show how the CA "Fire Safe/Defensible Space" Regulations will be met; 4) Show the existing site topography; 5) Show the proposed grading; and 6) Show how CALGreen site development requirements will be met. In addition, if your property falls within a Flood Zone, additional documentation will be required.
- ✓ **Photovoltaic (PV) installation requirements:** more information is available at tinyurl.com/EDCPVChecklist
PV System design requirements are delineated in the Pre-Reviewed Plans. You must provide 2 copies of the PV Installation Plans
- ✓ **Residential Fire Sprinkler System Plans:** more information available at tinyurl.com/ADUSprinklers
If applicable, see page 23 of the Handbook above, submit 2 complete copies of the fire sprinkler plans.



EL DORADO COUNTY BUILDING ACCESSORY DWELLING UNIT / JUNIOR ACCESSORY DWELLING UNIT APPLICATION

1. IDENTIFY YOUR BUILDING PROJECT Application Number _____

ASSESSOR'S PARCEL NUMBER _____
 PARCEL LOCATION OR SITE ADDRESS _____
 Street or Road Number and Name _____

PROPERTY OWNER NAME _____ Phone _____
 Mailing Address _____
 P.O. Box or Street _____ City _____ State _____ ZIP _____
 E-Mail Address _____ Cell Phone _____

APPLICANT NAME _____ Phone _____
 I am the: Owner/Builder Contractor Architect/Designer Project Engineer Agent for: Owner Contractor
 Mailing Address _____
 P.O. Box or Street _____ City _____ State _____ ZIP _____
 E-Mail Address _____ Cell Phone _____

SELECT TYPE(S) OF PROPOSED ACCESSORY DWELLING UNIT(S) (ADU):
 CATEGORY 1 ADU: CONSTRUCTION OF ONE OR MORE ACCESSORY DWELLING UNITS.
 CATEGORY 2 ADU: CONVERSION OF SPACE WITHIN AN EXISTING ONE-FAMILY RESIDENTIAL FACILITY TO A JUNIOR ACCESSORY DWELLING UNIT.





DOCUMENT PREPARATION

If your property is located within a CSD (Community Services District), requires fire sprinklers or something simliar, the resources below will help you get started on their approvals.

1. Is your property located within a CSD (Community Services District)? Cameron Park CSD: CameronPark.org or El Dorado Hills CSD: eldoradohillscsd.org.
2. Does my ADU require fire sprinklers? More information available at: tinyurl.com/ADUSprinklers
3. Will your ADU be on a well &/or require a septic system? More information available at: tinyurl.com/EDCWells and at tinyurl.com/EDCSeptic
4. Are you planning to connect to EID water & sewer? More information available at: tinyurl.com/EIDWater
5. Have you contacted PG&E to connect service? For more information, see: tinyurl.com/PGEInstalls
6. Will your ADU require propane? Find more information at: tinyurl.com/EDCPropane
7. Are you planning to landscape your ADU? More information available at: tinyurl.com/EDCMWELO



BUDGETING

These questions will help you think through and get started with financial planning for your ADU.

See eldoradoadu.org/budget for more information.

1. What are the estimated construction costs? What are the estimated permitting costs?
2. How are you planning to finance your ADU?
3. How much cash, savings or other liquid assets can you put into the project?
4. Do you have any friends and/or family that you may be able to ask for a loan?
5. How much equity (the portion of your home's value you own outright) do you have in my home? $\text{market value of home} - \text{remaining mortgage balance} = \text{equity}$
6. Do you want to consider applying for a loan from a lender?

 **BUDGETING**

7. Will your income support a loan?
8. Do you expect to qualify for a loan?
9. Do you prefer a bank, credit union, or mortgage broker?
10. What banks, credit unions and/or mortgage brokers will you reach out to? Make sure to include your current lender.
11. Which loan(s) best suit your situation?
12. What do you expect to rent your ADU for? This will be a source of loan repayment.
13. If a family member or friend is going to live there, can they contribute by paying rent?
14. Is your priority to maximize income or to help meet the housing needs of the community?
15. What other financial considerations do you have and/or what ideas do you want to explore?



INITIAL DESIGN

Here are some notes and questions to get you started on the design process. Remember, all of these might change when you start discussing costs. Review the goals you identified in previous worksheets to ensure they are still appropriate. See eldoradoadu.org/design for more details.

1. What type of ADU do you want? e.g., detached, conversion, etc. See eldoradoadu.org/adu-101.
2. If you belong to a Homeowners Association, do they have design guidelines you'll need to follow?
3. Do you want a modern or traditional feel?
4. What are some houses that you like and why?
5. Are there floor plans you like/don't like? What features stand out? See eldoradoadu.org/floorplans for examples.
6. Are there features in your current or past homes that you loved or could be improved that can help inspire your ADU?
7. How many bedrooms do you want? How many bathrooms do you want, and do you want them larger or smaller?
8. Do you want more communal space (living room) or larger bedrooms?



INITIAL DESIGN

9. What kind of kitchen do you want (chef's kitchen or something less expensive)?
10. Will there be a washer and dryer in the unit?
11. Do you want features that will help people stay in the home as they age or that account for special needs? e.g., level entry, accessible bathrooms, grab bars, no stairs, etc.
12. Do you want additional green or sustainable features?
13. Are there landscaping plans you would like to incorporate?
14. Do you have preferences about the flow of the house? Such as: entrance should be here, a door to the garden, etc.
15. How should you situate your ADU on your property? Think about natural light, access to utilities, and privacy (for both the primary residence and the neighbors).
16. Do you want to create outdoor space adjacent to the ADU? Are there trees or features to protect?



DESIGN IDEAS

Write down your initial thoughts here. When it's time to make decisions about these elements, pull this out.

Flooring

Lighting

Siding



DESIGNER CONSIDERATIONS

Before you start looking for a designer, consider what you're want. See the Guidebook's Design section for more information on choosing a designer.

1. Would you rather work with a licensed architect, who has more training, or a designer, who will likely be less expensive?
2. Do you want to use modular/prefab construction (unit is partially built off-site)?
3. Do you want to use a design/build firm to handle drawings and construction?
4. How client-centered do you want your designer to be? Homeowners may be actively involved or hands-off; designers may welcome interaction or hate it.
5. Do you prefer to work with a larger firm or a smaller firm? Both have pros and cons. In the end it comes down to your personal preference.
6. Do you want your designer to just prepare drawings, or do you want them also to help with permitting, construction drawings, and/or the construction phase?



IDENTIFYING WHAT YOU WANT IN A LEASE

Use this space for decisions about your lease terms. See the Guidebook bonus section on Move-In for more info.

1. What is the rent?
2. When is rent due and how will it be paid?
3. What is the security deposit?*
4. Is your lease fixed-term or month-to-month?
5. At the end of the rental period, does the lease terminate or turn into a month-to-month rental?
6. Does the unit include parking?
7. Do you allow pets? If so, what type? How many? Size restrictions? Will you ask for a pet deposit?
8. Does the rent include utilities such as water, electrical, trash, and/or gas?
9. Do you allow tobacco or cannabis use?
10. Do tenants have access to any shared spaces (yard, storage, etc.) and, if so, what are the terms?
11. Are you limiting the number of tenants?***
12. Is there anything else will you include in your lease?

* As of July 2024, California law says you may charge up to two months' rent (First Month's Rent plus Security Deposit). Some exceptions apply for small landlords.

** Landlords can generally limit the number of tenants and state law has found the two-plus-one formula (two people per bedroom plus one person) as reasonable but subject to rebuttal based on local factors like size of the bedrooms, configuration of the residence, age of the children, and local laws.