

HOUSING ELEMENT OF
THE LODI GENERAL
PLAN

PUBLIC
HEARINGS

Notice thereof having been published in accordance with law and affidavit of publication being on file in the office of the City Clerk, Mayor Olson called for the Public Hearings to consider:

- a) Certifying the filing of a Negative Declaration by the Community Development director as adequate environmental documentation for the Housing Element of the Lodi General Plan.
- b) The Planning Commission's recommendation that the Housing Element of the Lodi General Plan be approved as to content so that it may be submitted to the State Department of Housing and Community Development for Certification.

Following introduction of the matter by Community Development Director Schroeder, Gaye Papais Assistant Planner and Project Coordinator addressed the Council giving an overview of the documents, presenting visual aides supporting her presentation and responding to questions as were posed by members of the Council.

There being no persons in the audience wishing to address the Council on the matter, the public portion of the hearing was closed by Mayor Olson.

Following additional discussion, on motion of Mayor Pro Tempore Snider, Pinkerton second, Council certified the filing of a Negative Declaration by the Community Development Director as adequate environmental documentation for the Housing Element of the Lodi General Plan.

Further, on motion of Mayor Pro Tempore Snider, Pinkerton second, Council approved as to content the proposed Housing Element of the Lodi General Plan and directed that the document be submitted to the State Department of Housing and Community Development for certification.

There being no further business to come before the Council, Mayor Olson adjourned the meeting at approximately 8:40 p.m.

Attest:

Alice M. Reimche
City Clerk

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479
CITY COUNCIL MEETING

JULY 26, 1983

HOUSING ELEMENT OF
THE LODI GENERAL
PLAN

PUBLIC
HEARINGS

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Further, on motion of Mayor Pro Tempore Snider, Pinkerton second, Council approved as to content the proposed Housing Element of the Lodi General Plan and directed that the document be submitted to the State Department of Housing and Community Development for certification.

NOTICE OF NEGATIVE DECLARATION
FOR THE HOUSING ELEMENT OF THE
LODI GENERAL PLAN

Notice is hereby given that the Community Development Director has filed a Negative Declaration as adequate environmental documentation for the housing element of the Lodi General Plan.

NOTICE IS HEREBY FURTHER GIVEN that on Tuesday, July 26, 1983 at the hour of 8:00 p.m. or as soon thereafter as the matter may be heard, the Lodi City Council will conduct a Public Hearing on the matter in the Council Chambers, City Hall, 221 West Pine Street, Lodi, California.

Information regarding this item may be obtained in the office of the Community Development Director at 221 West Pine Street, Lodi, California. All interested persons are invited to present their views and comments on the Negative Declaration. Written statements may be filed with the City Clerk at any time prior to July 26, 1983.

By Order of the Lodi City Council

Alice M. Reimche
Alice M. Reimche
City Clerk

Dated: July 6, 1983

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NOTICE OF PUBLIC HEARING BY THE CITY COUNCIL OF THE CITY OF LODI TO CONSIDER THE PLANNING COMMISSIONS RECOMMENDATION THAT THE HOUSING ELEMENT OF THE LODI GENERAL PLAN BE APPROVED AS TO CONTENT SO THAT IT MAY BE SUBMITTED TO THE STATE DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT FOR CERTIFICATION

NOTICE IS HEREBY GIVEN that on Tuesday, July 26, 1983, at the hour of 8:00 p.m. or as soon thereafter as the matter may be heard, the Lodi City Council will conduct a public hearing in the Council Chambers, City Hall, 221 West Pine Street, Lodi, California, to consider the Planning Commissions recommendation that the Housing Element of the Lodi General Plan be approved as to content so that it may be submitted to the State Department of Housing and Community Development for certification.

Information regarding this item may be obtained in the office of the Community Development Director at 221 West Pine Street, Lodi, California. All interested persons are invited to present their views either for or against the above proposal. Written statements may be filed with the City Clerk at any time prior to the hearing scheduled herein and oral statements may be made at said hearing.

Dated: July 6, 1983

By Order of the City Council

Alice M. Reimche
ALICE M. REIMCHE
City Clerk

Please review for Wednesday's Council meeting

This is the legal basis for the Housing Element

Article 10.6

HOUSING ELEMENTS

Sec.

- 65580. Legislative finding and declaration.
- 65581. Intent of legislature.
- 65582. Definitions.
- 65583. Contents of housing element.
- 65584. Locality's share of regional housing needs; determination and distribution; revision.
- 65585. Guidelines in preparation and amendment of housing element; submission and review; advisory findings; final adoption.
- 65586. Time within which housing elements must conform to guidelines and this article.
- 65587. Conformity; extension of time; actions to review conformity; time for compliance with finding of court; additional time.
- 65587.1. Revenue bond programs; local approval of housing related projects; compliance with relevant laws.
- 65588. Review and revision.
- 65589. Construction of article.
- 65589.5. Proposal of local agency to disapprove project or approve project or condition of lower density; written findings; existence of conditions.

Article 10.6 was added by Stats.1980, c. 1143, p. 3697, § 3.

Law Review Commentaries

California legislature prohibits exclusionary zoning, mandates fair share: Inclusionary housing programs a likely response. Carolyn Burton (1981) 9 San Fernando Valley L.Rev. 19.

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Library References

Health and Environment ⇐32.

C.J.S. Health and Environment §§ 28 to 36, 52.

§ 65580. Legislative finding and declaration

The Legislature finds and declares as follows:

(a) The availability of housing is of vital statewide importance, and the early attainment of decent housing and a suitable living environment for every California family is a priority of the highest order.

(b) The early attainment of this goal requires the cooperative participation of government and the private sector in an effort to ex-

§ 65580

PLANNING AND ZONING

Title 7

Div. 1

pand housing opportunities and accommodate the housing needs of Californians of all economic levels.

(c) The provision of housing affordable to low- and moderate-income households requires the cooperation of all levels of government.

(d) Local and state governments have a responsibility to use the powers vested in them to facilitate the improvement and development of housing to make adequate provision for the housing needs of all economic segments of the community.

(e) The Legislature recognizes that in carrying out this responsibility, each local government also has the responsibility to consider economic, environmental, and fiscal factors and community goals set forth in the general plan and to cooperate with other local governments and the state in addressing regional housing needs.

(Added by Stats.1980, c. 1143, p. 3697, § 3.)

§ 65581. Intent of legislature

It is the intent of the Legislature in enacting this article:

(a) To assure that counties and cities recognize their responsibilities in contributing to the attainment of the state housing goal.

(b) To assure that counties and cities will prepare and implement housing elements which, along with federal and state programs, will move toward attainment of the state housing goal.

(c) To recognize that each locality is best capable of determining what efforts are required by it to contribute to the attainment of the state housing goal, provided such a determination is compatible with the state housing goal and regional housing needs.

(d) To ensure that each local government cooperates with other local governments in order to address regional housing needs.

(Added by Stats.1980, c. 1143, p. 3697, § 3.)

§ 65582. Definitions

As used in this article:

(a) "Community," "locality," "local government," or "jurisdiction", means a city, city and county, or county.

(b) "Department" means the Department of Housing and Community Development.

(c) "Housing element" or "element" means the housing element of the community's general plan, as required pursuant to this article and subdivision (c) of Section 65302.

(Added by Stats.1980, c. 1143, p. 3697, § 3.)

Words

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Library References

Words and Phrases (Perm.Ed.)

§ 65583. Contents of housing element

The housing element shall consist of an identification and analysis of existing and projected housing needs and a statement of goals, policies, quantified objectives, and scheduled programs for the preservation, improvement, and development of housing. The housing element shall identify adequate sites for housing, including rental housing, factory-built housing, and mobilehomes, and shall make adequate provision for the existing and projected needs of all economic segments of the community. The element shall contain all of the following:

(a) An assessment of housing needs and an inventory of resources and constraints relevant to the meeting of these needs. The assessment and inventory shall include the following:

(1) Analysis of population and employment trends and documentation of projections and a quantification of the locality's existing and projected housing needs for all income levels. Such existing and projected needs shall include the locality's share of the regional housing need in accordance with Section 65584.

(2) Analysis and documentation of household characteristics, including level of payment compared to ability to pay, housing characteristics, including overcrowding, and housing stock condition.

(3) An inventory of land suitable for residential development, including vacant sites and sites having potential for redevelopment, and an analysis of the relationship of zoning and public facilities and services to these sites.

(4) Analysis of potential and actual governmental constraints upon the maintenance, improvement, or development of housing for all income levels, including land use controls, building codes and their enforcement, site improvements, fees and other exactions required of developers, and local processing and permit procedures.

(5) Analysis of potential and actual nongovernmental constraints upon the maintenance, improvement, or development of housing for all income levels, including the availability of financing, the price of land, and the cost of construction.

(6) Analysis of any special housing needs, such as those of the handicapped, elderly, large families, farmworkers, and families with female heads of households.

(7) Analysis of opportunities for energy conservation with respect to residential development.

(b) A statement of the community's goals, quantified objectives, and policies relative to the maintenance, improvement, and development of housing.

It is recognized that the total housing needs identified pursuant to subdivision (a) may exceed available resources and the community's ability to satisfy this need within the content of the general plan requirements outlined in Article 5 (commencing with Section 65300). Under these circumstances, the quantified objectives need not be identical to the identified existing housing needs, but should establish the maximum number of housing units that can be constructed, rehabilitated, and conserved over a five-year time frame.

(c) A program which sets forth a five-year schedule of actions the local government is undertaking or intends to undertake to implement the policies and achieve the goals and objectives of the housing element through the administration of land use and development controls, provision of regulatory concessions and incentives, and the utilization of appropriate federal and state financing and subsidy programs when available. In order to make adequate provision for the housing needs of all economic segments of the community, the program shall do all of the following:

(1) Identify adequate sites which will be made available through appropriate zoning and development standards and with public services and facilities needed to facilitate and encourage the development of a variety of types of housing for all income levels, including rental housing, factory-built housing and mobilehomes, in order to meet the community's housing goals as identified in subdivision (b).

(2) Assist in the development of adequate housing to meet the needs of low- and moderate-income households.

(3) Address and, where appropriate and legally possible, remove governmental constraints to the maintenance, improvement, and development of housing.

(4) Conserve and improve the condition of the existing affordable housing stock.

(5) Promote housing opportunities for all persons regardless of race, religion, sex, marital status, ancestry, national origin, or color.

The program shall include an identification of the agencies and officials responsible for the implementation of the various actions and the means by which consistency will be achieved with other general plan elements and community goals. The local government shall

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make a diligent effort to achieve public participation of all economic segments of the community in the development of the housing element, and the program shall describe this effort.

(Added by Stats.1980, c. 1143, p. 3697, § 3.)

Library References

Zoning and Planning § 11.5.

C.J.S. Zoning and Land Planning § 48.

Notes of Decisions

1. In general

Standing to challenge exclusionary zoning practices in California did not depend upon plaintiffs showing "substantial probability" that their injustices would not exist but for such practices; it was sufficient that plaintiffs showed causal relationship by alleging that city's zoning

practices had excluded them from desired residency in the city or that such practices had raised their housing costs outside such city by adversely affecting regional housing market. *Stocks v. City of Irvine* (1981) 170 Cal.Rptr. 724, 111 C.A.3d 520.

§ 65584. Locality's share of regional housing needs; determination and distribution; revision

(a) For purposes of subdivision (a) of Section 65583, a locality's share of the regional housing needs includes that share of the housing need of persons at all income levels within the area significantly affected by a jurisdiction's general plan. The distribution of regional housing needs shall, based upon available data, take into consideration market demand for housing, employment opportunities, the availability of suitable sites and public facilities, commuting patterns, type and tenure of housing need, and the housing needs of farmworkers. The distribution shall seek to avoid further impaction of localities with relatively high proportions of lower income households. Based upon data provided by the Department of Housing and Community Development relative to the statewide need for housing, each council of governments shall determine the existing and projected housing need for its region. The Department of Housing and Community Development shall ensure that this determination is consistent with the statewide housing need and may revise the determination of the council of governments if necessary to obtain this consistency. Each locality's share shall be determined by the appropriate council of governments consistent with the criteria above with the advice of the department subject to the procedure established pursuant to subdivision (c).

(b) For areas with no council of governments, the Department of Housing and Community Development shall determine housing market areas and define the regional housing need for localities within these areas. Where the department determines that a local gov-

ernment possesses the capability and resources and has agreed to accept the responsibility, with respect to its jurisdiction, for the identification and determination of housing market areas and regional housing needs, the department shall delegate this responsibility to the local governments within these areas.

(c) Within 90 days following a determination of a council of governments pursuant to subdivision (a), or the department's determination pursuant to subdivision (b), a local government may revise the definition of its share of the regional housing need. The revised share shall be based upon available data and accepted planning methodology, and supported by adequate documentation. Within 60 days of the local government's revision, the council of governments or the department, as the case may be, shall accept the revision or shall indicate, based upon available data and accepted planning methodology, why the revision is inconsistent with the regional housing need. The housing element shall contain an analysis of the factors and circumstances, with all supporting data, justifying the revision. All materials and data used to justify any revision shall be made available upon request by any interested party within 45 days upon payment of reasonable costs of reproduction unless such costs are waived due to economic hardship.

(d) Any authority to review and revise a local government's share of the regional housing need granted under this section shall not constitute authority to revise, approve, or disapprove the manner in which the local government's share of the regional housing need is implemented through its housing program.

(Added by Stats.1980, c. 1143, p. 3697, § 3.)

§ 65585. Guidelines in preparation and amendment of housing element; submission and review; advisory findings; final adoption

(a) Each city, county, and city and county shall consider the guidelines adopted by the Department of Housing and Community Development pursuant to Section 50459 of the Health and Safety Code in preparation and amendment of the housing element pursuant to this article. Such guidelines shall be advisory to each local government in order to assist it in the preparation of its housing element.

(b) At least 90 days prior to adoption of the housing element pursuant to this article and Section 65357, or at least 45 days prior to the adoption of an amendment to this element, the planning agency of a city, county, or city and county shall submit a draft of the element or amendment to the Department of Housing and Community

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pand housing opportunities and accommodate the housing needs of Californians of all economic levels.

(c) The provision of housing affordable to low- and moderate-income households requires the cooperation of all levels of government.

(d) Local and state governments have a responsibility to use the powers vested in them to facilitate the improvement and development of housing to make adequate provision for the housing needs of all economic segments of the community.

(e) The Legislature recognizes that in carrying out this responsibility, each local government also has the responsibility to consider economic, environmental, and fiscal factors and community goals set forth in the general plan and to cooperate with other local governments and the state in addressing regional housing needs.

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pand housing opportunities and accommodate the housing needs of Californians of all economic levels.

(c) The provision of housing affordable to low- and moderate-income households requires the cooperation of all levels of government.

(d) Local and state governments have a responsibility to use the powers vested in them to facilitate the improvement and development of housing to make adequate provision for the housing needs of all economic segments of the community.

(e) The Legislature recognizes that in carrying out this responsibility, each local government also has the responsibility to consider economic, environmental, and fiscal factors and community goals set forth in the general plan and to cooperate with other local governments and the state in addressing regional housing needs.

(Added by Stats.1980, c. 1143, p. 3697, § 3.)

§ 65581. Intent of legislature

It is the intent of the Legislature in enacting this article:

(a) To assure that counties and cities recognize their responsibilities in contributing to the attainment of the state housing goal.

(b) To assure that counties and cities will prepare and implement housing elements which, along with federal and state programs, will move toward attainment of the state housing goal.

(c) To recognize that each locality is best capable of determining what efforts are required by it to contribute to the attainment of the state housing goal, provided such a determination is compatible with the state housing goal and regional housing needs.

(d) To ensure that each local government cooperates with other local governments in order to address regional housing needs.

(Added by Stats.1980, c. 1143, p. 3697, § 3.)

§ 65582. Definitions

As used in this article:

(a) "Community," "locality," "local government," or "jurisdiction", means a city, city and county, or county.

(b) "Department" means the Department of Housing and Community Development.

(c) "Housing element" or "element" means the housing element of the community's general plan, as required pursuant to this article and subdivision (c) of Section 65302.

(Added by Stats.1980, c. 1143, p. 3697, § 3.)

Words

§ 65

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Words and Phrases (Perm.Ed.)

§ 65583. Contents of housing element

The housing element shall consist of an identification and analysis of existing and projected housing needs and a statement of goals, policies, quantified objectives, and scheduled programs for the preservation, improvement, and development of housing. The housing element shall identify adequate sites for housing, including rental housing, factory-built housing, and mobilehomes, and shall make adequate provision for the existing and projected needs of all economic segments of the community. The element shall contain all of the following:

(a) An assessment of housing needs and an inventory of resources and constraints relevant to the meeting of these needs. The assessment and inventory shall include the following:

(1) Analysis of population and employment trends and documentation of projections and a quantification of the locality's existing and projected housing needs for all income levels. Such existing and projected needs shall include the locality's share of the regional housing need in accordance with Section 65584.

(2) Analysis and documentation of household characteristics, including level of payment compared to ability to pay, housing characteristics, including overcrowding, and housing stock condition.

(3) An inventory of land suitable for residential development, including vacant sites and sites having potential for redevelopment, and an analysis of the relationship of zoning and public facilities and services to these sites.

(4) Analysis of potential and actual governmental constraints upon the maintenance, improvement, or development of housing for all income levels, including land use controls, building codes and their enforcement, site improvements, fees and other exactions required of developers, and local processing and permit procedures.

(5) Analysis of potential and actual nongovernmental constraints upon the maintenance, improvement, or development of housing for all income levels, including the availability of financing, the price of land, and the cost of construction.

(6) Analysis of any special housing needs, such as those of the handicapped, elderly, large families, farmworkers, and families with female heads of households.

(7) Analysis of opportunities for energy conservation with respect to residential development.

(b) A statement of the community's goals, quantified objectives, and policies relative to the maintenance, improvement, and development of housing.

It is recognized that the total housing needs identified pursuant to subdivision (a) may exceed available resources and the community's ability to satisfy this need within the content of the general plan requirements outlined in Article 5 (commencing with Section 65300). Under these circumstances, the quantified objectives need not be identical to the identified existing housing needs, but should establish the maximum number of housing units that can be constructed, rehabilitated, and conserved over a five-year time frame.

(c) A program which sets forth a five-year schedule of actions the local government is undertaking or intends to undertake to implement the policies and achieve the goals and objectives of the housing element through the administration of land use and development controls, provision of regulatory concessions and incentives, and the utilization of appropriate federal and state financing and subsidy programs when available. In order to make adequate provision for the housing needs of all economic segments of the community, the program shall do all of the following:

(1) Identify adequate sites which will be made available through appropriate zoning and development standards and with public services and facilities needed to facilitate and encourage the development of a variety of types of housing for all income levels, including rental housing, factory-built housing and mobilehomes, in order to meet the community's housing goals as identified in subdivision (b).

(2) Assist in the development of adequate housing to meet the needs of low- and moderate-income households.

(3) Address and, where appropriate and legally possible, remove governmental constraints to the maintenance, improvement, and development of housing.

(4) Conserve and improve the condition of the existing affordable housing stock.

(5) Promote housing opportunities for all persons regardless of race, religion, sex, marital status, ancestry, national origin, or color.

The program shall include an identification of the agencies and officials responsible for the implementation of the various actions and the means by which consistency will be achieved with other general plan elements and community goals. The local government shall

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make a diligent effort to achieve public participation of all economic segments of the community in the development of the housing element, and the program shall describe this effort.

(Added by Stats.1980, c. 1143, p. 3697, § 3.)

Library References

Zoning and Planning ⇨11.5.

C.J.S. Zoning and Land Planning § 48.

Notes of Decisions

1. In general

Standing to challenge exclusionary zoning practices in California did not depend upon plaintiffs showing "substantial probability" that their injustices would not exist but for such practices; it was sufficient that plaintiffs showed causal relationship by alleging that city's zoning

practices had excluded them from desired residency in the city or that such practices had raised their housing costs outside such city by adversely affecting regional housing market. *Stocks v. City of Irvine* (1981) 170 Cal.Rptr. 721, 114 C. A.3d 520.

§ 65584. Locality's share of regional housing needs; determination and distribution; revision

(a) For purposes of subdivision (a) of Section 65583, a locality's share of the regional housing needs includes that share of the housing need of persons at all income levels within the area significantly affected by a jurisdiction's general plan. The distribution of regional housing needs shall, based upon available data, take into consideration market demand for housing, employment opportunities, the availability of suitable sites and public facilities, commuting patterns, type and tenure of housing need, and the housing needs of farmworkers. The distribution shall seek to avoid further impactation of localities with relatively high proportions of lower income households. Based upon data provided by the Department of Housing and Community Development relative to the statewide need for housing, each council of governments shall determine the existing and projected housing need for its region. The Department of Housing and Community Development shall ensure that this determination is consistent with the statewide housing need and may revise the determination of the council of governments if necessary to obtain this consistency. Each locality's share shall be determined by the appropriate council of governments consistent with the criteria above with the advice of the department subject to the procedure established pursuant to subdivision (c).

(b) For areas with no council of governments, the Department of Housing and Community Development shall determine housing market areas and define the regional housing need for localities within these areas. Where the department determines that a local gov-

ernment possesses the capability and resources and has agreed to accept the responsibility, with respect to its jurisdiction, for the identification and determination of housing market areas and regional housing needs, the department shall delegate this responsibility to the local governments within these areas.

(c) Within 90 days following a determination of a council of governments pursuant to subdivision (a), or the department's determination pursuant to subdivision (b), a local government may revise the definition of its share of the regional housing need. The revised share shall be based upon available data and accepted planning methodology, and supported by adequate documentation. Within 60 days of the local government's revision, the council of governments or the department, as the case may be, shall accept the revision or shall indicate, based upon available data and accepted planning methodology, why the revision is inconsistent with the regional housing need. The housing element shall contain an analysis of the factors and circumstances, with all supporting data, justifying the revision. All materials and data used to justify any revision shall be made available upon request by any interested party within 45 days upon payment of reasonable costs of reproduction unless such costs are waived due to economic hardship.

(d) Any authority to review and revise a local government's share of the regional housing need granted under this section shall not constitute authority to revise, approve, or disapprove the manner in which the local government's share of the regional housing need is implemented through its housing program.

(Added by Stats.1980, c. 1143, p. 3697, § 3.)

§ 65585. Guidelines in preparation and amendment of housing element; submission and review; advisory findings; final adoption

(a) Each city, county, and city and county shall consider the guidelines adopted by the Department of Housing and Community Development pursuant to Section 50459 of the Health and Safety Code in preparation and amendment of the housing element pursuant to this article. Such guidelines shall be advisory to each local government in order to assist it in the preparation of its housing element.

(b) At least 90 days prior to adoption of the housing element pursuant to this article and Section 65357, or at least 45 days prior to the adoption of an amendment to this element, the planning agency of a city, county, or city and county shall submit a draft of the element or amendment to the Department of Housing and Community

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CITY OF LODI



HOUSING ELEMENT

CITY OF LODI

HOUSING ELEMENT

Adopted _____, 1983

COUNCIL MEMBERS

Evelyn Olson, Mayor
Robert Murphy
James Pinkerton
Fred Reid
Randy Snider

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INTRODUCTION

THE HOUSING PROBLEM

It is the intent of this Housing Element to provide a statement of City policy concerning housing and the specific implementation measures necessary to accomplish designated housing goals.

Additionally, this document is intended to satisfy State and Federal requirements for local housing planning and is in compliance with the "Housing Element Guidelines" developed by the California Department of Housing and Community Development.

The California State Legislature, in the Housing and Home Finance Act of 1975, stated the following:

1. "The subject of housing is of vital statewide importance to the health, safety and welfare of the residents of this state."
2. "...the provision of a decent home and a suitable environment for every American family (is a national goal established by the Congress of the United States) and the (California) Legislature finds and declares that the attainment of this goal is a priority of the highest order."
3. "...there exists within the urban and rural areas of the state a serious shortage of decent, safe and sanitary housing, which persons and families of low or moderate income including the elderly and the handicapped, can afford."

Recognizing that the local housing market area extends beyond Lodi's City boundaries, this Housing Element is also a response to the housing needs of a fair share of those households who do not presently live within the City but whose housing opportunities are nevertheless affected by the planning decisions of the City.

The text is organized into four major sections:

I. Pertinent Data

This section includes demographic data related to the analysis of housing needs. The data is listed by individual census tract and the entire City limits. The majority of the information is derived from the 1980 Census figures and can be easily updated upon receipt of future decennial information.

II. Housing Needs and Constraints.

Present and future housing needs are analyzed. Obstacles to meeting these needs are also examined.

III. The Housing Program.

It is in this section that the means of accomplishing specific housing goals are listed. Discussion of existing efforts is included as well as a designation of target areas where the application of housing programs will be concentrated.

IV. Environmental Documentation.

A copy of the Negative Declaration for the Housing Element is included.

CITY OF LODI

HOUSING GOALS

1. Decent, safe, sanitary and affordable housing shall be available for all segments of the community.
2. The construction of housing for special groups such as the elderly, handicapped, minorities, large families and migrant farm workers will be encouraged.
3. The City will pursue housing conservation efforts to prevent the loss of existing housing units in order to maintain the availability of existing lower cost housing.
4. An orderly, contiguous growth pattern will be maintained while insuring land for future residential use.
5. The quality and diversity of Lodi's existing residential areas will be maintained and improved.
6. The provision of adequate housing opportunities should not negatively alter the present quality of Lodi's physical environment.
7. The disruption of viable agricultural areas shall be minimized.
8. Buildings of historic importance will be protected and maintained.
9. The application of energy efficient design and technology to existing housing and subdivisions will be encouraged.
10. Attempts will be made toward eliminating housing discrimination in Lodi.

PRINCIPLE HOUSING FINDINGS

STATEWIDE

- o An average of 315,000 housing units need to be built annually through 1985.
- o Approximately 4 percent (365,000) of existing housing units need to be replaced.
- o Nine percent (860,000) of existing housing units need to be rehabilitated.
- o 23% of all low income households pay more than 25% of their income for housing.
- o The median price of a home in California in 1980 was \$97,961 while nationwide the median price was \$62,060.
- o 430,000 households are overcrowded.

The following conditions contribute to California housing problem:

- o The post-war baby boom generation is moving into the household formation period.
- o Net immigration into California is on the rise.
- o The number of households has increased due to high divorce rates and professional men and women marrying later.
- o Housing lots have become increasingly scarce in California's metropolitan areas.
- o High inflation has caused savers to turn to other investments, thus making mortgage funds from banks and savings and loans scarce and available only at high interest rates.
- o Land use regulations, permits and everchanging building standards are increasing housing costs.
- o Californians now pay an average of 37% of their income towards house payments. (Nationally, house payments average 24% of income).

1. SOURCE: Cal Tax Research Bulletin, October 1981 pg. 3

PRINCIPLE FINDINGS

CITY OF LODI

- o The bulk of Lodi's population is getting older. This affects the housing market in terms of the number of housing units required as well as their size, type, and location.
- o The number of persons per household has decreased from 2.9 in 1970 to 2.38 in 1980.
- o Nearly 50% of Lodi's 1980 housing stock was built prior to 1960.
- o As a result of Measure A (page IX), the amount of land assumed to be available for residential development has been drastically reduced. This will result in limiting future development to those areas already in the City and encouragement of higher density development in accordance with the Zoning Ordinance, to achieve the Housing Goals as specified in this document.
- o 1,866 households in Lodi were in need of housing assistance in 1979.
- o Low and moderate income families are, for the most part, excluded from the new homeownership market.

- o The primary source of affordable and decent housing for low and moderate income households is in the rehabilitation and preservation of the existing housing stock.

- o Housing deficiency and needs are directly related to problems encountered in employment, education, community health and other socio-economic areas.

PREFACE

The figures in this document are based primarily upon 1980 U. S. Census information and as such may differ slightly from previously published City reports including the Development Information Booklet. Every attempt was made to obtain the most recent information available. In those cases where the information was not yet available from 1980 Census publications, previous data was utilized.

MEASURE A

THE GREENBELT INITIATIVE

On August 25, 1981, the voters of the City of Lodi approved an initiative ordinance which eliminated the City's Planned Urban Growth Area from the Land Use Element of the General Plan. The effect of this Ordinance was to establish the new urban growth boundary at the city limits as shown on Exhibit A. At the present time, annexation of County property to the City for urban development purposes is not possible without an amendment to the Land Use Element of the General Plan.

The effects of this initiative upon housing cannot be determined at this time. It has affected the assumptions concerning housing since properties once considered potentially buildable are now excluded. If construction is to occur, it will be limited to those areas already within the City limits. Any direct relationship between the Greenbelt Initiative and fluctuations in construction activity cannot be proved due to innumerable other variables which include interest rates, availability and development of land in nearby areas, and weather conditions.

It is anticipated that as the amount of vacant City land decreases, two things will occur:

1. The price of remaining vacant land will increase, and
2. The development that will occur, in all probability, will be at a higher density (units per acre) due to increased land costs.

SECTION I
BACKGROUND DATA

POPULATION CHARACTERISTICS

Present and Projected Population

Between the years 1960 and 1980 the population of Lodi grew at an annual rate of 2.33 percent. The 1960 population of 22,229 increased to 28,691 in 1970 and 35,221 in 1980. Although the population has steadily increased, the annual rate of growth has varied from 3.31 percent (1960 - 1966) to 1.51 percent (1966 - 1970). In the five year period between 1975 and 1980, Lodi grew 2.01 percent annually (Exhibit 1). Lodi's population growth has been approximately equal to that of San Joaquin County.



**EXHIBIT 1
CITY OF LODI • POPULATION GROWTH • 1950-1980**

YEAR	POPULATION	YEARS	ACTUAL INCREASE	ANNUAL GROWTH RATE
1950	13798	1950-1955	3622	5.25%
1955	17420	1955-1960	4809	5.5%
1960	22229	1960-1965	3682	3.3%
1965	25911	1965-1970	2780	2.1%
1970	28691	1970-1975	3374	2.35%
1975	32065	1975-1980	3156	1.97%
1980	35221	1950-1980	21423	3.41%*

*Average Annual Growth

Exhibit 2 shows the distribution of the 1980 population by census tract.

Exhibit 3 shows the projected Lodi population. The figures given reflect the assumption that Lodi will continue to grow at a steady rate.

NOTE: It should be emphasized that these figures do not take into account the potential effects of the Greenbelt Initiative, Measure A, which was passed by the electorate on August 25, 1981 and is discussed in more detail on page VIII of this report. The effects of this initiative upon housing cannot be predicted at this time. It is certain to at least limit the amount of available acreage for residential development. Whether this will have an effect upon the number of annual units constructed is yet to be seen.

EXHIBIT 2
CITY OF LODI • POPULATION BY
CENSUS TRACT • 1980

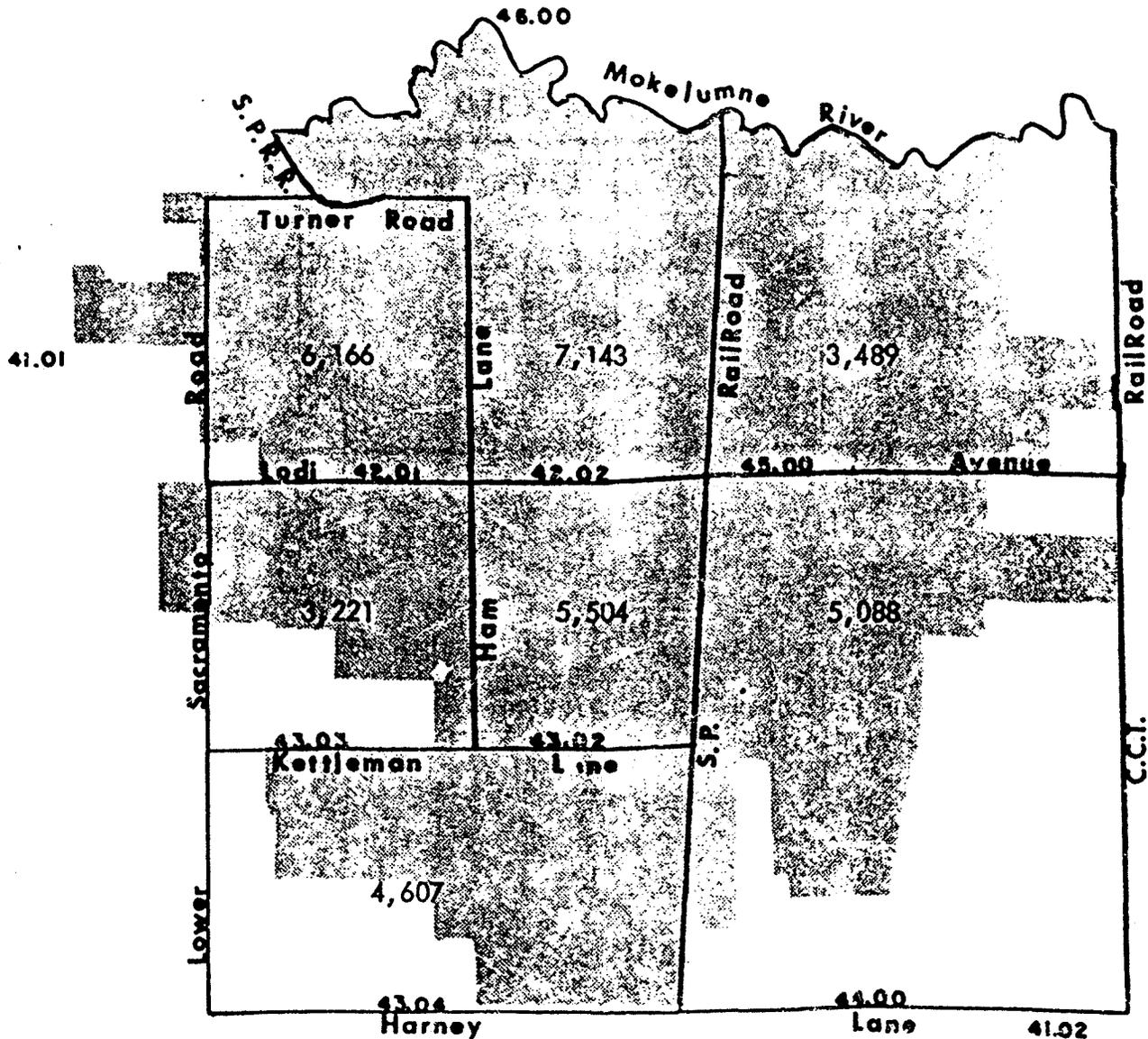


EXHIBIT 4 POPULATION CHARACTERISTICS 1960-70-80

	POPULATION			PERCENT INCREASE			MEDIAN AGE				RACIAL DISTRIBUTION					
	1960 NO.	1970 NO.	1980 NO.	1960 1970	1970 1980	% of CO.	Male 1970	Female 1980	1970	1980	Black 1970	Spanish ² 1980	White 1970	White 1980		
LODI	22,229	28,691	35,221	29.1	22.7	10.1	32.6	32.4	34.5	35.2	0.1	.06	9.7	10.0	-	9.02
STOCKTON (Planning area)	155,221	175,508	149,779	13.07	17.03	-	-	-	-	29.2	-	5.5	-	19	-	65.4
SAN JOAQUIN CO.	249,989	291,016	347,342	-	-	-	-	29.1	-	30.7	-	10	-	22	-	76

RACIAL COMPOSITION

Of the 35,221 persons residing in Lodi in 1980, 90.3% were white. The category, white, includes all persons with European backgrounds. This means that most persons with Spanish surnames are counted as white and tabulated a second time under the category "Persons of Spanish Origin".

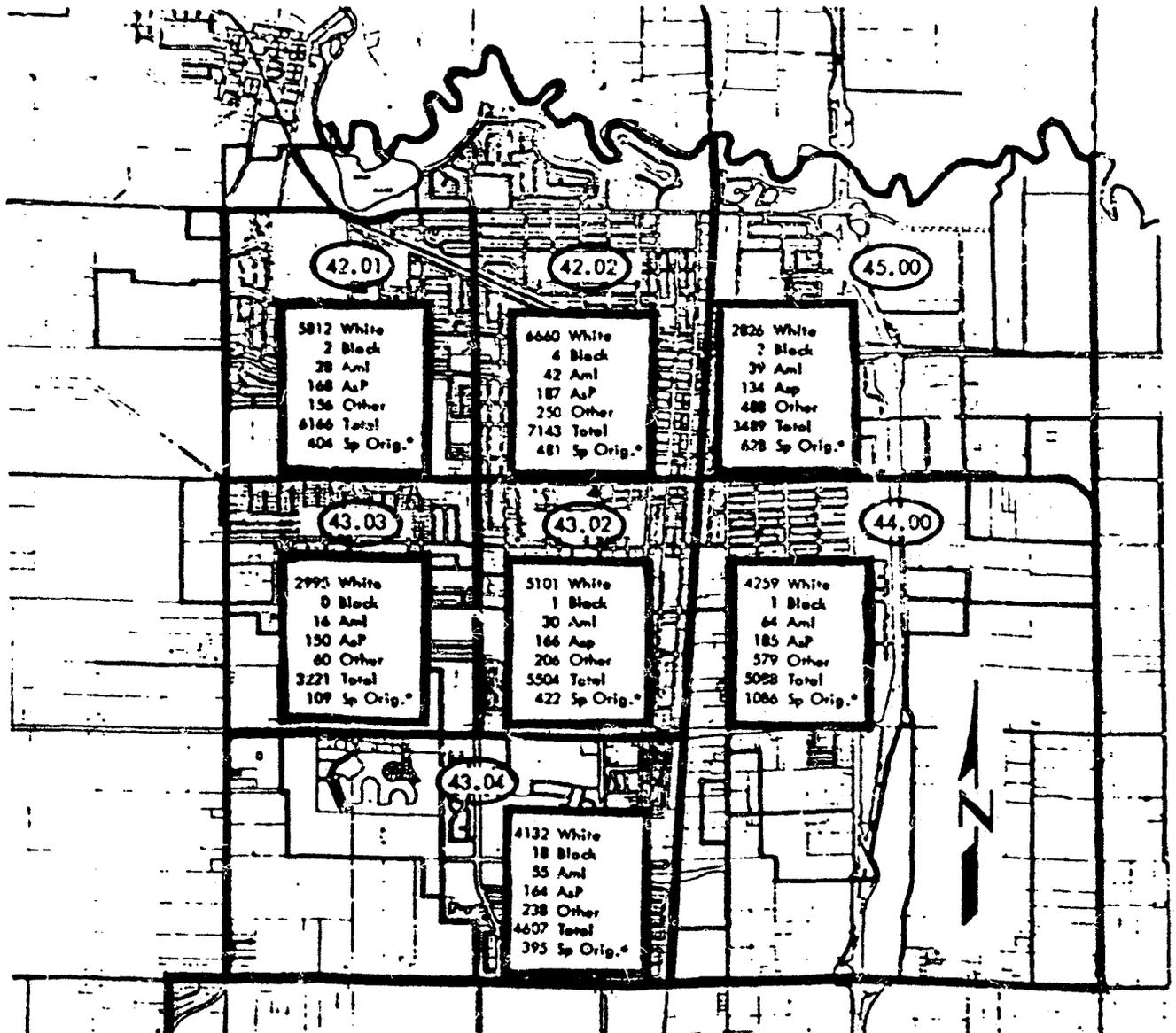
3.3 percent of the population was Asian or Pacific Islander, 0.8% American Indian, Eskimo or Aleut. Twenty-eight Black persons accounted for 0.1% of the total city population. All other races not itemized by the census accounted for 5.6%.

EXHIBIT 5 RACIAL DISTRIBUTION BY CENSUS TRACT 1980

RACE	42.01	42.02	43.02	43.03	43.04	44.00	45.00	TOTAL	% OF POPULA.
WHITE	5812	6660	2995	5101	4132	4259	2826	31785	90.2%
BLACK	2	4	1	0	18	1	2	28	.079%
SP. ORIG	404	481	422	109	395	1086	628	3525	10%
TOTAL POP- CENSUS TRACT	6166	7143	5504	3221	4607	5088	3489	35221	



EXHIBIT 6 RACIAL DATA 1980



CENSUS TRACT	42.01	42.02	43.03	43.02	43.04	44.00	45.00	TOTAL	TOTAL POPULATION
TOTAL POPULATION	3	6,166	7,143	5,504	3,221	6,607	3,089	35,221	100%
WHITE	3	5,812	6,660	5,101	2,995	4,137	4,259	31,708	90.2%
BLACK		2	4	1	0	18	1	28	.08%
ANI	0	28	62	30	16	55	64	274	.78%
ASP	0	168	187	166	150	164	185	1,154	3.28%
OTHER	0	156	250	206	60	238	579	1,977	5.62%
SP. ORIG*	0	404	481	422	109	395	628	3,525*	10%

LEGEND

WHITE
BLACK
ANI - American Indian, Eskimo or Aleut
ASP - Asian and Pacific Islander (incl. Japanese, Chinese, Filipino, Korean, Asian Indian, Vietnamese, Hawaiian, Guamanian, Samoan).
OTHER - Not specified by Census Ct.
* SP. ORIG - Persons of Spanish origin (including Mexican, Puerto Rican, Cuban, and other Spanish) Persons of Spanish origin may be of any race.

SOURCE: U.S. Department of Commerce, Bureau of the Census, 1980 Census, Washington, D.C., 1980

AGE CHARACTERISTICS

As a result of declining birthrates over the past 10 years, the bulk of Lodi's population is getting older. This trend is generally consistent throughout San Joaquin County and the United States. While the 1960 census figures indicated the largest population concentration to be in the 0 - 5 year category, the 1980 census figures show the 15 - 24 year category as the largest. (see Exhibit 8).

Countywide the number of children less than ten years old declined by nearly 6,000 from 1960 - 1975 despite an increase in total population by 50,000

While the younger population has been declining, the older population (countywide) increased by over 18,500 from 1960 - 1975 which accounted for nearly 40% of the growth during that period.

The increasing age of the population affects the housing market in terms of the number of housing units needed as well as the size and type of housing required. Among the effects of a reduction in the birthrate is an increased need for smaller units and less demand for school facilities.



EXHIBIT 8 POPULATION DISTRIBUTION BY AGE & SEX 1980

AGE GROUP

75 +

65 - 74

55 - 64

45 - 54

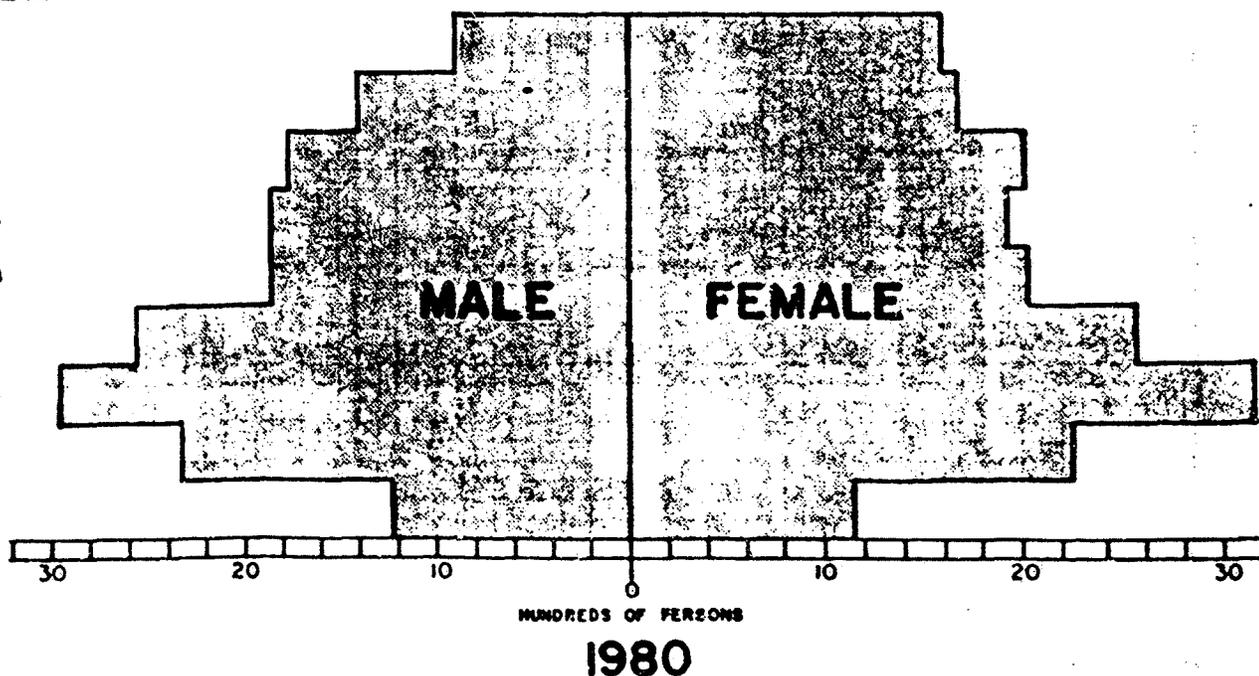
35 - 44

25 - 34

15 - 24

5 - 14

under - 5



Source: 1980 Census of San Joaquin County.



EXHIBIT 9 POPULATION DISTRIBUTION BY AGE & SEX 1980

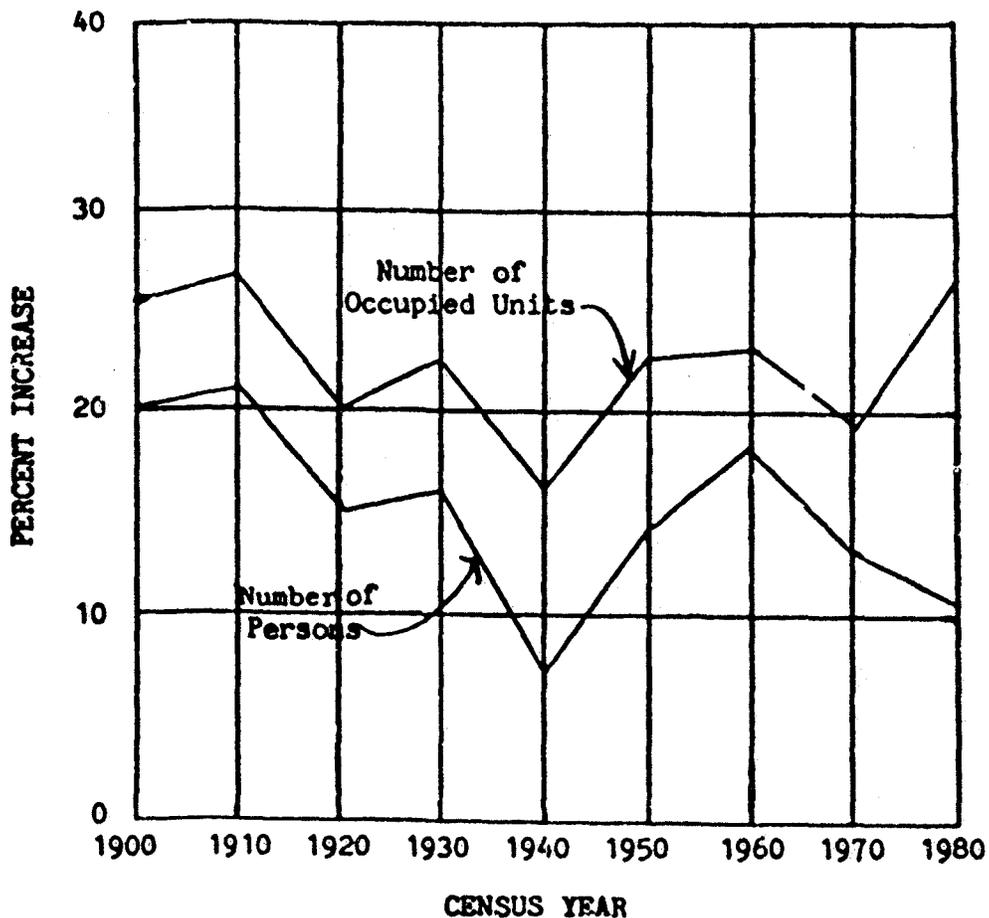
CENSUS TRACT	SEX	AGE											TOTAL
		0-4	5-9	10-14	15-19	20-24	25-34	35-44	45-54	55-64	65-74	75 Yrs +	
42.01	MALE	185	202	229	293	226	429	381	378	331	212	90	2956
	Percent	3.0	3.2	3.7	4.7	3.6	6.9	6.1	6.1	5.3	3.4	1.4	48.0
42.02	FEMALE	182	187	247	317	231	461	461	399	365	230	130	3210
	Percent	2.9	3.0	4.0	5.1	3.7	7.4	7.4	6.4	5.9	3.7	2.1	52.0
43.02	MALE	232	176	222	288	304	431	349	402	428	329	218	3379
	Percent	3.2	2.4	3.1	4.0	4.2	6.0	4.8	5.6	6.0	4.6	3.0	47.3
43.03	FEMALE	136	200	213	345	267	457	402	411	494	416	423	3764
	Percent	1.9	2.7	3.0	4.8	3.7	6.4	5.6	5.8	6.9	5.8	5.9	52.6
43.04	MALE	130	109	131	183	178	301	213	279	343	290	259	2416
	Percent	2.4	2.0	2.4	3.3	3.2	5.5	3.9	5.1	6.2	5.3	4.7	44.0
43.05	FEMALE	142	125	136	202	228	302	242	337	432	391	551	3088
	Percent	2.5	2.3	2.5	3.7	4.1	5.4	4.4	6.1	7.8	7.1	10.0	56.0
44.00	MALE	93	131	158	175	92	184	243	254	177	87	128	1622
	Percent	2.8	4.1	4.9	5.4	2.8	5.7	7.5	7.9	5.4	2.7	.87	50.3
44.01	FEMALE	72	127	134	162	62	228	275	250	177	73	39	1599
	Percent	2.2	3.9	4.2	5.0	1.9	7.0	8.5	7.8	5.4	2.3	1.2	49.7
44.02	MALE	231	193	208	211	232	545	302	356	111	85	38	2512
	Percent	4.8	4.0	4.3	4.4	4.8	11.3	6.2	7.4	2.3	1.8	.79	52.1
44.03	FEMALE	204	198	195	222	276	496	267	148	116	110	72	2304
	Percent	4.2	4.1	4.0	4.6	5.7	10.2	5.5	3.0	2.4	2.3	1.4	47.8
45.00	MALE	281	211	169	157	298	422	213	210	197	192	139	2489
	Percent	5.5	4.1	3.3	3.1	5.9	8.3	4.2	4.1	3.9	3.8	2.7	49.0
45.01	FEMALE	235	173	142	228	310	381	229	225	218	228	230	2599
	Percent	5.4	4.0	3.3	5.3	7.2	8.8	5.3	5.2	50.0	5.3	5.3	51.0
45.02	MALE	132	91	88	133	196	263	147	170	175	198	134	1727
	Percent	3.8	2.6	2.5	3.8	5.6	7.5	4.2	4.9	5.0	5.7	3.8	49.0
45.03	FEMALE	140	105	74	134	186	226	139	153	219	228	158	1762
	Percent	4.0	3.0	2.1	3.8	5.3	6.5	4.0	4.4	6.3	6.5	4.5	50.5
TOTAL	MALE	1234	1113	1205	1440	1526	2575	1848	1840	1772	1393	907	16853
	Percent	3.5	3.2	3.4	4.1	4.3	7.3	5.2	5.2	5.0	4.0	2.6	47.8
TOTAL	FEMALE	1161	1115	1141	1610	1560	2551	2015	1923	2012	1676	1604	18368
	Percent	3.3	3.2	3.2	4.6	4.4	7.2	5.7	5.5	5.7	4.8	4.5	52.2
TOTAL	TOTAL	2395	2228	2346	3050	3085	5126	3863	3763	3784	3069	2511	35221
	Percent	6.8	6.3	6.7	8.7	8.8	14.6	11.0	10.7	10.7	8.7	7.1	100.0

**DIFFERENTIAL BETWEEN RATES OF INCREASE
FOR POPULATION AND HOUSING**

The 1980 census was the first in the twentieth century to show a divergence in the growth rate of population and housing. Although previously moving almost in parallel, the growth rate for housing increased between 1970 and 1980 while the growth rate for the population declined. As a result, there was a greater supply of housing units in relation to total population than ever before in our history.

According to the 1980 Census, the median number of persons per household was 2.17. Owner-occupied units had a slightly higher median, 2.32; while renter-occupied units had a median of 1.89 persons per unit. A comparison of the growth rates for total population and occupied housing is shown below.

 **EXHIBIT 10
PERCENT INCREASE FOR PERSONS &
HOUSING UNITS U.S. 1900 TO 1980**



Source: 1980 Census Update, July 81, p.1, Dept. of Commerce, Bureau of the Census.

HOUSEHOLD INCOME

The following data has been taken from the 1980 Census figures. Exhibit 10 provides an overview of income characteristics. Median incomes by Census Tract are significant in that they provide a means for comparison both locally and on a countywide basis.

The information pertaining to poverty levels is important and illustrates the following conclusions:

- o Female headed families are highly susceptible to poverty status with 3 out of every 10 female headed families so classified.
- o 8.9% of all persons age 65 or older had incomes below the poverty level.
- o 27.1% of all unrelated individuals have incomes below the poverty level.



EXHIBIT 11 POPULATION INCOME CHARACTERISTICS 1980

POPULATION GROUPS LEVEL	TOTAL PERSONS	# OF PERSONS W/ INCOMES BETWEEN 100% AND 124% OF POVERTY LEVEL	# OF PERSONS W/ INCOMES BETWEEN 100% AND 124% OF POVERTY LEVEL	# OF PERSONS BELOW POVERTY LEVEL	% OF PERSONS BELOW POV.
Persons over 65 yrs.	5580	420	44.6%	490	15.1%
Persons in Female Headed Families w/ Children under 18 yrs. old	827	N/A	N/A	364	11.22%
Persons in Non-Elderly & Other Low-Income Families	27,972	311	55.4%	1510	46.6%
TOTAL	35,221	942	100.0%	3243	100.0%

SOURCE: 1980 Census of Population and Housing

1. 1980 Census, Poverty threshold for all non-farm persons:
 All unrelated individuals: \$3,689
 All families:
 2 persons: \$4,725
 3 persons: \$5,784
 4 persons: \$7,412
 5 persons: \$8,775
 6 persons: \$9,914
 7 or more: \$12,280

SOURCE: Statistical Abstract, Dept. of Commerce, 1981
Table No. 744, p. 445.



EXHIBIT 12 VERY LOW INCOME POPULATION GROUPS 1980

CENSUS TRACT NO.	42.01	42.02	43.02	43.03	43.04	44.00	45.00
Persons Below Poverty Level	343	534	409	90	301	978	588
% of Persons Below Poverty Level	5.6	7.6	7.4	2.8	6.5	19.2	17.0
% of All Persons Receiving Soc. Sec. Income	9.7	13.3	15.9	6.3	6.3	14.0	16.9
# of Families Below Poverty Level w/Female Head	41	34	32	0	23	172	62
# of Families w/Female Head w/Children Under 18	140	151	118	41	109	182	97
% of Persons Under Poverty Level 65 and Older	5.0	.59	1.4	.19	.72	2.7	1.8
% of White Households Below Poverty Level	6.0	6.3	7.6	2.9	5.6	17.3	16.3
% of Spanish Households Below Poverty Level	2.7	11.7	14.6	N/A*	14.5	14.2	23.1
% of Asian Households Below Poverty Level	N/A*	29.8	N/A*	2.7	N/A	31.1	5.5%

SOURCE: 1980 CENSUS OF POPULATION AND HOUSING

CITY OF LODI

PERCENT OF ALL FAMILIES BELOW POVERTY LEVEL

	LODI	STOCKTON SMSA*	SAN JOAQUIN COUNTY	CALIF. STATE
Percent of all Families	9.4	13.3	13.3	10.4

SOURCE: 1980 CENSUS OF POPULATION AND HOUSING AND DEPARTMENT OF COMMERCE COUNTY AND CITY DATA BOOK.

*Standard Metropolitan Statistical Area.

CITY OF LODI

MEDIAN INCOMES: 1980 - STATE, COUNTY, CITY AND CENSUS TRACTS

LODI CITY	42.01	42.02	43.02	43.03	43.04	44.00	45.00	COUNTY	STATE
\$19,843	\$22,131	\$22,089	\$19,728	\$28,278	\$20,527	\$12,009	\$14,000	\$19,120	\$25,109

 **EXHIBIT 13**
INCOME CHARACTERISTICS BY CENSUS TRACT

CENSUS TRACT	PERCENT RENTERS	PERCENT LOW INCOME	PERCENT VERY LOW INCOME	PERCENT UNDER THE POVERTY LEVEL
42.01	25%	29%	13%±	5.6%
42.02	35%	23%	20%	8%
43.02	36%	30%	21%	8%
43.03	10%	20%	6%	3% ²
43.04	49%	36%	12%	7%
44.00	53%	35%	40%	19%
45.00	54%	40%	35%	20%
CITY AVERAGE	38%	30%	21%	9%

1. Families in the low income category annually earn more than 50%, but not more than 100% of the county median
2. Families in the very low income category annually earn no more than 50% of county median income.

SOURCE: 1980 U.S. Census.

 **EXHIBIT 14**
POVERTY STATUS BY RACE / ETHNICITY

	WHITE	INDIAN	ASIAN	SPANISH	TOTAL
ABOVE POVERTY	28,574	240	1,221	3,066	31,268
BELOW POVERTY	2,624 (9%)	66 (27.5)	169 (13.8%)	483 (15.75%)	3,243 (10.4%)

 **EXHIBIT 15**
INCOME STRATA • 1980

INCOME LEVEL	TOTAL NO. FAMILIES	PERCENT OF TOTAL FAMILIES						
Very Low ¹	2,045±	21%						
Low ²	2,948	30%						
<p>¹ Families in the Very Low category annually earn no more than 50% of the 1980 County median income.</p> <p>² Families in the Low category annually earn more than 50% but no more than 100% of the 1980 County median income.</p>								
<p style="text-align: center;">1980 Median Incomes</p> <table style="margin-left: auto; margin-right: auto;"> <tr> <td>Lodi</td> <td style="text-align: right;">\$ 19,843</td> </tr> <tr> <td>San Joaquin County</td> <td style="text-align: right;">\$ 19,120</td> </tr> <tr> <td>California</td> <td style="text-align: right;">\$ 25,109</td> </tr> </table>			Lodi	\$ 19,843	San Joaquin County	\$ 19,120	California	\$ 25,109
Lodi	\$ 19,843							
San Joaquin County	\$ 19,120							
California	\$ 25,109							
<p style="text-align: center;"><u>INCOME STRATA</u> City of Lodi</p> <ul style="list-style-type: none"> o Very Low (no more than 50% County Median) = \$ 9,560 (or less) o Low (more than 50% but no more than 100% County median). = \$ 9,561 - \$19,120 o Moderate (no more than 120% of County median). = \$ 19,121 - \$22,944 								



EXHIBIT 16 FAMILY INCOME DATA • 1980

ESTIMATED PERCENTAGE OF HOUSEHOLDS
IN VARIOUS INCOME CATEGORIES (ADJUSTED
ON THE BASIS OF FAMILY SIZE & MEDIAN
INCOME - 1980)¹

	Very Low (-51% County Median)	Other Lower (51-100% County Median)	Moderate (101-120% County Median)	Above Moderate (+120% County Median)
STOCKTON CITY	29	17	21	33
LODI CITY	24	16	24	36
MANTECA CITY	20	20	25	35
TRACY CITY	23	20	21	36
RIPON CITY	27	20	26	27
ESCALON CITY	29	20	21	30
UNINCORPORATED	30	18	20	32
SAN JOAQUIN CO. TOTAL	27	18	23	32

1. SAN JOAQUIN COUNTY C.O.G. FAIR SHARE HOUSING NEED, 1982

POPULATION DATA SUMMARY

POPULATION SIZE

The population of Lodi has increased at an annual rate of approximately 2.9% for the past 20 years. The population in 1980 was 35,221 persons.

POPULATION TRENDS

The populations of elderly and individuals age 20 and older have increased, while the percent of the population of children under five has decreased. As of 1980 persons age 62 or older accounted for 19% of the total population.

RACIAL MIX

Currently the Caucasian population comprises 90% of the total population, with minorities making up only 10% of the total. Ten percent of the total population is of Spanish origin. (Spanish origin persons were itemized in the category - White, in the 1980 Census.

INCOME

The median family income in Lodi in 1980 was \$19,843. Twenty-one percent of Lodi's families were classified as very low income and 35% had low incomes. (Low income includes the "very low" group). Twelve percent of all Lodi families are headed by a female (single parent), of which 32% are below poverty level.

HOUSING CHARACTERISTICS

Lodi has had a growth of approximately 329 units per year since 1980 as illustrated in Exhibit 16. The census report for 1980 counted 14,811 housing units, an increase of 2,061 from 1975. Of the total number of households, 10,506 or 71% were single family units.

EXHIBIT 17 **HOUSING UNITS • 1950-1980**

CENSUS YEAR	TOTAL NO. HOUSING UNITS	NUMBER NEW UNITS SINCE PREVIOUS CENSUS	AVERAGE ANNUAL INCREASE	PERCENT INCREASE PER YEAR
1950	4,928	-	-	-
1960	7,896	2,968	297	+6%
1970	10,319	2,423	242	+3%
1980	14,811	4,492	449	+4.4%

SOURCE: U.S. Bureau of the Census

HOUSEHOLD SIZE

The average number of persons per household in Lodi has decreased from 2.78 persons per household in 1970 to 2.46 persons per household in 1980. According to the San Joaquin County Housing Element, the decrease in persons per households may be due to the following:

- 1) AN AGING POPULATION, which means longer occupancy requirements for the population
 - 2) SMALLER FAMILY SIZE, which means a reduction in the household size and therefore more housing units per population
 - 3) AN INCREASE IN THE DIVORCE RATE
 - 4) AN INCREASE IN ONE PARENT FAMILIES
 - 5) A LARGER PERCENTAGE OF THE POPULATION DELAYING MARRIAGE
- All of these factors will continue to have a profound effect of not only the quantity, but the type of housing needed to meet the demands for housing.

HOUSING TYPE AND TENURE

Of the 14,811 housing units counted by the Census in 1980, 10,506 (71%) were single family units, 3,921 (26%) were multiple family units, and 384 (2.6%) were mobilehomes. The percentage of multiple family dwellings has increased substantially since the 1960 census. According to the San Joaquin County Housing Element, "it is estimated that one out of every four units is a multiple family unit and that almost exactly 50% of all new units built over the eighteen years since 1960 were multi-family units."²

Owner occupancy of multi-family units has increased from 6.4% in 1960 to 15.7% in 1970 and 25.1% in 1979.²

The percentage of the total housing units which are occupied by renters has increased as well as shown in Exhibit 18 below. This is a noted trend throughout San Joaquin County which appears to be a result of two major factors--rising housing costs and reduced household size.

EXHIBIT 18 **OWNER RENTER OCCUPANCY • 1960-1980**

	1960	1970	1980
TOTAL HOUSING UNITS	7,896	10,313	14,807
OWNER OCCUPIED	5,249	6,587	8,329
PERCENT OF TOTAL	66%	64%	56%
RENTER OCCUPIED	2,301	3,372	5,686
PERCENT OF TOTAL	29%	33%	38%

Source: 1980 Census

GROUP QUARTERS

Group quarters include institutions, boarding houses, convalescent hospitals, retirement homes and guest homes where the quarters are shared by the owner or manager and five or more unrelated individuals who also share eating or cooking facilities.

Exhibit 19 shows the number of individuals residing in the Group Quarters in the City of Lodi, as counted by the Federal Census Bureau.

²San Joaquin County Housing Element, 1980, pg. 8.



EXHIBIT 19 GROUP QUARTERS RESIDENTS • 1960-1980

	1960	1970	1975	1980
TOTAL	366	581	648	744
% OF POPULATION	1.6%	2.0%	2.0%	2.1%

SOURCE: U.S. Census 1980

Each year the City of Lodi surveys the Group Quarter population and supplies the figures to the State for use in calculating the annual population estimates for fiscal subvention purposes. In 1980 there were 744 individuals (approximately 2.1% of the total City population) in group quarters. There are no major institutions, i.e. college dormitories, prisons, etc., in the City limits.

VACANCY RATES

The extent to which the housing market is meeting demand can be measured in part by the vacancy rates of all dwelling units. A healthy vacancy rate should fall within a range of 3-4%. The existence of a low vacancy rate would indicate a lack of available dwelling units and a need for market flexibility. A high vacancy rate would indicate that the housing market is expanding at a faster rate than the demand.

Lodi's vacancy rate has consistently remained among the lowest of San Joaquin County. The vacancy rate (all housing types) for the Lodi Planning area was 5.9% in 1960 compared to a County average of 7.5%. It decreased two full percentage points to 3.6% in 1970. The 1980 census figures indicate a 5.3% vacancy rate. However, a number of new multi-family units which were not yet available for occupancy were included in this count. The average County 1980 vacancy rate was 7.9%.

HOUSING CONDITION

A 1972 County sponsored field survey was conducted to determine the condition of housing in selected areas of the County. Results of this survey indicated that Lodi had 1750 dwelling units in need of rehabilitation and 600 units in need of replacement, representing 12.8% and 4.4% of the housing stock, respectively.



EXHIBIT 20 HOUSING TENURE & VACANCY • 1980

CENSUS TRACT	RENTER OCCUPIED		OWNER OCCUPIED		VACANCY RATE %		
	% of Total	No.	% of Total ¹	No.	1970	1975	1980
4201	25%	577	75%	1719	3.5%	2.8%	2.2%
4202	37%	1104	63%	1884	2.5%	4.2%	5.4%
4302	38%	836	62%	1389	2.4%	3.1%	3.2%
4303	11%	118	89%	974	2.4%	3.4%	3.6%
4304	54%	924	46%	795	N/A	N/A	9.1%
4400	57%	1198	43%	897	4.9%	4.5%	6.8%
4500	58%	929	42%	669	5.3%	4.5%	7.1%
TOTAL	38%	5686	56%	8329	3.6%	3.5%	5.3%²

SOURCE: 1970, 1980 U.S. Census of Population and Housing; 1975 Special Census, San Joaquin County Planning Department

¹ This figure represents the percentage of total occupied units.

² The increase in the 1980 Vacancy Rate is largely due to a number of new multi-family units which were constructed but were not available for rent at the time of Census.



EXHIBIT 21 OCCUPIED UNITS • 1980

No. Persons/Unit ³	No. Units	Percentage
1	3651	26%
2	4984	36%
3	2352	16.7%
4	1909	13.6%
5	709	5.0%
6	282	2.0%
7	85	0.6%
8 or more	43	0.3%
TOTAL OCCUPIED HOUSING UNITS	14015	100%

SOURCE: 1980 Census of Population and Housing

³ City median is 2.17 persons per unit.

The age of the housing stock is an indicator of its condition. The older the structure, the more likely it will be in need of rehabilitation or replacement. Nearly half of the 1980 stock was built prior to 1960 and 29% was built prior to 1950, as illustrated in Exhibit 22.

EXHIBIT 22 AGE OF HOUSING STOCK

	TOTAL	% OF TOTAL
1979 - MARCH 1980	702	4.7%
1975 - 1978	1778	12.0%
1970 - 1974	1911	12.9%
1960 - 1969	3109	21.0%
1950 - 1959	3041	20.5%
1940 - 1949	1696	11.4%
1939 OR EARLIER	2574	17.3%
TOTAL	14811	100.0%

Data pertaining to the absence of some or all plumbing and kitchen facilities is routinely collected with the census as an indication of housing condition. Exhibit 23 below, displays the number of housing units in Lodi by Census tract which lack some or all plumbing and kitchen facilities.

EXHIBIT 23 HOUSING UNITS LACKING COMPLETE PLUMBING FOR EXCLUSIVE USE • 1980

CENSUS TRACTS	42.01	42.02	43.02	43.03	43.04	44.00	45.00	TOTAL
TOTAL UNITS	2,350	3,159	2,299	1,133	1,893	2,253	1,722	14,809
LACKING COMPLETE PLUMBING	3	28	4	0	11	21	58	125
PERCENTAGE OF TOTAL	0.13%	0.89%	0.17%	0%	0.58%	0.93%	3.3%	0.84%

OVERCROWDING

Overcrowding rates reflect housing quality and measure affordability, availability and, to a certain extent, the condition of housing.

The percentage of overcrowded units (1.01 persons per room or more) in Lodi in 1980 was 3.33% compared to 5.1% for both 1960 and 1970. A total of 493 units were reported to be overcrowded compared to 512 in 1970 and 382 in 1960. Exhibits 24 and 25 reflect this data.

The highest percentage of overcrowding occurs in census tracts 44.00 and 45.00 (Exhibit 25). As household size continues to decline, it is expected that this problem will become less important in the future.

 **EXHIBIT 24
OVERCROWDED HOUSING UNITS • 1960 • 1970 • 1980**

YEAR	TOTAL HOUSEHOLDS	OVERCROWDED	SEVERELY OVERCROWDED
1960	7,550	382 (5.1%)	N/A
1970	9,959	512 (5.1%)	110 (1.1%)
1980	14,811	295 (2.0%)	198 (1.3%)

 **EXHIBIT 25
OVERCROWDING BY CENSUS TRACT 1980**

CENSUS TRACT	NO. OF UNITS W/1.01 PERSONS OR MORE PER ROOM	PERCENT OVERCROWDING PER CENSUS TRACT
42.01	52	2.3
42.02	60	2
43.02	41	1.8
43.03	10	0.91
43.04	74	4.3
44.00	161	7.7
45.00	95	5.9
TOTAL	493	3.33

Source: U.S. Dept. of Commerce, Bureau of the Census, 1980, Washington D.C.

MOBILITY

Length of occupancy of housing units by families is shown in Exhibit 26. This data, collected in 1970, typifies mobility patterns in Lodi. In 1970 18.1% of the population over 5 years of age lived outside of San Joaquin County in 1965. 53% of the population over 5 years old lived in the same residence as in 1965.

EXHIBIT 26 **LENGTH OF HOUSING UNIT OCCUPANCY** **1960-1970**

YEAR	TOTAL OCCUPIED UNITS	LENGTH OF OCCUPANCY		
		0-1.9 Yrs.	2-5.9 Yrs.	6 Yrs.+
1960	7,550	2849 (37.7%)	2109 (27.9%)	2592 (34.3%)
1970	9,959	3180 (31.9%)	1987 (20.0%)	4792 (48.1%)

SOURCE: U.S. Department of Commerce, Bureau of the Census, 1960, 1970, Washington D.C.

LAND AVAILABILITY-HOUSING SITES

Long term housing demand is basically a product of available, buildable land, residential growth trends and population growth. Using the following data concerning residential projects in process and undeveloped land within the City; in conjunction with past development trends and population projections, a reasonable estimate of the time frame for complete buildout of vacant residential lands can be determined.

As of January 1, 1981, there were approximately 442 net acres of undeveloped residential land within the City limits. Of that total, 180.6 acres were committed to development which had not commenced in January. 86.2 acres, or 24.4% was contained in 17 larger parcels scattered throughout the City. There were 59 individual lots or unbuilt portions of lots. The two largest undeveloped residential areas in the City (as of January 1, 1982) were Kennedy Ranch, with a net residential acreage of 73 acres, and Lobaugh Meadows with 76 net acres. Assuming January 1, 1981 General Plan densities, a maximum of 4,424 units can be accommodated on these acreages (see Exhibit 26). A complete listing of residential projects and subdivisions in process is included in the City of Lodi's publication Development Information, which is updated annually.



**EXHIBIT 27
SUMMARY OF UNDEVELOPED RESIDENTIAL
LAND • JANUARY 1981**

Unbuilt Units in Approved Developments:		Unbuilt Units:
Single-family units		1,125
Duplexes	(includes zero-lot line single family)	152
Multiple-family units		886
TOTAL		2,163

Maximum Potential Units on "Vacant" Residential Parcels:		Unbuilt Units:
Lobaugh Meadows		760 units maximum
Kennedy Ranch		575 units maximum
Noma Property		160 units maximum
Eilers Property		280 units maximum
Larger Vacant Parcels		
Zones R-1 (5 du/ac)	9 parcels with 17.12 gr. ac	86 units, maximum
Zoned R-2 (10 du/ac)	4 parcels with 18.50 gr. ac.	185 units, maximum
Zoned RMD (40 du/ac)	3 parcels with 0.70 gr. ac.	28 units, maximum
Zoned R-HD (80 du/ac)	1 parcel with 0.41 gr. ac.	32 units, maximum ²
TOTAL Units Maximum, including small parcels		<u>4,424</u> units, maximum

NOTE: 20% is the average figure subtracted for streets in determining net acres. Zoning density is based on net acres; however, larger vacant parcels and therefore maximum units are calculated with gross acres.

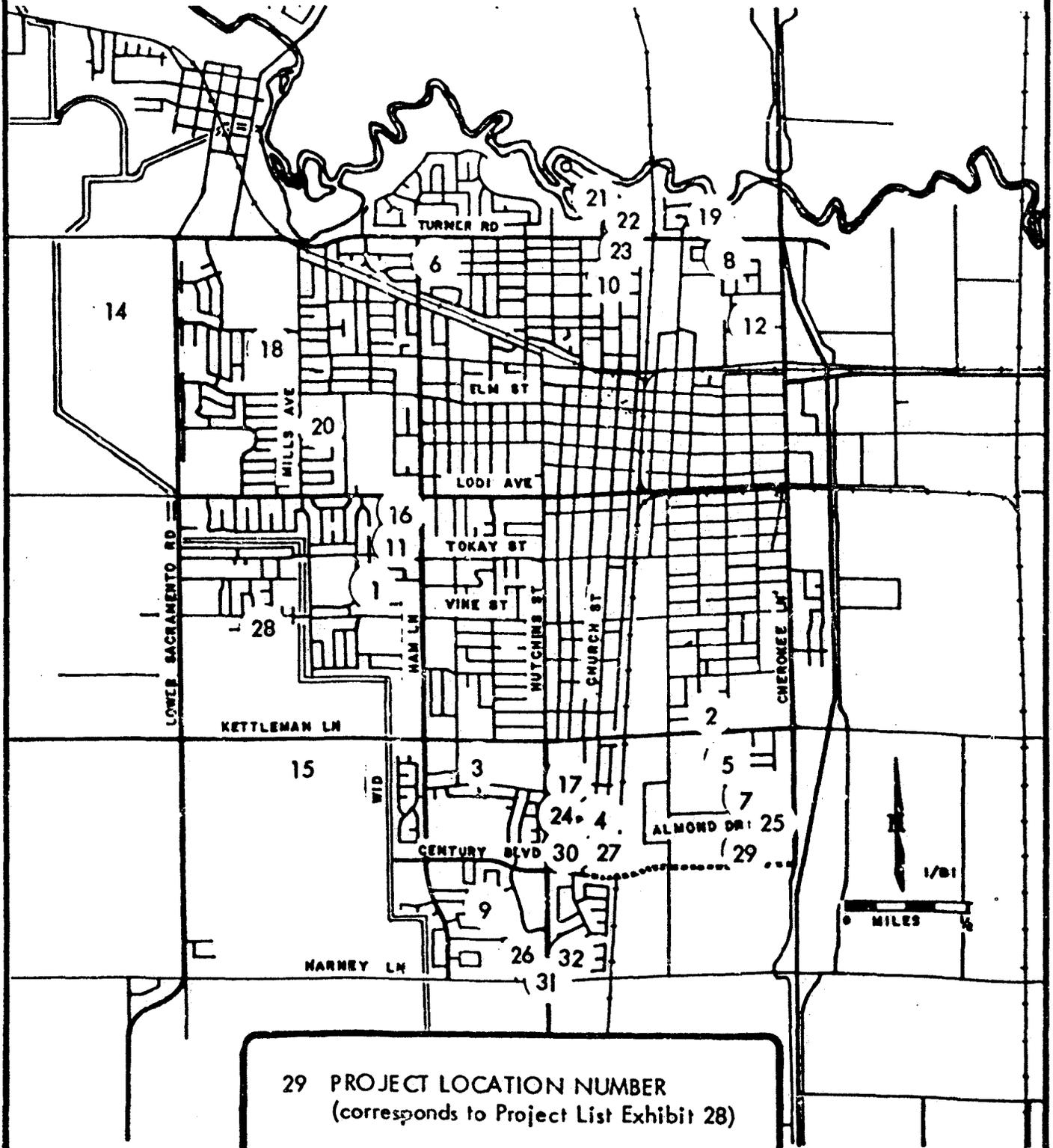
Single-family units can be built on duplex lots in approved subdivisions.

Commercially zoned parcels (excluding those in PD zones) can be used for residential units at R-HD density.

Development of the larger and smaller vacant parcels to maximum density will be nearly impossible due to the design limitations as a result of parcel configuration. Most development is done at substantially lower densities than maximum planned.



EXHIBIT 28 RESIDENTIAL PROJECTS IN PROCESS JANUARY 1982



29 PROJECT LOCATION NUMBER
(corresponds to Project List Exhibit 28)

EXHIBIT 29
 **RESIDENTIAL PROJECTS & SUBDIVISIONS**
CITY OF LODI

Current to May 1982

RESIDENTIAL SUBDIVISION OR PROJECT	MAP NO.	TOTAL RESIDENTIAL ACRES	NUMBER SINGLE-FAMILY UNITS			NUMBER DUPLEX/G-LOTLINE UNITS			NUMBER MULTIPLE UNITS			COMMENTS
			Proposed or Approved	Completed or Have Permit	Unbuilt	Proposed or Approved	Completed or Have Permit	Unbuilt	Proposed or Approved	Completed or Have Permit	Unbuilt	
AARON TERRACE	1	3.4	14	2	12	-	-	-	-	-	-	
ALDON PLACE	2	3	-	-	-	-	-	-	8	-	8	Condominiums
BECKMAN ESTATES	3	5.4	-	-	-	-	-	-	39	39	0	Planned Unit Development
BECKMAN RANCH												
Unit #1		17.4	63	63	0	22	22	0	26	26	0	
Unit #2		19.6	69	69	0	32	32	0	-	-	-	
Unit #3		22.8	95	24	71	26	26	0	-	-	-	
Unit #4		18.6	47	2	45	30	12	18	-	-	-	
Unit #5		20.0	44	0	44	18	0	18	68	-	68	
BRIERWOOD	4								16	16	-	Condominiums
BURGUNDY VILLAGE	5	5.0±	32	0	32	-	-	-	-	-	-	Tentative Map Only
BURLINGTON MANOR	6	5.5	27	9	18	-	-	-	-	-	-	
CAMBRIDGE PLACE	7	8.5	-	-	-	-	-	-	151	151	0	Condominiums
COLONY RANCH	8	25.2	104	6	98	34	0	34	-	-	-	
ENGLISH OAKS MANOR	9											
Unit #6		10.0	40	31	9	-	-	-	-	-	-	
Unit #7		12.0	47	38	9	-	-	-	-	-	-	
HIDEAWAY	10	.5	-	-	-	-	-	-	6	-	6	Condominiums
HOMESTEAD MANOR	11											
Unit #1		12.9	52	49	3	-	-	-	-	-	-	
Unit #2		9.7	44	41	3	-	-	-	-	-	-	
Unit #3		10.7	29	12	17	44	20	24	-	-	-	
HOMESTEAD OAKS	12	.8	-	-	-	-	-	-	20	-	20	Condominiums

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RESIDENTIAL SUBDIVISION OR PROJECT	MAP NO.	TOTAL RESIDENTIAL ACRES	NUMBER SINGLE- FAMILY UNITS			NUMBER DUPLEX/ 0-LOTLINE UNITS			NUMBER MULTIPLE UNITS			Current to 5/82
			Proposed or Approved	Completed or Have Permit	Unbuilt	Proposed or Approved	Completed or Have Permit	Unbuilt	Proposed or Approved	Completed or Have Permit	Unbuilt	COMMENTS
KENNEDY RANCH	14	88.0	286	-	286	-	-	-	337	-	337	Tentative Map Only. Total Development: (136 SF Units (346 Multi Fam/Condo Units (18 Ac Com/Prof (20 Ac Lake Condominiums
LAKESHORE VILLAGE	15	50.4	(Total Residential Acreage)									
Unit #1		28.0	33	10	23	-	-	-	237	56	181	
LAS CASITAS	16	10.0	-	-	-	-	-	-	92	0	92	28 Units are Condominiums
MATTHEWS ESTATES (Diablo Meadows)	17	11.4	49	40	9	22	22	0	3	3	0	
MILLSWOOD	18											
Unit #1		11.2	53	40	13	8	6	2	-	-	-	
Unit #2		3.0	16	10	6	0	0	0	-	-	-	
MOKELUMNE VILLAGE	19	33.1	90	6	84	20	0	20	28	28	0	
PINEWOOD	20	2.1	13	-	13	-	-	-	-	-	-	
RIVERGATE-MOKELUMNE	21	29.3	50	28	22	-	-	-	-	-	-	
RIVERGATE	22	17.0 [±]	-	-	-	-	-	-	70	-	-	Planned Unit Development Tentative Map Only. No Specific approval. Proposed Condominiums
Unit #1		-	-	-	-	-	-	-	13	0	13	
SANGUINETTI PARK	23	4.5	-	-	-	-	-	-	90	-	90	
STONEBROOK	24	1.2	-	-	-	-	-	-	30	-	30	Tentative Map Approved Only. Proposed Condominiums
STONETREE	25	5.7	-	-	-	-	-	-	90	-	90	
SULLIVAN OAKS	26	.8	-	-	-	-	-	-	16	-	16	Tentative Map Approval Only. Portion of original Winchester Acres Condominium Project
SUMMERFIELD (former Lodi South)	27	8.1	13	-	13	4	-	4	66	-	66	Tentative Map Approved Only.

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RESIDENTIAL SUBDIVISION OR PROJECT	MAP NO.	TOTAL RESIDENTIAL ACRES	NUMBER SINGLE- FAMILY UNITS			NUMBER DUPLEX/ O-LOTLINE UNITS			NUMBER MULTIPLE UNITS			Current to 5/82
			Proposed or Approved	Completed or Have Permit	Unbuilt	Proposed or Approved	Completed or Have Permit	Unbuilt	Proposed or Approved	Completed or Have Permit	Unbuilt	COMMENTS
SUNWEST UNIT #3	28	14.4	54	26	28	-	-	-	-	-	-	Development Plan Approved Tentative Map Only.
TANDY RANCH Unit #1	29	41.5	176	0	176	24	0	24	61	0	61	
WESTWIND	30	4.9	22	20	2	-	-	-	-	-	-	Remainder of Residential portion of Winchester Acres Phased Apartment/Condo project.
WINCHESTER OAKS	31	6.1	-	-	-	-	-	-	122	122	-	
WOODBROOK	32	5.0	-	-	-	-	-	-	70	0	70	Proposed Condominium project. Tentative Map approved only.

HOUSING CHARACTERISTICS SUMMARY

- o Average household size has decreased from 2.78 persons per household in 1970 to 2.46 persons per household in 1980.

- o 71% of all Lodi housing units are single family units.

- o 56% of all Lodi housing units are owner-occupied (a decrease from 66% in 1960).

- o The 1980 Lodi vacancy rate was 5.3%.

- o Nearly 50 percent of the Lodi housing units are over 30 years old.

- o As of January 1, 1981, there were approximately 442 net acres of undeveloped residential land within the City limits.

SECTION II

HOUSING NEEDS

The housing needs of all economic segments of the community must be assessed prior to the development of programs which will be effective in alleviating housing problems.

A number of local housing needs can be identified based upon the composition of the population and characteristics of the existing housing stock. Demand for new units is generated each year due to increases in the population in addition to the need to replace existing substandard housing. The needs of the elderly, low and moderate income households, the handicapped, large families, minorities and migrant farm workers must also be considered.

In this section, housing needs will be discussed in three parts:

1. Immediate Housing Need - Analysis of housing affordability, replacement need of substandard housing, and housing needs of special groups, and;
2. Projected Need for Market Rate Housing - over a 5 year period ending in 1985.
3. The Fair Share Housing Needs developed by the San Joaquin Council of Governments.

IMMEDIATE HOUSING NEED

The assessment of housing needs requires an analysis of both the existing housing stock and households. The immediate need is based upon the suitability of the existing housing stock for the present population.

EXHIBIT 30 **HOUSING STOCK UPDATE • 1970-1980**

	Single Family	Mobilehomes	Multiple-Family ¹	Total
1970 Total	8,137	210	1,986	10,333
% of Total Units	79%	2%	19%	100%
1980 Total	10,506	384	3,912	14,811
% of Total Units	71%	2.6%	26.5%	100%
% Increase from 1970-1980	39%	89%	27%	38%

1. Includes duplexes

SOURCE: 1981 Building Department Annual Report

Affordable Housing

"Affordable Housing" is defined by the Department of Housing and Urban Development (HUD) as that housing which families earning less than 80% of the County median income can afford. The median family income in San Joaquin County in 1980 was \$19,120. (The Lodi median was slightly higher at \$19,843).

In 1980, Lodi families with an annual income less than \$15,296 (approximately 3,489 families, or 35% of all Lodi families), needed affordable housing units.

Homeownership Costs - Nationwide, the average family spends approximately 25% of its monthly income for housing. In California, however, the average homebuyer commits an average of 37% of his or her family monthly income on housing costs.

A Lodi family with an annual income of \$15,296 (35% of the population as noted above) spending an average of 37% on housing, could pay no more than \$471 per month on housing.

Median housing prices increased approximately 210% from 1970 to 1980. Added to the increased purchase price of homes, record high interest rates have had a major impact on affordable rent.

Rental Costs - The 1980 median contract rent was \$185 per month which represents a 120% increase from the \$84 median in 1970. Persons renting a housing unit with a rent payment of \$185 per month must earn a minimum of \$740 per month (\$8,880 per year) to avoid paying an excessive portion of their income (over 25%) for housing.





EXHIBIT 31 PROJECTED NEED FOR MARKET RATE HOUSING 1980-1985

	BASIC NEW CONSTRUCTION	HOUSING REPLACEMENT NEED	TOTAL NEED
STOCKTON ¹	7910	1740	9650
A	6840	50	6890
B	770	350	1120
C	50	220	270
D ₁	220	360	580
D ₂	30	760	790
DELTA	10	20	30
THORNTON	130	30	160
LODI	1990	360	2350
LOCKEFORD	230	50	280
LINDEN	110	20	130
ESCALON	280	50	330
RIPON	220	60	280
MANTECA	1370	170	2040
TRACY	1040	220	1260
UNINC.	5250	1210	6460
COUNTY	13770	2720	16490

¹Areas A, B, C, D¹ D² are subsections of the City of Stockton

Source: San Joaquin County Housing Element, pg. 34.

REPLACEMENT NEED - Substandard Housing¹

Substandard housing units are those which are in need of rehabilitation or replacement and may be due to one of the following conditions:

Overcrowding

Replacement housing is needed for 493 families itemized in the 1980 Census as currently living in overcrowded conditions in Lodi; i.e. families living in houses with 1.01 persons or more per room. The overcrowded units in Lodi constitute 6.2% of the total number of overcrowded units in San Joaquin County.

Structures Lacking Adequate Plumbing

125 year-round housing units were designated in 1980 as having inadequate plumbing for exclusive use.

- o 62 (50% of such households were occupied by a White householder.
- o 24 (19%) were occupied by an Asian householder.
- o 22 (17.6%) were occupied by a Spanish origin householder.
- o 21 (16.8%) were occupied by an American Indian, Eskimo or Aleut householder.

The significance of this data is as follows:

- o White households with 90% of the population have only 50% of households with inadequate plumbing.
- o Asian households comprise only 3.3% of the total population but have 19% of the households with inadequate plumbing.
- o American Indian, Eskimo and Aleut household comprise a mere .78% of the total population but have 16.8% of the households with inadequate plumbing.
- o Spanish origin households comprise 10% of the population but have 17.6% of the households with inadequate plumbing.

The following ratios depict number of households with inadequate plumbing as they are broken down by ethnic group:

White	1 of every 513 households
Spanish	1 of every 160 households
Asians	1 of every 48 households
American Indian	1 of every 13 households

¹See Appendix for definition of Substandard Housing by U.S. Department of Housing and Urban Development (HUD).

HOUSING NEEDS OF SPECIAL GROUPS

Many special housing needs are apparent in Lodi. They include the needs of the handicapped, the elderly, minorities, migrant farm workers, or of large families. Finding adequate housing in Lodi is particularly difficult for these groups.

Elderly and Handicapped - The San Joaquin Housing Element estimates that there are 640 elderly or handicapped persons in need of housing assistance in Lodi.

Large Families - Large families are those having 5 or more members. Housing assistance is needed for 470 large families.

Minorities - The San Joaquin County Planning Department has calculated that approximately 700 minority families are in need of housing assistance in Lodi. The opportunity for equal housing assistance throughout the entire County was achieved by distributing all minority housing needs to each city in the County based on their overall population.

Migrant Housing - Migrant housing is in greatest demand during the grape harvest season, generally August through October each year. Housing needs are supplied locally by older group quarters such as hotels and vacated spaces above commercial businesses. In several cases, health conditions are found to be unacceptable as these quarters frequently lack adequate heat, light, ventilation and plumbing facilities. Approximately 300 migrant persons occupy older downtown hotels although this number has decreased over the past five years. Some of the older structures have been closed or condemned, resulting in higher occupancies for the remaining locations.

The actual populations of these establishments at any given time may be unknown, except as reported by the Lodi Police, Fire and Building Departments during occasional inspections. In at least one specific case, migrant laborers were known to have re-occupied an unsafe and condemned structure. In these cases and others where a building's occupancy is unknown, safety of the tenants may be jeopardized in an emergency situation requiring evacuation.

PROJECTED HOUSING NEED

As the Lodi population increases and the amount of available housing stock decreases, a demand for new construction will result. As shown in Exhibit 40, an average of 429 new units will be needed each year to accommodate the projected increases in population as well as the replacement of substandard housing.

FAIR SHARE HOUSING NEED

It is recognized that the local housing market area extends beyond the Lodi city limits. The Fair Share Housing Allocation Plan is a response to the housing needs of a fair share of those households who do not presently live within the City but whose housing opportunities are nevertheless affected by the planning decisions of the City.

San Joaquin County Council of Governments (C.O.G.) has the responsibility of developing Fair Share Housing Allocations for each jurisdiction in the County. The estimated Fair Share need for Lodi is 429 new housing units per year. This number is approximately 11% of the total County need. These units are projected to be adequate to accommodate increases in population as well as to replace dilapidated units. Construction data for 1976-1981 (Exhibit 46) depicts an average annual construction of 383 units. Although this data appears to be below the minimum required to meet Lodi's Fair Share House need, the figures are distorted due to a drastic reduction in construction activity during 1980 and 1981. If construction activity increases to previous levels, it is anticipated that Lodi would have no problem meeting the need.

Methodology Developing the Fair Share Housing Allocation figures involved calculating housing need figures for each of the income categories in Exhibit 33 for each jurisdiction in the County. The projected figures are based on population projections prepared by local and County governments. Local trends are analyzed and the need to replace the need to replace deteriorated and 33 housing is projected. Projections in Exhibit 32 were prepared by the California Department of Housing and Community Development (HCD) and were based on an analysis of Statewide trends. The local projections (Exhibit 34) are considered inherently more accurate than those developed by HCD, but close enough to be compatible with Statewide projections.

The projected need for additional housing units (Exhibit 40) was calculated by adding the projected number of new households for each year to the projected annual replacement need.

Exhibit 39 shows the estimated annual replacement need for the City of Lodi as compared with other jurisdictions in the County. These figures are based on the 1960-1970 rates of loss of housing units in various age categories in housing surveys carried out in recent years. (SOURCE: San Joaquin County C.O.G.)

Exhibit 45 is data calculated by C.O.G. designating 4 separate income categories and the number of new units necessary to meet the needs of each category. These figures are derived from 1970 Census data and have been adjusted to allow for differences in household size and median income.

It was estimated that 90% of the Housing Replacement need would be for units occupied by households in the Very Low income category. The remaining 10% would be for units occupied by households in the Other Lower Income category. Housing replacement need for units occupied by Moderate and Above Moderate income households was considered negligible. Estimated Annual Replacement Need is shown in Exhibit 39.

EXHIBIT 32
 **SAN JOAQUIN COUNTY POPULATION & HOUSING PROJECTIONS 1980-1986 HCD**

1980 Census April 1		July 1 Projections						
	1980	1981	1982	1983	1984	1985	1986	
Population	347,342	349,600	357,600	365,600	373,500	381,500	389,500	397,000
Households	136,001	125,400	129,000	132,500	136,100	139,700	143,400	146,600

EXHIBIT 33
 **SAN JOAQUIN COUNTY INCOME ESTIMATES 1980 HCD**

<u>CATEGORY</u>	<u>PERCENTAGE OF HOUSEHOLDS</u>
Very Low (No more than 50% of 1970 County Median	27
Other Lower (More than 50% but no more than 100% of 1970 County Median Income	18
Moderate (More than 100% but no more than 120% of 1970 County Median Income.)	23
Above Moderate (More than 120% of 1970 County Median Income.)	32

(Based on 1980 definitions, and adjusted for family size).

EXHIBIT 34
 **POPULATION PROJECTIONS BY JURISDICTION**
1980-1986

	1980 Census		July 1 Projections					
	April 1	1980	1981	1982	1983	1984	1985	1986
Stockton	149,779	150,849	155,128	159,800	164,500	169,500	174,600	179,800
Lodi	35,221	35,290	36,247	37,047	37,837	38,637	39,437	40,187
Manteca	24,925	25,484	26,731	27,947	29,148	30,364	31,580	32,811
Tracy	18,428	18,449	19,212	19,996	20,780	21,564	22,350	23,134
Ripon	3,509	3,522	3,643	3,714	3,785	3,856	3,925	3,998
Escalon	3,127	3,158	3,283	3,439	3,595	3,751	3,908	4,063
Unincorporated	112,353	112,212	111,651	111,093	110,537	109,984	109,434	108,887
San Joaquin Co. Total	347,342	348,964	355,895	363,036	370,182	377,656	385,234	392,880

SOURCE. C.O.G., 1982

EXHIBIT 35
 **NUMBER OF HOUSEHOLDS BY JURISDICTION**
1980-1986

	July 1, Projections						
	1980	1981	1982	1983	1984	1985	1986
Stockton	146,175	150,454	155,126	159,826	164,826	169,926	175,126
Lodi	35,079	36,036	36,836	37,626	38,426	39,226	39,976
Manteca	25,237	26,484	27,700	28,901	30,117	31,333	32,514
Tracy	18,374	19,137	19,921	20,705	21,489	22,275	23,059
Ripon	3,437	3,558	3,629	3,700	3,771	3,823	3,913
Escalon	3,158	3,283	3,439	3,595	3,751	3,908	4,063
Unincorporated	108,140	107,579	107,021	106,465	105,912	105,362	104,815
San Joaquin Co. Total	339,600	346,531	353,672	360,818	368,292	375,853	383,516

1. Household population is smaller than total population because some residents live in group quarters rather than in households.

SOURCE: San Joaquin County Council of Governments

EXHIBIT 36
 **AVERAGE HOUSEHOLD POPULATION BY JURISDICTION • 1980-1986**

	1980	1981	1982	1983	1984	1985	1986
Stockton	2.71	2.70	2.69	2.68	2.67	2.66	2.65
Lodi	2.40	2.39	2.38	2.37	2.36	2.35	2.34
Manteca	2.77	2.74	2.71	2.69	2.67	2.65	2.63
Tracy	2.66	2.65	2.64	2.63	2.62	2.61	2.60
Ripon	2.85	2.84	2.83	2.82	2.81	2.80	2.79
Escalon	2.71	2.70	2.69	2.68	2.67	2.66	2.65
Unincorporated	2.93	2.92	2.91	2.90	2.89	2.88	2.87
San Joaquin CO	2.74	2.73	2.72	2.70	2.69	2.68	2.67

EXHIBIT 37
 **NUMBER OF HOUSEHOLDS BY JURISDICTION 1980-1986**

	1980	1981	1982	1983	1984	1985	1986
Stockton	53,939	55,724	57,667	59,637	61,733	63,882	66,085
Lodi	14,811	15,078	15,477	15,876	16,282	16,692	17,084
Manteca	9,124	9,672	10,214	10,756	11,300	11,842	12,389
Tracy	6,898	7,222	7,546	7,872	8,101	8,534	8,869
Ripon	1,206	1,253	1,282	1,312	1,342	1,365	1,403
Escalon	1,165	1,216	1,278	1,341	1,405	1,469	1,533
Unincorporated	36,908	36,842	36,777	36,712	36,647	36,584	36,521
San Joaquin Co	123,856	127,007	130,241	133,507	136,911	140,368	143,884

EXHIBIT 38
 **PROJECTED NEED FOR ADDITIONAL HOUSING UNITS BY JURISDICTION 1980-1986**

	1980-81	1981-82	1982-83	1983-84	1984-85	1985-86
Stockton	1,700	1,863	1,880	2,011	2,059	2,118
Lodi	443	387	387	393	398	384
Manteca	548	542	542	544	542	547
Tracy	324	324	327	329	332	335
Ripon	38	21	25	20	18	33
Escalon	44	48	53	54	56	54
Unincorporated	50	49	50	50	52	45
San Joaquin Co	3,147	3,234	3,264	3,401	3,457	3,516

SOURCE: San Joaquin County Council of Governments



**EXHIBIT 39
PROJECTED ANNUAL HOUSING REPLACEMENT
NEED BY JURISDICTION 1980-1986**

JURISDICTION	No. Units
Stockton	155
Lodi	30
Manteca	14
Tracy	18
Ripon	4
Escalon	4
Unincorporated	182
San Joaquin County	407
Total	



**EXHIBIT 40
PROJECTED NEED FOR ADDITIONAL HOUSING
UNITS BY JURISDICTION • 1980-1986**

July 1 - June 30 Projections

	1980-81	1981-82	1982-83	1983-84	1984-85	1985-86
Stockton	1,855	2,018	2,035	2,166	2,214	2,273
Lodi	473	417	417	423	428	414
Manteca	562	556	556	558	556	561
Tracy	342	342	345	347	350	353
Ripon	42	25	29	24	22	37
Escalon	48	52	57	58	60	58
Unincorporated	232	231	232	232	234	227
San Joaquin Co.	3,554	3,641	3,671	3,808	3,864	3,923

SOURCE: San Joaquin County Council of Governments



EXHIBIT 41 HOUSEHOLD INCOME GROUP DATA • 1980

	Very Low	Other Lower	Moderate	Above Moderate
Stockton	22	31	14	33
Lodi	17	29	18	36
Manteca	12	36	17	35
Tracy	15	35	14	36
Ripon	19	36	18	27
Escalon	21	35	14	30
Unincorporated	22	33	13	32
San Joaquin Co.	20	32	15	33

Source: 1970 Census of Population: General Social and Economic Characteristics



EXHIBIT 42 ESTIMATED HOUSEHOLD INCOME DATA • 1980

	Very Low (1-51% County Median)	Other Lower (51-100% County Median)	Moderate (101-120% County Median)	Above (+120% County Median)
Stockton	29	17	21	33
Lodi	24	16	24	36
Manteca	20	20	25	35
Tracy	23	20	21	36
Ripon	27	20	26	27
Escalon	29	20	21	30
Unincorporated	30	18	20	32
San Joaquin Co. Total	27	18	23	32

SOURCE: San Joaquin County of Governments

EXHIBIT 43
 **PROJECTED ANNUAL HOUSING REPLACEMENT NEED BY JURISDICTION • 1980-1986**

	Very Low	Other Lower
	Stockton	140
Lodi	27	3
Manteca	13	1
Tracy	16	2
Ripon	3	1
Escalon	3	1
Unincorporated	164	18
San Joaquin County		
Total	366	41

EXHIBIT 44 CITY OF STOCKTON
 **ANNUAL HOUSING REPLACEMENT NEED BY INCOME GROUP 1980**

	1980- 1981	1981- 1982	1982- 1983	1983- 1984	1984- 1985	1985- 1986
Very Low	633	680	685	723	737	754
Other Lower	304	332	335	357	365	375
Moderate	357	391	395	422	432	445
Above						
Moderate	561	615	620	664	679	699
Total	1,855	2,018	2,035	2,166	2,213	2,273

EXHIBIT 45 CITY OF LODI
 **ANNUAL HOUSING REPLACEMENT NEED BY INCOME GROUP 1980**

	1980- 1981	1981- 1982	1982- 1983	1983- 1984	1984- 1985	1985- 1986
Very Low	133	120	120	121	123	119
Other Lower	74	65	65	66	67	64
Moderate	106	93	93	94	96	92
Above						
Moderate	159	139	139	141	143	138
Total	472	417	417	422	429	413

SOURCE: San Joaquin County Council of Governments



EXHIBIT 46 CITY OF LODI BUILDING PERMIT DATA

YEAR	NEW SINGLE-FAMILY DWELLING UNITS	VALUE	NEW DUPLEX DWELLING UNITS	VALUE	NEW APARTMENT UNITS	VALUE	DEMOLISHED OR MOVED OUT	UNITS ADDED BY REMODEL	NET GAIN
1981	139	\$ 8,914,238		\$ 299,800	106	\$3,308,300	-11	--	242
1980	94	6,384,610	8	267,540	147	4,426,880	-13	4	240
1979	213	12,228,248	58	2,191,000	128	2,464,200	-23	3	379
1978	255	13,287,679	72	2,217,979	218	3,830,236	-31	6	520
1977	302	12,050,078	66	1,737,758	290	4,574,520	-20	1	639
1976	176	6,698,317	38	886,100	85	1,301,312	-20	--	279

-41-

SOURCE: City of Lodi Building Inspection Division Annual Report, 1981



EXHIBIT 47 LOW INCOME HOUSEHOLDS REQUIRING ASSISTANCE • 1979

	Total	Elderly or Handicapped	Family (4 or less persons)	Family (5 or more persons)
Owner Households	904	199	551	154
Renter Households	962	212	643	107
Total Housing Needing Assistance	1,866	411	1,194	261
Percent of Total	100%	22.0%	64.0%	14.0%

SOURCE: San Joaquin County Council of Governments, 1979.

CONSTRAINTS IN MEETING HOUSING NEED

MARKET CONSTRAINTS - Housing costs are affected by many different factors including the cost of construction (materials and labor), the cost of land and the cost of capital.

A. Direct Costs

Costs of Construction

Construction costs have increased rapidly due to inflation. The size of a housing unit, its proximity to the source of the building materials, and the quality of construction materials can significantly affect construction costs.

Residential construction costs in various parts of the country are estimated each year by Building Standards magazine. The May-June 1982 estimate for the construction of a tract house for areas similar to San Joaquin County was \$34.79 per square foot, while custom homes averaged \$45.96 per square foot.

Thus, construction of a 1,500 square foot single-family tract house in 1982 would be approximately \$52,185. These costs are based upon compliance with the Uniform Building Code and a 10% profit for the builder. The costs do not include the cost of land or the cost of a private garage

The average building permit value for single-family dwellings for permits issued between January 1, 1982 and July 31, 1982 in Lodi was \$60,389. (This amount includes a private garage but does not include

Redevelopment

The cost of redevelopment and renovation is difficult to estimate; however, the average cost for recently completed rehabilitation projects in Stockton was \$25.00 per square foot.

Public Improvements

Equally difficult to estimate are the costs of required public improvements such as curbs, gutters, sidewalks, fire hydrants, storm drain facilities, etc. Each project differs by size, location and price; therefore, public improvement costs vary greatly. The City of Lodi has an "Offsite Improvement Ordinance", which requires the improvement of off-site facilities as necessary to maintain adequate services throughout the community. These requirements are imposed on projects with building permit valuations which exceed \$11,500.00. Public improvements add significant costs to improving or redeveloping a residential area. As inflation continues to affect the price of land and construction, the City's ability to improve its existing housing stock and to provide additional needed housing may be negatively affected.

Costs of Land

The location, accessibility, scarcity and availability of public services are major factors in determining the value of land. However, according to the San Joaquin County Council of Governments, factors other than land costs are primarily responsible for the increasing cost of construction. The cost and availability of public services, the cost of construction and the cost of money were determined to be far more important in determining whether housing would be built in a certain location in the County.

Cost of Materials

Cost of materials are the single most important factor responsible for the increase in housing costs in San Joaquin County. Lumber, due to its importance in residential construction has a large impact on the cost of housing. Of the building materials, the price of lumber has increased the most.

Due to a decrease in housing starts in the past few years, building material prices have somewhat stabilized. It is impossible to predict the amount of price increase to expect in the future. It is safe to assume that the cost of materials will continue to be a significant percentage of the cost of construction in the future.

Cost of Labor

According to several area bankers, realtors, developers and public officials, the cost of labor is the second most significant factor in

increasing the cost of construction in the County. Strong union control, shop control and proximity to the Bay Area are major contributors to the higher prices; Highly organized labor in Northern San Joaquin County requires greater levels of benefits to employees, resulting in greater prices. Shop control in plumbing and electrical trades means that all work must be subcontracted, increasing prices for these services typically by 10%.

Demand for construction in the Bay Area results in the need for comparable prices in San Joaquin County; therefore, as competition for labor between the two areas increases, prices are driven up.

B. Indirect Costs

Cost of Capital

The cost of Capital affects housing prices in two ways.

- 1) Development Capital - usually lent on a short term, high interest rate. This results in increases in construction costs which are ultimately reflected in the sales price for a property.
- 2) Mortgage Rates - (long term loan interest rates) affect the purchasing power of potential buyers.

The effects of capital costs are evident in increasing housing prices. The cost of financing development adds directly to the sales price of a unit. When a mortgage is obtained on that unit, the monthly payment will also be significantly affected. Financing costs have contributed to an increase in the monthly payment required for the average house in Lodi.

In 1978 the average monthly payment was \$357.00. In 1981 the payments on an identical house had increased 148% to \$885.00. An annual net income of \$17,174.40 was required to afford an average house in Lodi in 1978. In 1981, a gross income of \$35,424 annually was required to afford the same house. As a result, many potential homebuyers have been forced out of the housing market.





**EXHIBIT 48
TYPICAL 3 BEDROOM UNIT COST SUMMARY
IN SAN JOAQUIN COUNTY 1981**

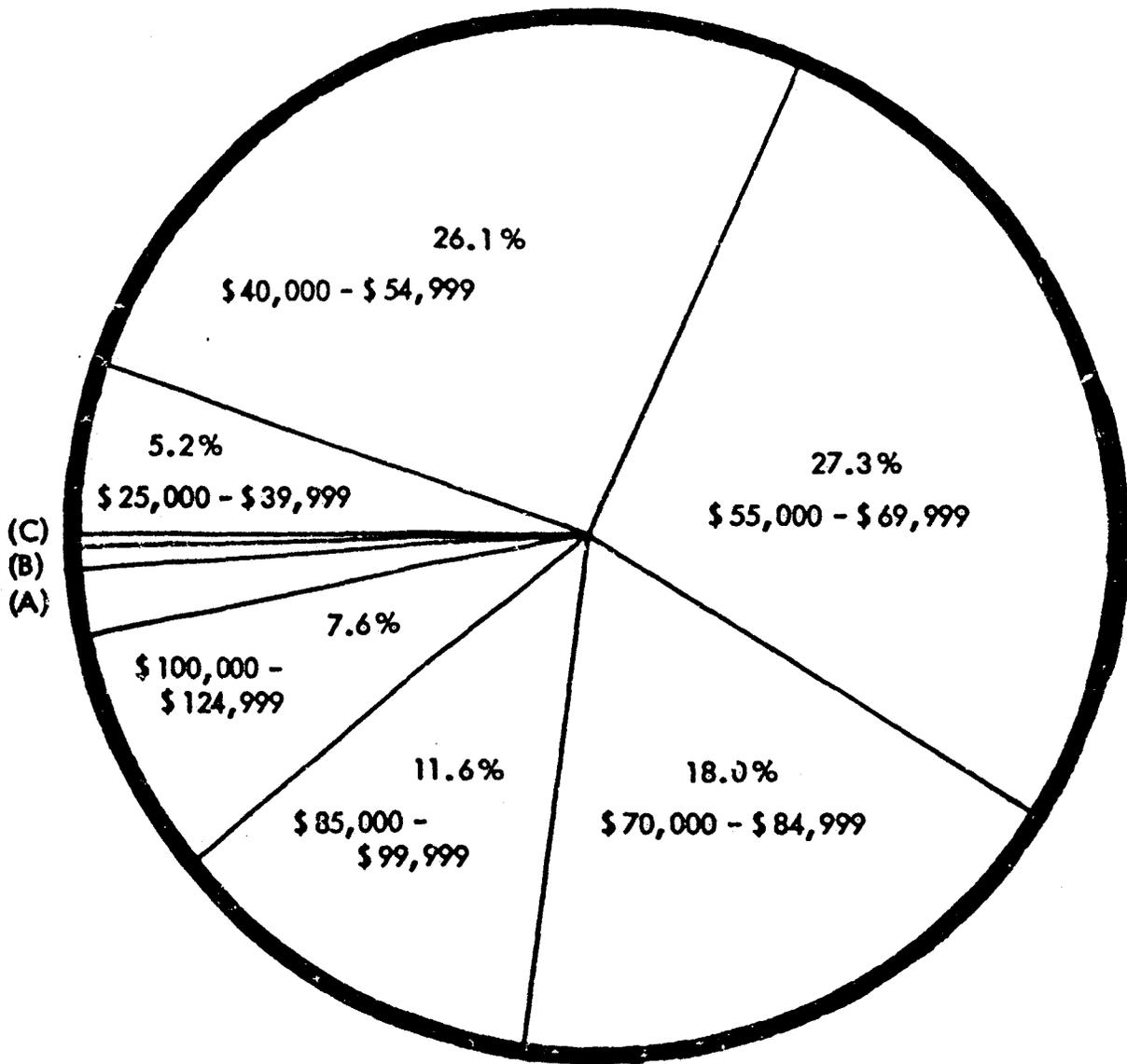
		% OF TOTAL COST
Land Cost	\$ 6,000	9.3%
Site Development	\$ 6,000	9.3%
Construction	\$36,000	55.8%
Marketing	\$ 1,200	1.9%
Financing	\$ 4,500	7.0%
Sub-Total	\$53,700	83.3%
Actual Sales Price	\$64,000	100.0%

*A 1200 square foot house on a 6,000 square foot lot with urban services (i.e. curbs, gutters, sidewalks water, sewer and lighting) and with no government subsidy)

Source: San Joaquin County COG General Plan Housing Element, p.22.

EXHIBIT 49
CITY OF LODI 1980-1981
RESIDENTIAL SALES DATA

PERCENTAGE OF ALL SOLD RESIDENTIAL PROPERTIES BY PRICE RANGE IN THE CITY OF LODI (March 1980 - February 1981).



- (A) \$ 125,000 - \$ 149,999 = 2.0 %
- (B) \$ 150,000 - \$ 199,999 = 0.6 %
- (C) \$ 200,000 - \$ 249,999 = 0.4 %

Source: Lodi Board of Realtors, 1981.

The City's drainage system is perhaps the most critical utility in terms of urban expansion and development. Due to the City's topography, limitations of the Woodbridge Irrigation District on drainage into their facilities and the input of citizens and area farmers, the City Council adopted a retention basin plan in 1963. The first three basins and the trunk lines were financed by bond issue. New facilities are now financed through a Master Drainage Fee which is paid by the developer at the time a parcel is developed. The fee is based on gross acreage and is adjusted every six months for inflation. All fees go into a drainage fund which is used, at the discretion of the City Council, to construct basins and/or trunk lines in new areas.

Utilities, including streets, are extended almost entirely at the cost of the developer. These costs are an important consideration in calculating the feasibility of developing any property.

All utilities within the City of Lodi are provided by the City, except telephone, gas and Cable T.V. services, which are provided by Pacific Telephone, Pacific Gas & Electric and Lodi Cable T.V. All development plans submitted to the City are reviewed by these companies. Sanitary City Disposal Company, a franchise collector, provides refuse disposal service for residential and commercial customers within the City. California Waste Removal Systems, Incorporated, operates a waste transfer facility on Cluff Avenue which is open to the public.

The developer is responsible for the installation of all sewer lines necessary to serve his or her development. Where a plan calls for a line twelve inches in diameter or larger, the City participates in the cost. Reimbursement agreements are prepared when a developer extends a sewer line that will also serve adjacent property. When the adjacent land develops, the reimbursement charge is collected by the City and paid to the developer.

There is a sewer connection fee charged to cover plant capacity and a monthly service charge to cover operational costs. Residential fees and charges are based on the number of bedrooms. Industrial users are charged on the basis of the strength and volume of the waste. Commercial charges are based on various land use-related measurement criteria, i.e. a restaurant is charged on the basis of seating capacity.

It is estimated that the City's White Slough Plant has sufficient treatment capacity to serve a maximum population of 46,031 in 1991 persons. This estimate is based on the following assumptions:

- 1) 80% of the capacity will be needed for residential users. (Industrial and Commercial users will require the other 20%).
- 2) Post drought water conservation conditions will continue. If water usage returns to predrought levels, it is estimated that only 41,428 persons could be served.

New water lines are sized based on the General Plan land use designations. Lines are being added or replaced in the older areas of the City on the basis of the existing and proposed land use densities. Upgrading is



EXHIBIT 50 IMPACT OF RISING INTEREST RATES ON MONTHLY MORTGAGE PAYMENTS

Loan Amount	18%	17%	16%	15%	14%	12%	10%
\$ 60,000	904	855	807	758	711	617	527
\$ 80,000	1,205	1,140	1,076	1,011	948	823	702
\$100,000	1,507	1,426	1,345	1,264	1,185	1,029	878
\$125,000	1,884	1,782	1,681	1,581	1,481	1,286	1,098
\$150,000	2,261	2,139	2,017	1,897	1,778	1,543	1,317
\$174,000	2,637	2,495	2,353	2,213	2,074	1,801	1,537
\$200,000	3,014	2,852	2,690	2,529	2,370	2,058	1,756

Source: California Federal Savings and Loan Association

(Chart shows estimated monthly payments for principal and interest only on a 30-year loan. Allowances for taxes, insurance and other impounds are not included.)

GOVERNMENTAL CONSTRAINTS IN MEETING HOUSING NEEDS

Residential development and redevelopment can only be possible when governmental and economic conditions can be met. Housing needs, therefore, are influenced by Federal, State and Local regulations and programs.

A. Land Use and Developmental Controls

Capacity of the Local Infrastructure - Utilities and Services

Perhaps the most significant prerequisite of development is the ability to receive public services and utilities. The availability of public services and utilities also determines the land value to a large extent.

The City's utilities, drainage system and the street system have a direct bearing on when a piece of property can be considered for urban development.

necessary to assure minimum daily flows and to provide an adequate supply for fire flows.

The City has an established water conservation program which has been effective in reducing water consumption. Residential water use is not metered; however, meters are required on new industrial and many commercial developments. Installation of water lines to City specifications is the responsibility of the developer. As new areas are developed additional wells are drilled using revenues from the water utility fund. The developer is responsible for the extension of all water mains; however, the City pays for oversizing mains where the increased size benefits the overall distribution system with funds from utility revenues.

The City of Lodi has owned and operated the electrical distribution system, which has served residential, commercial and industrial customers within the City limits since 1910.

All new developments proposed within the City are analyzed by the Utility Department in advance of construction, to determine power and equipment needs. Construction of the necessary facilities to city specifications are made a condition of all project approvals.

There are a number of streets which have adopted setback lines, in anticipation of future road widening. All street improvements, including curb, gutter and sidewalk and street lights are the responsibility of the developer, with City participation in South Hutchins Street and Lower Sacramento Road projects.

Construction and maintenance of private streets, such as those found in mobile home parks or condominium projects are the sole responsibility of the developer/owner and must be approved by the City.

Fire and Police protection is provided by the City of Lodi. A complete discussion of these services is contained in the City's Safety, Seismic Safety Element of the General Plan. Development proposals are reviewed by both agencies, and building permit applications are reviewed by the Fire Marshal.

Lodi is within the Lodi Unified School District, which serves nearly all of northern San Joaquin County, including portions of North Stockton. All residential units built in developments approved in Lodi after December, 1978 are subject to the tax at the time a building permit is approved.

Zoning

The traditional role of zoning is to protect the health, safety and welfare of the citizens while simultaneously assuring compliance with design standards for development.

Local zoning designations regulate the use of land and to a large extent, determine its value, by permitting specified uses in given densities in

precisely defined locations. As required by State law, zoning must be consistent with the policies set forth in the General Plan.

The City's Zoning Code in conjunction with the General Plan reflects the City's commitment to housing by establishing residential densities and by designating the infrastructure necessary to accommodate them. Although these requirements may tend to increase the cost per unit construction costs, it is interesting to note that in numerous cases, development in the City of Lodi has occurred at a much lower density than that allowed by the Zoning Ordinance.

 **EXHIBIT 51
RESIDENTIAL ZONING CLASSIFICATIONS
CITY OF LODI**

ZONE	DESCRIPTION	UNITS PER ACRE	MAXIMUM LOT COVERAGE
R-1	1 Family Dwellings	5.0	45%
R-2	1 Family Dwellings	10.0	45%
R-LD	Duplexes on corners Low Density	12.0	40%
R-GA	Multiple Family Garden Apartments	20.0	50%
R-MD	High Density Multiple Family	80.0	60%

Measure A

This voter approved ordinance has resulted in further control on development for those areas outside Lodi city limits. In addition to the typical development process, an additional step is required for the development of non-City properties; that being the approval of the Lodi electorate in a special election. (For additional discussion of Measure A, see page IX).

Permit Approval Process

The time requirements for acquisition of building and other permits vary greatly depending on the project size, type and location, and the amount of environmental documentation required. Recognizing the complex and time consuming nature of the permit process, the City of Lodi makes a serious attempt to expedite all development proposals.

Since development depends upon the existence of established facilities which have been installed and paid for by others, fees are charged by the City of Lodi for the provision of certain services and utility connections. Typical fees for construction of a new three bedroom home (excluding site development costs and fees) in Lodi on a parcel previously having utility connections and services are approximately \$800. Site development expenses are dependent on several other factors and are in addition to the

above figure. Fees and development costs may vary depending on type and quality of construction, size of dwelling, plumbing, electrical and mechanical equipment, etc. Commercial and industrial structures may be charged differently, based on the amount of services or utility capacity they draw. The development of large projects and subdivisions may require an Environmental Impact Report, for which additional fees may be charged. Plan check fees may also vary depending on the size and type of project. Developers of residential subdivisions will also be required to pay other fees, such as drainage fees "per acre" and a "per bedroom" tax for school facilities, as well as installing public facilities (on or off-site), such as street lights, curb, gutter and sidewalks, etc., to the City's standards.

TARGET AREAS

Target areas are defined as those areas which have concentrated housing needs. Data overlays were used to determine the areas in the City which are most impacted by the gaps in the housing market. Census Tracts 44.00 and 45.00 were determined to be the areas with the greatest degree of demonstrated need.

Census Tract 44.00 This tract is in the southeast corner of the City. 53% of the occupied units are renter-occupied. Over 19% have incomes below the poverty level. This housing is generally of low quality, a reflection of overcrowding, poor maintenance and structural inadequacies. Over seven percent of the units experience some degree of overcrowding. Structural and maintenance problems may be due to the age of the buildings as sixty one percent were built before 1950.

Census Tract 45.00 Census Tract 45.00 is in the northeast corner of town. Similar to Census Tract 44.00, Census Tract 45.00 has housing problems which are in large part, a result of an unstable population and a housing stock of relative low quality. 58% of the occupied units are renter-occupied. Some fairly severe problems are present in the housing stock of this area. A high percentage of the units appear to be receiving below normal maintenance or have been allowed to deteriorate without repairs. Many of these problems may be due to the age of the housing stock. 51% of the structures were built before 1950.

Within the target areas located in Census tract 44.00 and 45.00, the current allowable densities of up to 80 units per acre are a contributing factor in the loss of older single family homes. (Residential, High Density zones - R-HD, allows up to a maximum of 80 dwelling units per acre while R-MD would allow up to 40 units per acre). These zones cover all but a very small portion of the target areas, although the prevailing land use in portion of the census tract is stable, attractive, single family neighborhoods.

In the past, areas with declining housing condition were zoned at higher densities in hopes that the market place would eventually replace the older single family structures with newer, multiple family dwelling units. In many cases, this was the only method available to local agencies to combat deteriorating residential areas. Due to the cost involved in replacing existing units, the majority of the older homes have been retained and are presently helping to meet the City's demand for lower cost housing.

It is recommended that the target areas within Census Tracts 44.00 and 45.00 be designated as special study areas. Each block within the Special Study Area will be examined in terms of the following:

- a. Existing land use density and neighborhood character.
- b. Access to major streets
- c. City services infrastructure.
- d. Traffic generating capacity.

Through analysis of these factors, decisions can be made as to the appropriate zoning and land uses that would best serve the needs of the community as well as the existing residents in these areas.

 **EXHIBIT 52
HOUSING PROFILE -
CENSUS TRACTS 44.00 & 45.00**

	CENSUS TRACT 44.00	CENSUS TRACT 45.00
1. Renters	53%	41%
2. Overcrowding	7%	5.5%
3. Structures w/o Adequate Plumbing	21 units	58 units
4. Children Under 5	10%	8%
5. Elderly	18%	24%
6. Minorities (all non-white population)	16.2%	19%
7. Vacancy Rate	6.8%	7.1%
8. Median Income	\$12,009	\$14,000
9. Median Housing Value	\$39,500**	\$41,500*
10. City Median Housing Value	\$60,500	\$60,500
11. Median Contract Rent	\$ 173***	\$ 157***

* \$19,000 below City median

** \$21,000 below City median

*** City Median = \$185

TARGET GROUPS

Although the rising cost of housing affects all Lodi residents, a careful examination of those persons most severely affected is necessary in order to determine in what proportions, and to which groups assistance programs should be made available. A listing of priorities has been developed to serve as a guide for designating "Target Groups" for housing assistance.

GENERAL CRITERIA

1. People Now Living in Lodi

The needs of people now living in the City of Lodi should be given priority in the allocation of housing assistance. Priority should go to existing residents with low incomes as follows:

- A. Elderly residents (aged 62 and older).
- B. Single parent families.
- C. Other families with low incomes.
- D. Single person household.

2. People Working in Lodi

Second priority should go to providing housing to those who work in Lodi and wish to live within the City.

Within each group, priority should be given to "very low" income families over "low" income families. (H.U.D. currently defines households with incomes less than 50% of the county median as "very low" and those with incomes below 80% of the County Median as "low.") Of all families in 1980, 21% were in the category of "very low," 19% were classified as earning "low" incomes.

Priority ranking does not imply that one group will receive assistance before another, rather that housing assistance programs will be allocated on a proportional basis, depending on the absolute numbers of each population group. Exhibit 52 shows the population groups that fall under the general category of very low income groups and are ranked in terms of absolute numbers. Each population group represents a certain percent of the total number of very low income persons. This information will be used to assist decision-makers concerning program implementation in the future.

1. THE ELDERLY

Because of the particular needs of elderly individuals they will be given special consideration during the housing assistance process. Elderly citizens, who comprise 16% (5580 persons) of Lodi's population, are often faced with social, physical and economic constraints which may limit their ability to maintain or afford new or existing housing. It is estimated that over 10% elderly persons live at or below the

poverty level. This number represents 20% of all persons living at or below the poverty level.

2. SINGLE PARENT HOUSEHOLDS

Due to the constraints of time and money placed on single parent households with children under 18, households within this category should receive special consideration. Single parent households comprise 47% of all families earning incomes below the poverty level.

3. OTHER FAMILIES

"Other families" represent 41% of all families with incomes below the poverty level. This number excludes elderly-headed families.

 **EXHIBIT 53
LOW & VERY LOW INCOME POPULATION
GROUP • 1980**

POPULATION GROUPS	NO. VERY LOW INCOME PERSONS ¹	PERCENT OF TOTAL VERY LOW INCOME
Elderly Families (65 yrs.+)	93	12%
Single parent families (Female Headed - no husband present)	364	47%
Other Low Income Families	311	41%
TOTAL	768	100%

EXHIBIT 54
 **NUMBER OF FAMILIES WITH A FEMALE HEAD OF HOUSEHOLD 1980**

CENSUS TRACTS	42.01	42.02	43.02	43.03	43.04	44.00	45.00	TOTAL
Number of Families with children under 18	140	140	118	41	109	182	97	827
Percent with children Under 18	69%	60.6%	67.4%	64%	79.6%	72%	66%	68.3%
Number Under the Poverty Level with children Under 18	35	34	26	0	16	159	50	320
Percent of all Families Under the Poverty Level	47%	27%	29%	0	22%	39%	29%	42%
TOTAL NUMBER OF FAMILIES BELOW POVERTY LEVEL	75	127	91	0	72	251	125	241

SOURCE: 1980 Census of Population and Housing

TARGET GROUP DATA

A. ELDERLY

1. 1980 - Persons 62 years old and over comprised 18.9% of the total City population (6663 persons) - the percentage is projected to increase.

2. The following is the distribution of elderly households by Census Tract:

42.01 = 14% of tract population (861 persons)
 42.02 = 23% " " " (1,637 persons)
 43.02 = 31% " " " (1,730 persons)
 43.03 = 9.5% " " " (309 persons)
 43.04 = 8.0% " " " (364 persons)
 44.00 = 18% " " " (915 persons)
 45.00 = 24% " " " (844 persons)

B. SINGLE PARENT HOUSEHOLDS

1. 3.4% or 1,211 households are headed by a single female parent.
2. Of these 1,211 households, 387 or 32% are earning below poverty level incomes.
3. The following is the distribution of female headed households by Census Tract.
42.01 = 11.0% of tract population (204 households)
42.02 = 3.2% " " " (231 ")
43.02 = 3.1% " " " (175 ")
43.03 = 1.9% " " " (64 ")
43.04 = 2.9% " " " (137 ")
44.00 = 18.6% " " " (254 ")
45.00 = 15.9% " " " (146 ")

C. LOW INCOME FAMILIES

1. 2045 families fall into the category of "very low".1 This is 20.6% of all families in Lodi.
2. 2948 families fall into the category of "Low"1. This is 29.7% of the total number of families in Lodi.
3. The "Very Low" income households are distributed by Census Tract as follows:

42.01	13%	(245 households)
42.02	20%	(402 ")
43.02	21%	(316 ")
43.03	6%	(61 ")
43.04	12%	(152 ")
44.00	40%	(564 ")
45.00	35%	(305 ")

4. The Census Tract distribution of "Low" families is as follows:

42.01	16%	(543 households)
42.02	13%	(474 ")
43.02	12%	(454 ")
43.03	7%	(191 ")
43.04	15%	(452 ")
44.00	20%	(488 ")
45.00	19%	(346 ")

D. UNRELATED INDIVIDUAL

In 1980, unrelated individual households with Low or Very Low incomes comprised 9.1% of the Lodi population.

E. SPANISH ORIGIN

1. In 1980, households of persons of Spanish origin comprised 10%, or 3,525 persons.

The Census Tract distribution of persons of Spanish origin is as follows:

42.01	6.5%	of tract population	(404 persons)
42.02	6.7%	" "	(481 ")
43.02	7.2%	" "	(422 ")
43.03	3.3%	" "	(109 ")
43.04	8.5%	" "	(395 ")
44.00	21.3%	" "	(1086 ")
45.00	18.0%	" "	(528 ")

F. OVERCROWDED UNITS

- 3.5% (493 units) of all occupied housing units in Lodi are overcrowded. The Census Tract distribution is as follows:

42.01	2.2%	of households	(52 households)
42.02	2.0%	" "	(60 ")
43.02	1.8%	" "	(41 ")
43.03	0.9%	" "	(10 ")
43.04	4.3%	" "	(74 ")
44.00	7.7%	" "	(161 ")
45.00	5.9%	" "	(95 ")

THE HOUSING PROGRAM

The Housing Program Section is divided into the following sub-sections:

- A. Housing Program Goals and Policies
 - 1. Adequate Provision of Housing.
 - 2. Preservation and Conservation of Community Resources.
 - 3. Accessibility of Housing
- B. Policies for Implementing the Element
- C. Means of Implementing the Goals of Adequate Provision of Housing.
- D. Means of Implementing the Goals Pertaining to Housing Conservation.
- E. Means of Implementing Goals Pertaining to the Accessibility of Housing.
- F. Target Areas
- G. City of Lodi Contributions to the Provision of Housing

THE HOUSING PROGRAM

"Housing is a function of such scope and complexity that the participation and cooperation of federal, state and local government are viewed as necessary to provide the resources to meet demands for housing and related services. The local government cannot do it alone."¹

HOUSING POLICIES

In an effort to provide a framework for decision-making on matters which concern local housing, and recognizing that the provision of housing for groups such as low and moderate income households, the elderly and minorities will require an active role on the part of the City, the following policies will be observed:

1. The City will support the provision of decent housing in a satisfying environment for all persons regardless of age, sex, family status, race, religious affiliation or other arbitrary factors.
2. The City will promote the construction of housing in a variety of types, locations and price ranges.
3. The City will encourage the development of a balanced residential environment with access to employment opportunities, community facilities and adequate services.
4. The City will encourage the provision of special types of housing for groups with particular needs, including the elderly, the handicapped and low to moderate income families.
5. The City will act to preserve viable agricultural land to the maximum extent possible in the development and expansion of residential areas.
6. The City will encourage the protection and improvement of existing residential neighborhoods and individual housing stock.
7. The City will promote the development of educational, recreational and other public facilities as necessary contributions to desirable residential areas.
8. The City will participate in the Fair Share Housing Allocation Plan created by the San Joaquin Council of Governments.

¹ Housing and Local Government by Mary K. Nenno & Paul C. Brophy
International City Management Association, Washington, D.C., 1982.

9. The City will designate "target areas" as sites for low and moderate income housing as a basis for future rezoning requests.
10. The City will provide the necessary incentives to developers to encourage the provision of low and moderate income housing.
11. The City will encourage the use of manufactured housing where appropriate as a means of providing affordable housing.
12. Comprehensive programs of conservation rehabilitation and renewal will be undertaken in deteriorating areas.
13. All possible means will be used to ensure that all existing residential areas are provided with basic services including storm drainage, sewers, water supply and solid waste disposal.
14. To encourage the maintenance of existing neighborhoods, the City will:
 - a. Support and encourage neighborhood improvement programs.
 - b. Encourage the provision of public improvements and facilities in areas where they are determined to be substandard or do not exist.
 - c. Encourage participation of both public and private expenditures in the program.
 - d. Encourage the conservation of existing housing whenever possible.
15. The City will encourage the development and use of vacant urban parcels and the reuse of deteriorating areas.

The following are potential steps in the process necessary to achieve the stated policies of the Housing Program:

1. The use of HUD, CDBG & EDA Grants to fund the necessary improvements and services.
2. Application to other federal and state agencies as appropriate to construct necessary facilities and improvements.
3. Scheduling of street improvements, i.e. curbs, gutters, sidewalks, street resurfacing and reconstruction to coincide with other neighborhood revitalization efforts.
4. Enforcement of Building Code requirements on structures which are hazardous or which contribute to neighborhood blight.
5. The establishment of a Citizen's Committee to assess City-wide needs and to establish priorities for meeting those needs in target areas utilizing state and federal funds.

ADEQUATE PROVISION OF HOUSING

- I. GOAL: To provide safe, sanitary and affordable housing for all segments of the community.
- A. POLICY To make presently unaffordable (market rates) homes affordable for low and moderate income households.
- Implementation: Seek federally funded rent subsidies.
- Implementation: To make available special mortgage assistance programs offered to local communities by state and federal sources.
- Implementation: Provide an information service to advise homeowners about special mortgages.
- B. POLICY To provide measures to encourage the creation of housing for the elderly, single parent families and families with low or moderate incomes.
- Implementation: Investigate the feasibility of a housing project for the elderly located in the downtown area.
- Implementation: Develop an incentive program which encourages new developments to designate a percentage of the units to supply housing for particular needs in the community groups.
- Implementation: To inform local developers about financing programs for the construction of housing for particular need groups.
- Implementation: Create a special permit process which encourages low and moderately priced developments by giving them high priority.
- C. POLICY To insure the adequate provision of land for future residential use.
- Implementation: Develop and maintain consistency with a residential phasing plan
- D. POLICY To maintain the availability of existing lower cost housing. Implementation: The city shall enact housing conservation efforts to prevent the loss of existing housing units. (Specific policies and implementation measures are found in the housing conservation section).

II. GOAL To provide for the protection and improvement of Lodi's existing residential neighborhoods and individual housing stock.

A. POLICY Provide measures which prevent the deterioration of presently adequate structures, and ensure that substandard housing will be upgraded.

Implementation: To work with the department of Housing and Urban Development and the State Department of Housing and Community Development in identifying sources of available rehabilitation assistance.

Implementation: Educate the community of the advantages to individuals of housing conservation; tax incentives and specialized rehabilitation loans and mortgages.

Implementation: To develop and initiate a code enforcement program directing its priorities of action to:
(a) structures within designated target areas; and
(b) multiple family and renter-occupied units within those target areas.

B. POLICY Provide for the maintenance and improvement of the quality and diversity of Lodi's existing residential neighborhood areas.

Implementation: Develop and utilize target areas to concentrate the application of housing conservation loan programs, grants and code enforcement.

Implementation: Establish a special study area to investigate the feasibility of down-zoning portions of the eastern side of town (target areas within census tracts 44.00 and 45.00) to:
(a) Preserve the presence of stable single family neighborhoods, and
(b) More closely approximate the actual developing densities of present construction.

Implementation: Use "Block Zoning" to ensure that the use of High density residential, commercial, and industrial designations does not deter the conservation of older residential neighborhoods.

C. POLICY Direct housing conservation efforts so that the housing supply remains within the financial means of Lodi residents.

Implementation: Combine available rent subsidy programs with housing rehabilitation efforts wherever possible to maintain affordability in rehabilitated units.

Implementation: Establish a public improvement program in selected neighborhoods to encourage private redevelopment.

Implementation: Provide assistance in finding loans or grants which would allow substandard owner-occupied housing.

PRESERVATION AND CONSERVATION OF COMMUNITY RESOURCES

I. **GOAL:** To provide for the preservation of the city's physical environment and its historic structures.

- A. **POLICY** To insure that the adequate provision of housing does not negatively alter the present quality of Lodi's physical environment.
- Implementation: Enforce performance standards for residential areas which set maximum limits on noise levels and traffic volumes consistent with the noise element.
- Implementation: Work with state and federal agencies to enforce present air and water control standards.
- Implementation: Encourage the creation of parks in flood zones in order to:
- (a) Allow pedestrian access to and along local waterways;
 - (b) Preserve the area's natural environment; and
 - (c) Protect lives and private property.
- Implementation: Develop a system of neighborhood parks to:
- (a) Serve the community's recreational needs;
 - (b) Act as a buffer between areas of conflicting land use; and
 - (c) Provide a source of neighborhood identity.
- B. **POLICY** To ensure that buildings of historic importance are protected and maintained.
- Implementation: Encourage the creation of a city historical protection society.
- Implementation: Provide planning assistance in the development of historic preservation programs.

II. **GOAL** To Provide for the Conservation of Agricultural Land and Energy Resources

- A. **POLICY** Direct the development of new housing so that the disruption of viable agricultural areas can be minimized.
- Implementation: Promote development efforts within and continuous to existing city limits.

Implementation: Ensure adherence to the residential phasing plan.

B. POLICY Encourage the utilization of energy efficient design and technology in the development of individual units and subdivisions.

Implementation: Recognize the importance, and insure the application of the California Energy Regulation Codes in new development proposals.

Implementation: Create and enforce guidelines for energy efficient housing orientation and subdivision design.

Implementation: Encourage new subdivisions to provide accommodations for transportation alternatives to the automobile (i.e. pedestrian walkways or bicycle lanes).

C. POLICY Encourage the application of energy efficient design and technology to existing housing and subdivisions.

Implementation: Provide guidelines for and incentives to renovate housing to increase their energy efficiency.

Implementation: Coordinate efforts with the public utilities department in the creation of an educational program which promotes energy conservation in the home.

Implementation: Assist the public works department in identifying areas where implementation of the existing tree planting program would significantly reduce the conductive properties of asphalt, in addition to beautifying the area.

Implementation: Investigate the feasibility of a jointly funded housing rehabilitation and energy conservation package within the public works department.

ACCESSIBILITY OF HOUSING

I. **GOAL** To work toward eliminating housing discrimination in Lodi.

A. **POLICY**

Support efforts to eliminate discrimination in housing with regard to race, religion, national origin, sex, age or family status.

Implementation: Investigate the problem of housing discrimination in Lodi.

Implementation: Encourage the local news media to adopt the Federal Housing and Urban Development non-discrimination disclosure.

POLICIES FOR IMPLEMENTING THE ELEMENT

POLICY 1

To develop and enact an annually reviewed and revised housing assistance programs which would implement the goals and policies of the adopted Housing Element.

POLICY 2

To review present residential zones and corresponding densities and evaluate whether they reflect the current development pattern and housing demand.

POLICY 3

To ensure that the existing city zoning ordinance conforms to the goals and policies of the adopted housing element.

POLICY 4

To incorporate citizen participation in planning and evaluating the city housing element and its housing assistance program.

MEANS OF IMPLEMENTING THE GOAL OF
ADEQUATE PROVISION OF HOUSING

To provide measures to make presently unaffordable (market rate) homes affordable for low and moderate income households.

Perhaps the most flexible and achievable means of making presently unaffordable homes and apartments affordable to lower income persons is to actively seek federally funded rent subsidies. Currently, Section 8 - a rent subsidy program - is the main source of federal housing assistance for low income persons, The Department of Housing and Urban Development provides rent supplement payments to owners of rental units to make up the difference between market rate and the amounts that eligible elderly, handicapped, and other low income families are required to pay. These programs can be administered city-wide (as long as rents don't exceed an established rent ceiling limit) and does not have the affect of concentrating large numbers of lower income persons in small areas.

To make available special mortgage assistance programs offered to local agencies by state and federal sources.

There are several mortgage assistance programs available to local governments that enable low and moderate, elderly and handicapped households to afford home ownership and home rehabilitation. In several cases, such as the "Home Ownership, Home Improvement" mortgage assistance programs offered by California Housing Finance Agency (CHFA), administration of these loans is handled, at the local level, by participating local lending institution (i.e. local banks) and by CHFA. By merely authorizing CHFA to arrange for the distribution of these loans within the city, the city takes those steps necessary to initiate these mortgage assistance programs when available.

Provide an information service to advise homeowners about special mortgages.

In order that homeowners become aware of the existence of special mortgages, the Community Development Department should act as an information source to provide necessary details about the availability and eligibility criteria of special programs.

Investigate the feasibility of a housing project for the elderly located in the downtown area.

The possibility of converting existing structures in the downtown area into a housing complex for the elderly with supporting facilities shall be investigated. A project of this nature could offer below market rate housing for the elderly and serve as a focal point and catalyst for the strengthening and improvement of the downtown area.

Develop an incentive program which encourages new developments to designate a percentage of the units supply housing for particular need groups in the community.

A commonly used process to encourage developers to include low and moderate housing in new developments is to offer incentives which make the provision of below market rate housing more attractive and economically beneficial.

The principle advantage of providing low and moderate housing by this method is that it does not concentrate lower income housing in any one area, as is commonly found in residential development projects and low income housing construction projects.

1. Lot size flexibility - allow lot size reduction in R-1 and R-2 zones for those units conditionally designated for low and moderate income (below market rate) housing.

Single family unit lot size reduction for below market rate (BMR) housing. In R-1 and R-2 zones.

(BMR) LOT SIZE BONUS FOR SINGLE FAMILY UNIT: R- ZONE

STANDARD	PRESENT	PROPOSED
Minimum Sq. Ft.	6,000	5,000
Minimum Lot Width	60 ft.	50 ft.
Maximum coverage	40%	45%

Additionally, the BMR units could be placed on a scattered site basis within each development, and consist of from 10 to 20 percent of the total number of units in developments of under 100 units. Developments over 100 units would be dealt with by the Planning Commission on a project-by-project basis.

2. Reduction of parking requirements for elderly units - Reducing the number of parking spaces required in multiple dwelling units for those units conditionally designated for elderly residents can be an effective means of reducing development costs as an incentive to include below market rent apartments for the elderly.

Currently in multiple family dwellings (except R-HD zones), one and one-half off-street parking spaces are required for each unit of the

project. By reducing this requirement to only one parking space for each unit of elderly housing, square footage normally committed to parking can be added to the floor space of the project potentially increasing the profitability of the site and allowing lower rents for the conditionally designated elderly units.

Additionally, for R-HD zones which require one off-street parking space per unit, the requirement for conditionally designated elderly units can be lowered to one-half space per unit (minimum of 2 units with one space).

3. Expediting the permit process - The cost and time required to obtain building permits needed in any housing project certainly adds to the cost of the development.

As an additional incentive to include low and moderate income housing, those projects containing units of this nature should be given priority. As an example, a particular staff person, knowledgeable of below market rate housing, should be designated to shepherd these development applications quickly through the permit process.

Additionally, permit fees should be examined to determine the feasibility of reducing costs to developers on those units conditionally designated for low and moderate income households.

4. Providing information to developers about financing programs for the construction of housing for particular need groups - Few developers have had experience in dealing with subsidized housing construction. The regulations for these programs and the availability of the programs vary from year to year. Additionally, the application process is often very complicated.

The city can assist developers through staff assistance by identifying available land, applicable housing finance programs as well as assisting them in fulfilling application requirements

5. Developing and maintaining consistency with a residential phasing plan - Lodi has a unique problem in providing new areas for expansion. Because of its almost flat topography, a sizeable investment must be made to provide ponding basins and the accompanying drainage systems to adequately handle runoff water from all areas of the community.

Because of this necessary and costly investment the city must plan far in advance its pattern of expansion. The direction of future residential growth is as subject to this limitation as any other land use in the community. Consequently, this restriction, as well as other planning criteria has been carefully joined to develop a phasing plan for the future expansion of Lodi's residential neighborhoods.

The purpose of residential phasing:

- (a) The plan is intended to prevent leapfrog development, disallowing "island development" or the entrapment of undeveloped land.
- (b) The plan would also prevent the surrounding of currently productive agricultural land causing land use conflicts between new residential development and the day-to-day operation procedures of farming.
- (c) Prevent the premature and speculative removal of productive agricultural acreage resulting in large acreages standing unproductive for several years.
- (d) Coordinate residential growth with the expansion of required facilities such as water, sewer and storm drainage.
- (e) Assist the fire and police departments in anticipating future demand and direction of the necessary fire safety and police protection services.

To work with the Department of Housing and Urban Development and the State Department of Housing and Community Development in identifying and securing the most appropriate sources of available rehabilitation assistance.

Due to the continually changing nature of housing programs the Community Development Department should keep close contact with the state and federal agencies (namely HUD AND HCD), responsible for housing programs.

Communication and coordination of this nature can accomplish two things: First, it will enable the city to more fully understand the direction and intent of federal and state programs, enabling Lodi to more effectively utilize existing programs; and secondly, it would provide the city with the early information as to programs soon to become available.

Educate the community on the advantages of housing conservation: Tax incentives and specialized rehabilitation loans and mortgages.

The Community Development Department shall assume the role as information distribution agency on all housing rehabilitation matters. Information will be made available to the public concerning the availability of special housing programs through public hearing, media coverage, and printed materials as necessary.

MEANS OF IMPLEMENTING THE GOALS
PERTAINING TO HOUSING CONSERVATION

Educate the community on the available funding sources
for home repair and rehabilitation loans.

LOANS

The following loans are potential sources of funds for home repair and rehabilitation loans:

- (1) Index Loans - are loans whose payments are based on the borrowers monthly income.
- (2) Variable rate mortgage - a mortgage whose interest rate shifts with the going rate. This makes money more readily available by shifting the risk of rising interest rates to the borrower.
- (3) Rollover Mortgage - a variable loan whose interest is adjusted only every 5 years.
- (4) Graduated Payment Mortgages - are fixed rate mortgages whose payments start low but grow larger. Intends to aid young or new families to enter the housing market earlier.
- (5) Reverse Annuity Mortgage - provide monthly annuity payments to homeowners based on their home's equity; helps elderly.
- (6) Deferred Payments - no monthly payments. Payments will be made when the property is transferred or at a mutually agreed upon date.

Code enforcement is one of the few effective programs which can be directed toward rehabilitation that does not require outside subsidy and regulation. Local control of the code enforcement process allows the city a high degree of flexibility as to how this rehabilitation tool is administered.

There are five commonly used methods of code enforcement which the City could elect to do - each having different demands on city resources:

- (1) Disclosure of conditions (truth-in-sale-of-housing). At least seven cities in California have ordinances requiring that certain information be revealed to buyers of homes before purchase to protect them from problems which, if known, would have discouraged them from buying or changed the terms under which they would have purchased.

Disclosure ordinances require that the seller reveal to the buyer such information as zoning of the property, property tax for the previous year, assessment bonds, outstanding code violations, future street widening, and required off-site improvements, and structural additions or alterations for which permits were obtained. This type of ordinance has received wide support, including the California Association of Realtors.

- (2) Complaint - Response Code Enforce

Perhaps the most commonly used and most feasible for Lodi is the complaint response method of code enforcement. The city simply inspects homes based on complaints or reports from neighbors or tenants. From time to time violations may be spotted during a casual neighborhood visit or during a required inspection of a new addition or modification to an existing unit prior to the issuance of an occupancy permit.

With the present workload of the building department, this method is perhaps the most realistic approach until such time as additional personnel can be added to the building inspection staff.

- (3) Concentrated Code Enforcement Activities.

A second common form of code inspection, which should be designed to correspond with the designated target areas in Lodi, is a concentrated code enforcement program. Unlike complaint response, the concentrated approach would focus on Lodi's designated target areas. In these areas, a more intense level of code enforcement would be provided.

Priority of inspection would be directed inward multiple family and renter- occupied single family dwellings, giving second priority to owner- occupied dwellings that generally have a lower incidence of deterioration.

(4) Voluntary Home Surveys.

As an alternative, some cities operate voluntary inspection programs or "Home Surveys" providing a free-of-charge code inspection upon request of owner or buyer. This approach tends to result in smaller usage since owner-sellers are often hesitant to risk an inspection. If the purpose of the program is to encourage maintenance and repair, however, a voluntary program can be instituted with the city providing the service is free of charge.

(5) City-wide pre-sale code enforcement program requires that prior to sale or rental of a single or multiple-family housing units, a city housing inspection must be completed and the housing unit be brought up to housing code standards. The main purpose of such programs is to ensure the continued maintenance of a City's Housing Stock.

This program would be an extensive draw on the time and resources of the building department and would be an infeasible alternative at this time.

Consideration has been given to all of the alternatives mentioned above, and given the current size and workload of the building inspection staff, the most effective and credible method of code inspection at this time is a complaint response program which establishes the following priorities:

- (1) First priority of inspection goes to complaints received from housing units that lie within the designated target areas.
- (2) Renter occupied and multi-family units received priority of response over single family units.

At such time as the building inspection staff can be expanded, a concentrated code enforcement program utilizing the same priorities mentioned above should be initiated.

To be effective, code enforcement programs must be coordinated with other rehabilitation and relocation efforts, such as low interest loans to finance repair and rehabilitation, and subsidies for those families who can't afford to make needed corrections.

The city and county should provide guidance and technical assistance to residents who wish to make their own repairs.

MEANS OF IMPLEMENTING THE GOALS PERTAINING TO
PRESERVATION AND CONSERVATION OF COMMUNITY RESOURCES

To achieve these goals, the City actively pursues the following:

1. Enforce performance standards for residential areas which set maximum limits on noise levels and traffic volumes.
(See San Joaquin county Council of Governments, Noise Element Goals and Policies).
2. Work with state and federal agencies to enforce present air and water control standards.
3. Encourage the creation of parks in flood zones in order to:
 - a. Allow pedestrian access to, and along local waterways;
 - b. Preserve the areas natural environment; and
 - c. Protect lives and private property.
(Refer to Lodi's Open Space - Conservation Element: page 56 for Policies).
4. Develop a system of neighborhood parks in order to:
 - a. Serve the community's recreational needs;
 - b. Act as a buffer between areas of conflicting land use;
 - c. Provide a source of neighborhood identity; and
 - d. Encourage application for all available state and federal funds to be used for continued development and acquisition of parks and recreation areas.
5. Encourage the creation of a city historical protection district.
6. Provide planning assistance in the development of historic preservation programs.
7. To Provide for the Conservation of Agricultural Land, the City will:
 - a. Promote development efforts only in those areas within city limits.
 - b. Insure adherence to the residential phasing plan and the mandate of the Greenbelt Initiative. (See page VIII).
 - c. Recognize the importance and insure the application of the California Energy Regulation Code in new development proposals.
 - d. Coordinate efforts with San Joaquin County for enforcement of guidelines.

MEANS OF IMPLEMENTING THE GOALS PERTAINING TO THE ACCESSIBILITY OF HOUSING

To insure the accessibility of housing for all segments of the community, the city will:

1. Investigate the problem of housing discrimination in Lodi.
2. The planning department will provide assistance, if necessary, to those complaining of discrimination.

TARGET AREAS

1. Target areas will be designated to concentrate the application of housing conservation loan programs, grants and code enforcement.

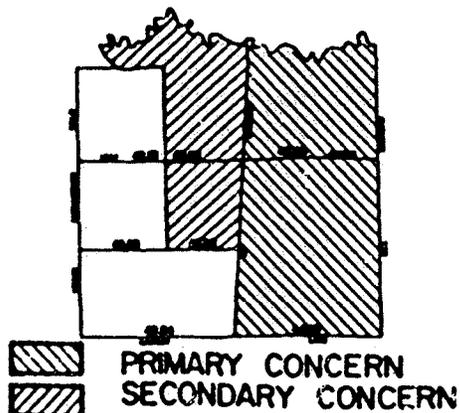
Target areas have been developed for two purposes: First, to more clearly define areas of concentrated need, and secondly to act as a tool for directing resources and programs to specific areas that will benefit most from housing conservation assistance.

Census data was analyzed to determine those Census Tracts with the greatest number of housing condition deficiencies. Exhibit 55 shows the two areas with the greatest demonstrated housing need are census tracts 44.00 and 45.00. These tracts contain both physical and population characteristics that are indicators of declining housing quality. These two census tracts have been designated as areas of primary concern. Census tracts 42.02 and 43.02 also have large concentrations of older homes and are likewise experiencing signs of declining housing quality. These census tracts have been indicated as Areas of Secondary Concern.

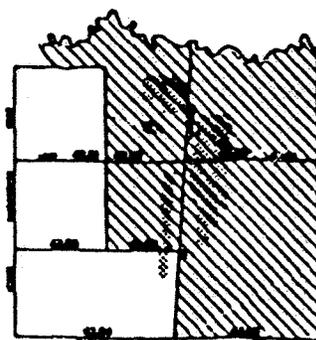
Further definition of the target area is added by overlaying specific areas where housing deterioration was found to exist in the housing condition survey. Within this double shaded area lies the greatest percentages of the housing condition indicators as well as percent of all structures found to be substandard. These areas shall constitute the "target areas."

EXHIBIT 55 TARGET AREAS

**PHYSICAL CHARACTERISTICS
AREAS OF CONCERN**



TARGET AREAS



Housing rehabilitation programs will be "targeted" for these areas and concentrated code enforcement programs will be initiated when additional inspecting staff becomes available.

2. Establish a special study area to investigate the feasibility of rezoning portions of the eastern side of town (target areas within census tracts 44.00 and 45.00) to:
 - a. Preserve the presence of stable single family neighborhood and;
 - b. More closely approximate the actual developing densities of current construction in areas found suitable for multiple family housing.

Within the target areas located in census tract 44.00 and 45.00 the currently allowable densities are a contributing factor to the loss of older single family homes. The residential High-Density (R-HD) zoning in census tract 45.00 allows a maximum of 80 units per acre, while Residential Medium-Density (R-MD) zoning in census tract 44.00 allows a maximum of 40 units per acre. These zones cover all but a very small portion of the target areas, even though the census tracts currently contain large areas of stable, attractive, single family neighborhoods. The current zoning in these census tracts is presently causing the following:

- a. The removal of valuable, lower cost, older single family homes.
- b. Disrupting substantially stable single family residential neighborhoods.
- c. Increasing the problems (i.e. crime, noise, traffic) associated with multiple family dwellings in areas already identified as problem areas.
- d. Adding to an already inadequate water, storm drainage and sewer system which will have to be substantially upgraded in order to meet current allowable densities.
- e. Lack of open space (parks) and recreational facilities for the increased population as existing facilities were designed for single family densities.
- f. Congestion of alleys not designed to handle increased traffic flow.

In the past, the city zoned areas with declining housing conditions, high density, in hopes that market forces would eventually replace the older, single family structures with newer, multiple family dwelling units. In many cases this was the only method available to local agencies to combat deteriorating residential areas, and was done at a time when older homes were not considered a valuable resource.

Ignoring this situation would be a costly mistake for the city and for the residents within these neighborhoods, both in terms of compounding utility

problems and the continued loss of lower cost single family housing. What is recommended is the designation of the two target areas found in census tracts 44.00 and 45.00 as Special Study Areas. Within each of these Special Study Areas, each block will be examined in terms of its existing land use, density, serviceability, traffic-generating both capacity, capability, access to major streets, and existing neighborhood character. Only through careful examination of these and other factors can appropriate decisions be made as to the type of zoning and allowable densities that would best serve the needs of the community as well as the existing residents.

3. Use "Block Zoning to ensure that the use of high density residential, commercial and industrial designations does not deter the conservation of older residential neighborhoods. as a source of low cost housing.

The City should conduct a pilot study of particular target areas to observe the effects of block zoning on housing conservation.

4. Combine available rent subsidy programs with housing rehabilitation efforts wherever possible to maintain affordability in rehabilitated units.

Often when rental units are rehabilitated, property owners will raise rents to offset the cost of rehabilitation even if it is accomplished through a subsidized program. In the absence of any rent control measures, rent subsidy programs can be attached, wherever possible, to housing rehabilitation projects thus maintaining the affordability if rent must be increased. Section 8 rental subsidy is the current federal program of this nature, providing housing assistance payments to owner, developers, and public housing agencies to make up the difference between "fair market rent" of a unit (set by HUD) and tenant's contribution toward the rent (at least 15%, but not more than 25% of income).

5. Establish a Public Improvement Program in selected neighborhoods to encourage private redevelopment.

The intent of a Public Improvement Program is to encourage private investment through public investment. The program should concentrate on Neighborhoods with high amounts of deteriorating or dilapidated, but preservable, housing. Possible programs of implementation include:

- a. Neighborhood Housing Services

The purpose of a Neighborhood Housing Service is to pull together various community resources to increase lending in neighborhoods showing signs of deterioration. It should be implemented in neighborhoods where mortgages and home improvement loans are difficult to obtain but where there is a high percentage of resident ownership. The housing services would offer

financial counseling, legal service referrals, contractor referrals and help finance redevelopment through low interest loans.

b Neighborhood Preservation Program

After target areas have been designated, local government provides public services, administrative assistance and public improvements. Local government may also apply for California Housing Finance Agency Market bonds to purchase home improvement loans and home purchase loans from private lenders.

c. Marks - Foran SB 99

d. Local Financing Vehicles.

e. Craftsman Projects, Craftsman projects utilize unskilled workers (CETA, etc.) to perform rehabilitation.

f. Tool-lending Program

This programs provides tools and information to those owners who wish to do rehabilitation themselves.

g. Provide assistance in finding loans or grants which would allow substandard owner - occupied homes to be rehabilitated.

CITY OF LODI CONTRIBUTIONS TO THE
PROVISION OF HOUSING

The City of Lodi recognizes that a major hindrance to the provision of adequate and affordable housing is the substantial costs involved in providing the infrastructure to serve residential developments. It is also recognized that the older areas of the City have historically been a major source of the available lower cost housing stock. As a means of insuring the viability of these areas, the City participates in the construction of a number of improvement projects each year. Funded by the General Fund or Revenue Sharing, these projects improve service in existing, developed areas by replacing substandard facilities with systems equal to those required in new developments.

Storm Drainage

The following projects include those which have been completed in the past few years as well as a list of projects proposed for construction through 1986.

<u>Project/Limits</u>	<u>Fiscal Year Completed/Planned</u>	<u>Total Cost</u>
Catch Basin Replacement Various locations	1973	\$ 23,000
Locust Street Storm Drain Church St. to Sacramento St.	1977	\$ 41,000
Locust Street Storm Drain Church St. to 200' W/Church St.	1977	\$ 18,000
Walnut Street Storm Drain Central Ave. to Garfield St.	1977	\$ 18,000
Catch Basin Replacement Various locations	1979	\$ 21,000
Church Street Storm Drain Forrest Avenue to Olive Court	1979	\$ 28,000
Crescent Avenue Storm Drain Walnut Street to Pine St	1979	\$ 44,000
Salas Park (D-Basin) Excavation & Fencing	1980	\$ 62,000
Catch Basin Replacement Various locations	1980	\$ 29,000
Cherokee Lane Storm Drain Vine Street to 100' S/Vine St	1980	\$ 7,000
Catch Basin Replacement Various locations	1981	\$ 20,000
Central Ave/Eden St. Storm Drain Hilborn St to Tokay St Central Ave. to Garfield St.	1981	\$ 71,000
Main Street Storm Drain Elm Street to Lockeford St.	1982	\$ 86,000
Shady Acres Pump Station Reconstruction	1983	\$342,000

<u>Project/Limits</u>	<u>Fiscal Year Completed/Planned</u>	<u>Total Cost</u>
Catch Basin Replacement Various locations	1982	\$ 20,000
Elm Street Storm Drain Main Street to Washington St.	1983	\$118,000
Westdale Drainage Improvements	1983	\$ 86,000
Maple St. & Central Ave Storm Drain Stockton St. to Central Ave. Alley S/Maple to Maple	1983	\$127,000
Roper/Palm/Grant Storm Drain Eureka to Turner Roper to Grant Eureka to Palm	1984	\$112,000
Acacia Street Storm Drain Stockton to Central	1985	\$104,000
Olive Court Storm Drain Pleasant Ave to School St	1986	\$ 72,000
Catch Basin Replacement Various locations	Annual	\$ 20,000

Water and Sewer

The City's water and sewer facilities are generally adequate to serve existing developed areas. Due to a combination of age, design problems and pipe material, a certain number of substandard mains do exist in the older portions of the City.

The water system Master Plan identifies a number of streets where new water mains are needed to reinforce the existing system in order to insure adequate flows and pressures during major fires. The City generally funds the construction of one water main project per year. In addition, a number of new fire hydrants are installed on existing mains to improve service.

The projects listed below are in existing developed areas and are funded by City funds. Projects serving undeveloped residential, or commercial and industrial property are not included.

Project/Limits	Fiscal Year		Total Cost
	Completed	Planned	
Ham Lane Sanitary Sewer Lockeford to Turner	1977		\$ 86,000
Louie Ave/Grant Ave Water Main	1979		\$ 24,000
Church Street Water Main Daisy to Forrest	1981		
Church Street Water Main Tamarack to S/Tokay St.		1983	\$ 74,000
Washington Street Water Main Mission to Watson and Watson Street Water Main Stockton to Central		1983	\$ 62,000
Palm w/Roper to California and Grant Avenue Water Mains Louie to Palm		1984	\$108,000
Locust Street Water Main Fairmont to Crescent		1985	\$ 48,000
Lincoln St./Edgewood Dr Water Main Turner to Midvale		1986	\$ 89,000
Elliot to Kimberly Water Mains Orange to Crescent		1987	\$ 41,000

Street System

The City attempts to maintain all its streets to a high standard by

- 1) performing preventative maintenance on a systematic basis
- 2) controlling the quality and number of cuts for utilities
- 3) reconstructing streets rather than adding thick overlays
- 4) repairing poor curb and gutter to prevent water from ponding on the street.

Funding for street maintenance is primarily from gasoline taxes and City General Funds. Major reconstructions are primarily funded by Transportation Development Act funds (sales tax on gasoline) and Federal Aid-Urban funds (federal gasoline tax). The following list excludes projects on arterial and collector streets even though some are fronting residential projects.

Projects/Limits	Fiscal Year		Total Cost
	Completed	Planned	
Maintenance Overlays		Annual	
Various residential streets			approx. \$ 55,000
Maintenance Slurry Seals		Annual	
Various residential streets & alleys			approx. \$ 25,000
Miscellaneous Maintenance City-wide		Annual	approx. \$ 60,000
Miscellaneous Curb & Gutter Replacement City-wide		Annual	approx. \$ 20,000
Curb & Gutter Replacement:			\$120,000
Garfield St., Hilborn to Lodi	1979		
Central Ave., Oak to Walnut			
Washington St., W/Side N/Oak			
Oak St., Stockton to Washington			
Curb & Gutter Replacement:			\$ 29,000
Central Ave., Elm to Locust	1980		
Pleasant Ave., Lodi to Walnut & Central Ave., Lodi to Alley			
S/Hilborn	1981		\$138,000
Curb & Gutter Replacement:			\$ 13,000
Howard St., Lake to Holly		1983	
Various Locations		Annual	\$ 50,000

In addition to the specific programs listed previously, the City of Lodi, through its Zoning Ordinance, provides the necessary flexibility and design options for land developers in providing needed housing.

1. The Zoning Ordinance provides for residential densities which are much higher than traditionally built in Lodi. For example, the R-HD zone would allow up to 80 dwelling units to the acre as long as Zoning Code requirements were met. Traditionally, most R-HD developments have not exceeded 20 to 25 units per acre.

- 2 The Planned Development (P-D) zone of the Lodi Zoning Code provides for mixed land uses and deviations from strict adherence to the other residential zone classifications. Through the use of the P-D zone, a developer could provide a total design concept for the construction of housing for special need groups within the City.
3. Relatively recent changes in State law pertaining to Mobile and manufactured homes apply to the City of Lodi. As a result, modular, mobile or other manufactured homes can be built on lots zoned for traditional "stick-built" single family homes.

In this way the City of Lodi complies with the Statewide goal of supporting manufactured housing as a viable and necessary means of providing low and moderate income housing. (See Appendix G).

APPENDIX A

FUNDING THE HOUSING PROGRAM

FEDERAL RESOURCES

1. Section 8 - This program, authorized by the Housing and Community Development Act of 1974, is designed to assist those households receiving less than 80% of the County's annual household income in finding adequate rental housing in the private housing market. Families who qualify for the program receive rent supplements for housing units selected from the private market, in an amount which reduces their share of the rent to 25% of the family's adjusted income.
2. Section 235 - This program, authorized by the Housing Act of 1968, was designed to enable low and moderate income families to purchase homes by insuring low interest mortgage loans. A maximum of a \$38,000 mortgage, limits the use of this program in Loui since the median price of a single family home is \$60,500.
3. Community Development Block Grants (CDBG) - This program is the Department of Housing and Urban Development (HUD's) primary means of providing local community development assistance. These funds may be used to pay for start-up, administrative and other pre-development costs. In addition CDBG funds can be used for the following:
 - o Land acquisition and write down.
 - o Financing Fees.
 - o Preliminary architectural drawings.
 - o Public improvements (i.e. water, sewer, curbs, gutter, sidewalks, storm drains, etc.) when it is demonstrated that these uses facilitate support or serve housing developments for low income people.
 - o Acquisition of property for rehabilitation.
 - o Direct rehabilitation loans.
 - o Loan guarantees to induce banks to lend at more favorable interest rates.
 - o Interest subsidies and partial grants.
 - o Financing of the Section 8 programs.
4. Section 106(b) - Administered by HUD to provide seed money loans to sponsors of housing for the elderly and handicapped. Loans may cover a maximum of 80% of the preliminary development costs but may not exceed \$50,000.
5. Section 11(b) - Authorizes public housing agencies, or non-profit private or public agencies designated by them, to issues tax-exempt obligations to finance both non-profit and profit-motivated Section

8 housing. The purpose of this financing is to lower interest costs and provide longer term mortgages. Must be used in projects with 100% Section 8 subsidy.

6. Section 312 - Rehabilitation Loans - This program is available to owners and tenants of multi-family housing in neighborhood development, urban renewal and Code enforcement areas. The program is designed to promote neighborhood revitalization by providing funds for the rehabilitation of multi-family housing properties. Direct loans are made at low rates for long terms. Specific rates are determined for individual loans.
7. Urban Development Action Grants - This program is designed to stimulate new development and investments through a partnership among the government, the community and private industry to overcome economic stagnation and stimulate the rehabilitation of deteriorating urban areas.

Any city demonstrating evidence of economic distress and has a record of providing low and moderate income housing and employment programs. Cities with populations between 25,000 and 50,000 must meet at least 3 of the following criteria:

- o Age of Housing.
- o Per Capita income
- o Population growth, lag or decline.
- o Poverty.
- o Job lag or decline.
- o Unemployment.

Eligible activities include:

- o neighborhood revitalization.
- o job creation.
- o strengthened tax bases.
- o rehabilitation and construction of public, commercial, industrial and residential structures.

Projects will be assessed based on:

1. the comparative degree of physical and economic distress, or
2. the demonstrated ability of the applicant to successfully carry out housing and community development projects.

Ineligible Activities:

Application development, project planning, public services and the relocation of commercial or industrial facilities from one metropolitan area to another.

NOTE: No application will be approved without a firm commitment of private resources.

Requirements: All cities establishing pockets of poverty must meet the following criteria:

- o 70% of the residents of a segment must have incomes below 90% of the overall median income.
- o At least 30% of the residents of a segment must have incomes below the national poverty level.
- o Demonstration that the proposed project will benefit low and moderate income residents in terms of the following:
 - Employment opportunities, services, physical improvements, repayment of action grant funds by the private sector, minority ownership opportunities and job opportunities for persons eligible for CETA programs.

8. Investment Tax Credit for Rehabilitation - This program is designed to encourage the rehabilitation of residential, commercial or industrial structures. A 25% tax credit is available for rehabilitating certified historic residential or commercial structures.

Individual owners, partnerships, consortiums, stockholders and private organizations. A lessee is eligible if the remaining lease term is at least 15 years.

The credit does not apply to the costs of investing in or buying and enlarging a building. At least 75 % of the existing external walls must be retained as external walls.

Requirements: Taxpayers using the credit must use straight line depreciation. The credit can be used to offset \$25,000 plus 85% of the remainder of the tax liability. Credits not used can be carried back three years to obtain refunds of tax taxes or carried ahead each of the 15 following years to reduce future tax payments.

Taxpayers using certified historic structure investment tax credits are required to reduce the basis of assets by 50% of the credit.

Rehabilitated buildings may be leased to tax exempt organizations and government agencies.

If the property is sold within the first six years, the seller must pay back part of the credit. The "recapture rule" covering such sales or rehabilitated buildings is as follows:

Years of Disposition

Recapture Percentage

One full year after placed in service.	100%
2nd year	80%
3rd year	60%
4th year	40%
5th year	20%

9. Historic Preservation Assistance - Provides funding for the acquisition and restoration of historically significant structures. Funding is in the form of direct grants (up to 50% of allowable project costs). Funds are appropriated through the U.S. Department of the Interior and dispersed through states, which then transfer funds to individuals, public or private organizations.

Eligible activities include: Acquisition, protection, preservation, rehabilitation, restoration or reconstruction of properties listed in the National Register of Historic Places.

Properties must be listed in the National Register of Historic Places through the State Historic Preservation Office. Work must be completed in accordance with standards set by the Secretary of the Interior for historic preservation projects. Property owners must agree not to alter the property for an agreed-upon number of years. Unless visible from a public way, the property must be open to public view at least 12 days per year.

10. Federal National Mortgage Association -

Objective: To provide more funds for mortgages and to provide mortgages at below market interest rates.

Form of Funding: The Federal National Mortgage Association (FNMA) or "Fannie Mae" is a federally-chartered, shareholder-owner corporation. FNMA purchases mortgage loans from local lenders, thereby replenishing the mortgage money supply of these institutions. In addition to its conventional loan purchase program. FNMA has four special programs of interest to community development efforts:

- o Loan participation plan: FNMA purchases 60 to 90 percent participation interests in pools of conventional mortgages in one- to four- unit residential buildings in credit-short neighborhoods. There is no dollar maximum on the pools, but the minimum is \$250,000. Any federally-insured lender may sell participations to FNMA.

- o Rehabilitation loans: FNMA buys mortgages on existing one to four- unit residential properties in need of repair. The loan amount is then placed in an interest-bearing escrow account to be drawn upon as repair work progresses.
- o Loans on the security of mortgage program: FNMA provides one-year loans to lenders supervised by federal or state agencies to secure residential mortgages. The loan amount may be up to 90 percent of the value of the security, and the funds may be reinvested in urban real estate loans for residential, commercial, or industrial properties.
- o Municipal tri-party participation program: Under this program Fannie Mae, an eligible lender, and a third party such as local government agency, builder, corporation, or private foundation jointly finance mortgages that the eligible lender originates. This tri-part combination enables lenders to offer mortgages at substantially reduced interest rates.

STATE SOURCES

A. Loan Programs¹

1. California Housing Financing Agency (CHFA); Rental Housing Construction Program - Provides loans for development of new rental units by private, non-profit, or public agency sponsors. Not less than 30% of the units in each development assisted under the program are to be made available to households of low income remaining units may be made available to moderate income households.
2. Demonstration Housing Rehabilitation Program - Provides deferred payment loans for acquisition and rehabilitation of existing rental housing for the elderly, or handicapped, or for low income families.
3. Urban/Rural Predevelopment Loan Program - Provides loans to local governmental agencies, nonprofit organizations, and cooperative housing corporations for preliminary costs of developing assisted housing for low income families and elderly or handicapped persons in rural and urban areas. Authorized costs include site acquisition and preparation; architectural, engineering, legal, permit, and application fees; and bonding expenses. Loans are not available for construction financing or administrative costs.
4. Homeownership Assistance Program (HCD) - Provides up to 49% of purchase price of dwelling unit in the form of mortgage participation with an institutional lender to enable purchase of housing. Balance of financing comes from private or from other

¹California Department of Housing and Community Development.

public lending institutions. Assists purchase of (1) units after a condominium conversion; (2) mobilehome park spaces or parks; (3) mobilehome units. Upon sale of the unit, the state will share in the sales proceeds in an amount proportionate to its original investment.

B. Housing Bond Programs²

1. Marks-Foran Residential Rehabilitation Act - Bonds provide financing for rehabilitation of existing residences or for residential infill construction. Terms require that the units funded be made available for low and moderate income persons for at least 30 years.
2. SB 99 - Provides financing for mortgages and construction loans within the City. The intent of this bill is to upgrade and encourage investment in redevelopment areas; to increase urban employment and improve the urban tax base. Housing for low and moderate income persons is not a primary purpose.
3. Cal Vet Farm and Home Loans - Bonds create the funding necessary for the purchase of homes or farms by California veterans at low interest rates.

C. Housing Related Tax Benefits¹

1. Senior Citizen Renters Tax Assistance - Persons 62 years or older with annual incomes of \$12,000 or less qualify for a maximum of \$240 per year.
2. Senior Citizen Property Tax Postponement - Provides for the deferment of all or part of one year's property tax with 7% interest until property is sold or at owner's death. Claimants must be at least 62 years old; earn a maximum of \$30,000 per year; and have a minimum of 20% equity in the home. (Average postponement = \$561 (1980-81)).
3. Senior Citizen Property Tax Assistance - Eliminates 96% of property tax liability on the 1st \$34,000 of assessed value. Claimants must be 62 years old or disabled and earn a maximum of \$12,000 per year.
4. Renters Tax Relief - All California renters are eligible if renting by March 1. Provides \$60 per individual and \$137 per couple per year.
5. Homeowners Property Tax Relief - All California homeowners eligible if principle residence owned by March 1. Exempts from taxation the first \$7,000 of full value of home. (Average benefit = \$80/yr (1980-81)).

¹California Department of Housing and Community Development.

²Legislative Analyst, Franchise Tax Board, Assembly Revenue and Taxation Committee.

6. Alternative Energy Tax Credit - Provides an income tax credit for homeowners installing solar energy and related conservation measures. Income tax credit = 55% of cost up to \$3,000 on single-family dwellings. (Average credit = \$558 1980-81).
7. Home Mortgage Interest Deduction - All California homeowners can deduct all interest paid on a home mortgage. (Average benefit = \$242 per return, 1979).

POTENTIAL LOCAL SOURCES

1. Bond Issue - Financing for housing projects could be provided by Revenue Bonds or General Obligation Bonds. Revenue Bonds are backed by the revenues from the project being financed, and by reserve funds set up at the time of issuance. Revenue bonds are traditionally used to finance low income housing. General Obligation Bonds are often too cumbersome for use in financing housing since they are often accompanied by a property tax increase and require a two-thirds voter approval.
2. Utility Fund Financing - Revenues from the Utility Fund could be used as a source of low interest loans for construction and rehabilitation of housing units.
3. Carry-Over Funds - Funds in the General Fund could be used for loans and grants for new construction and rehabilitation.
4. Capital Improvement Fund - Dollars in the Capital Improvement Fund could be reserved for rehabilitation or low interest loans.
5. Public Employees Fund - Use public employees pension and retirement funds for the housing program.

APPENDIX B POPULATION CHARACTERISTICS MATRIX

	42.01	42.02	43.02	43.03	43.04	44.00	45.00	LODI TOTAL
NO. PERSONS PER CENSUS TRACT	6,166	7,143	5,504	3,221	4,607	5,088	3,489	35,221
MEDIAN AGE	33.9	39.1	47.5	34.8	26.1	28.5	33.8	33.6
RACE % White % Non-white	94.3% 5.7%	93.2% 6.8%	93% 7%	93% 7%	90% 10%	84% 16%	81% 19%	90.3% 9.7%
PERSONS PER UNIT (MEDIAN)	2.4	2.07	2.03	2.73	2.38	2.11	1.84	2.17
MEDIAN FAM. INCOME	\$22,131	\$22,089	\$19,728	\$28,278	\$20,527	\$12,009	\$14,000	\$19,843
% ELDERLY (62 Yrs/Older)	13.9%	23%	31.4%	9.6%	7.9%	18%	24%	18.9%
SPANISH ORIGIN	6.5%	6.7%	7.6%	3.4%	8.6%	21%	17.9%	10%
% FEMALE HEADS OF HOUSEHOLDS	10.5%	10.7%	12%	4%	10.6%	19.4%	13.1%	12.2%
% VERY LOW INCOME FAM.	13.3%	20%	21%	6.3%	12%	40%	35%	21%
% LOW INCOME FAMILIES	16%	13%	12%	7.2 %	15%	20%	19%	30%

APPENDIX C HOUSING CHARACTERISTICS MATRIX

HOUSING	42.01	42.02	43.02	43.03	43.04	44.00	45.00	LODI TOTAL
MEDIAN VALUE HOUSING UNITS	\$61,400	\$61,300	\$56,800	\$81,500	\$74,700	\$39,500	\$41,500	\$60,500
% OVERCROWDED UNITS	2.3%	2.0%	1.8%	.91%	4.3%	7.7%	5.9%	3.5%
TENURE-OWNER OCC'D RENTER-OCCUPIED	73% 25%	60% 35%	60% 36%	86% 10%	42% 49%	40% 53%	39% 54%	56% 38.4%
VACANCY RATE	2.3%	5.4%	3.2%	3.6%	9.1%	6.8%	7.1%	5.3%
% OVERCROWDED UNITS	2.3%	2.0%	1.8%	0.92%	4.3%	7.7%	5.9%	3.5%
% UNITS W/INADE- QUATE PLUMBING	0.13%	0.89%	0.17%	-	0.58%	0.9%	3.4%	0.84%
% UNITS OVER 30 YRS. OLD.	31%	67.3%	68.5%	8%	8%	69.6%	62%	49.4%

APPENDIX D 1980 HOUSING COSTS

	42.01	42.02	43.02	43.03	43.04	44.00	45.00	LODI	S. J. CO.
MEDIAN HOUSING VALUE	\$66,400	\$61,300	\$56,800	\$81,500	\$74,700	\$39,500	\$41,500	\$60,500	\$54,500
MEDIAN MONTHLY MORTGAGE PAYMENTS (owner-specified)	\$ 294	\$ 344	\$ 248	\$ 389	\$ 440	\$ 243	\$ 349	\$ 330	\$ 340
MONTHLY NET INCOME NECESSARY TO AFFORD A HOME (25%)	\$ 1,176	\$ 1,376	\$ 992	\$ 1,556	\$ 1,760	\$ 972	\$ 1,396	\$ 1,320	\$ 1,360
MEDIAN GROSS MONTHLY RENT (renter specified)	\$ 292	\$ 214	\$ 226	\$ 249	\$ 271	\$ 214	\$ 189	\$ 227	\$ 223
MONTHLY NET INCOME NECESSARY TO AVOID PAYING OVER 25% OF INCOME ON HOUSING	\$ 1,168	\$ 856	\$ 904	\$ 996	\$ 1,084	\$ 856	\$ 756	\$ 908	\$ 892
MEDIAN MONTHLY HOUSEHOLD INCOME (1980 Census)	\$ 1,692	\$ 1,410	\$ 1,291	\$ 2,262	\$ 1,514	\$ 841	\$ 836	\$ 1,336	\$ 1,340

SOURCE: 1980 U.S. CENSUS

APPENDIX E

CALIFORNIA STATE LAW PERTAINING TO DENSITY BONUSES AND OTHER INCENTIVES

California Government Code; Chapter 4.3, Section 65915. When a developer of housing agrees to construct at least 25 percent of the total units of a housing development for persons and families of low or moderate income, as defined by Section 50093 of the Health and Safety Code, a city, county, or city and county shall enter into an agreement with the developer to either grant a density bonus or provide not less than two other bonus incentives for the project.

For the purposes of this chapter, "density bonus" means a density increase of at least 25 percent over the otherwise allowable density. The density bonus shall apply to housing developments consisting of five or more dwelling units. Other bonus incentive which a city, county or city and county may agree to provide under this section include the following:

- a) Exemption of the development from the requirements of Section 66477 and any local ordinance adopted pursuant thereto.
- b) Construction of public improvements appurtenant to the proposed housing development, which may include, but shall not be limited to, streets, sewers and sidewalks.
- c) Utilization of federal or state grant moneys or local revenues to provide the land on which the housing development will be constructed at a reduced cost.
- d) Exemption of the development from any provision of local ordinances which may cause an indirect increase in the cost of the housing units to be developed.

Nothing in this section shall preclude a city, county, or city and county from taking any additional actions which will aid housing developers to construct housing developments with 25 percent or more of the total units of a housing development for persons and families of low or moderate income. The determination of the means by which a city, county, or city and county will comply with this chapter shall be in the sole discretion of the city, county, or city and county; provided, that no developer shall be required to enter into an unacceptable agreement as a prerequisite to approval of a housing development. (Added by Stats. 1979, Ch. 1207).

APPENDIX E
ASSISTED HOUSING UNITS THROUGH 3/79

TYPES OF ASSISTANCE	42.01	42.02	43.02	43.03	43.04	44.00	45.00	TOTAL
SECTION 8 (Single Family)							1	1
FHA- INTEREST CREDIT (Single-Family)		1						1
SECTION 221d-4 (Multi-Family)	30	26						56
SECTION 236 (Multi-Family)			28		39			67
TOTAL ASSISTED (Single-Family)		1		0	0	0	1	2
TOTAL ASSISTED (Multi-Family)	30	26	28	0	39	0	0	123
GRAND TOTAL	30	27	28	0	39	0	1	125

SOURCE: S.J. COUNTY HOUSING ELEMENT

APPENDIX G

MANUFACTURED HOUSING

Manufactured housing can play a major role in the provision of affordable housing for low and moderate income households. Major changes in State law which became effective July 1, 1981 have eliminated a city's ability to prevent the installation of mobile homes on foundation systems on lots zoned for single-family dwellings.

Section 65852.3 of the California Government Code essentially sanctioned all mobile homes certified under the National Mobile Home Construction and Safety Standards Act of 1974. In addition, a city may not impose conditions above and beyond those conditions normally applied to traditional site-built structures.

Although many questions concerning this legislation are still to be resolved in the courts, it is felt that the intention of the Legislature in passing this bill is consistent with Section 50003(b) of the Health and Safety Code which states the following:

"The Legislature...recognizes the need to provide assistance to persons and families of low and moderate income households to purchase manufactured housing and to cooperatively own the mobile home parks in which they reside and the need to increase the supply of manufactured housing of low and moderate income and very low income households."

Mobile homes are the product of assembly line methods and are built to approved plans that eliminate the inefficiencies in building site-built homes, thus, the reduction in construction costs.

In 1974, the U.S. Congress enacted the Mobile Home Construction and Safety Standard Act. The Act provided for uniform standards and a strict enforcement policy. All manufactured homes built after 1974 must comply with these standards, and, as a result, meet or exceed the building standards for site-built homes.

Over the years mobile home exteriors have changed to more closely resemble traditional homes. Changes are continuing to be made in the mobile home industry in response to consumer demand. As a result, the role of manufactured housing in providing affordable housing will become more important in the City of Lodi.

APPENDIX H

ASSESSMENT OF HOUSING CONDITION - 1978

The 1978 Housing Condition Survey was conducted by means of a visual, exterior survey of all residential structures in the community. Units were evaluated by the Lodi Planning staff in terms of the structural condition of the living unit, the condition of any detached accessory buildings and the overall maintenance of the lot. Structural defects in roofs, walls, foundation, porch, steps, windows, doors and sills, and paint were noted. One of the following ratings was assigned to each structure:

1. Sound
2. Slightly deteriorated
3. Deteriorated
4. Dilapidated

STRUCTURAL-CONDITION SURVEY

ADDRESS: _____ DATE: _____ BY: _____
 TYPE OF CONSTRUCTION: () WOOD () STEEL BLDG. #: 1 2 3 4 5 6 7 8 H A POT
 () BRICK () BRICK NUMBER OF STORIES: /
 () STUCCO () CONCRETE

1. FOUNDATION: () BRICK () BRICK () CONCRETE
 () CRACKED () NON CONT. FOUNDATION
 () GEN. DET. DETERIORATION () NO FOUND.
 2. WALLS: () GENERAL DETERIORATION
 () CRACKED
 () SITUATION
 3. ROOF: () DETERIORATING CHIMNEY
 () SHINGLES OR SHAKES MISSING
 () TRAMPERS COVERING CRACKED OR TORN
 () SLIGHT SAG () MAJOR SAG
 () GUTTERS & DOWNSPOUTS NEED REPAIR

4. DOORS & WINDOWS:
 () GLASS BROKEN
 () SAG
 () NEED REPAIR
 5. (1) STAIRS; (2) PORCHES;
 (3) RAILINGS
 1 2 3 Slight weathering/peel; slight
 sag; variation rise & run
 1 2 3 Dilapidated; considerable sag
 6. BUILDING CONDITION:
 General Comments: _____

PARKING, DRIVE, & YARD AREAS:

1. RESIDENTIAL PARKING: () APARTMENT
 () LACKS REQUIRED OFF-STREET PARKING SPACES
 () STORED IN PUBLIC VIEW () NOT ON PARKING AREAS
 () CAR () CAR PARTS () TRAILER () BOAT
 () MOTORCYCLE () CAMPER TOTS
 () STORED IN FRONTYARD; () SIDELYARD; () ON ALLEY
 Comments: _____

- ACCESSORY STRUCTURES:
 () SLIGHTLY DETERIORATING 1,2
 () DETERIORATING 3,4
 () DILAPIDATED 5+
 Comments: _____

- COMMERCIAL PARKING: () APARTMENT
 () DETERIORATING PAVED AREA () DET. STRIPING
 () LACK OF PAVING () DEFICIENT STALL SIZE
 () DETERIORATING BUMPER STRIPS () MISSING BUMPER STRIPS
 () CIRCULATION HAZARD
 Comments: _____

2. FENCES: WALLS:
 () SLIGHTLY DETERIORATING () SLIGHTLY DET.
 () DETERIORATING () DETERIORATING
 () DILAPIDATED () DILAPIDATED
 3. DRIVEWAYS: WALKS:
 () SLIGHTLY DETERIORATING () SLIGHTLY DET.
 () DETERIORATING () DETERIORATING
 () DILAPIDATED () DILAPIDATED.
 4. VISUAL CIRCULATION HAZARD ()
 HEDGES () TREE () OTHER ()
 Comments: _____

- SENSORY BLIGHT:
 On-site Off-site
 () () ODOUR
 () () HUMIDITY
 () () CLARE
 () () NOISE
 () () DUST
 () () VIBRATION
 () () VIBRATION
 () () AIRBORN PESTICIDES
 () () TRASH
 () () OIL
 Specify: _____
 Comment: _____

5. JUNK AND OPEN STORAGE:
 () ACCUMULATED JUNK () VISIBLE OPEN STORAGE
 () FIRE HAZARD () HEALTH HAZARD (garbage or vermin)
 Comments: _____

6. VEGETATION & LANDSCAPING:
 () DEFICIENT, LACK OF MAINTENANCE
 () FIRE HAZARD
 Comments: _____

- PUBLIC SIDEWALKS:
 () JUMP CURB () NO GUTTER
 () NO SIDEWALK
 () SLIGHT DETERIORATION; BUCKLE
 () MISSING RAILINGS
 () CONSIDERABLE DETERIORATION
 OR PUBLIC INTERFERENCE IN
 PLACEMENT NEEDED
 Comments: _____

- STREET & ALLEY LIGHTING:
 () UNUSUAL LIGHTING
 COMMENTS: _____

APPENDIX I

HOUSING QUALITY STANDARDS

U.S. Department of Housing and
Urban Development

The City of Lodi will recognize any structure as substandard which does not meet HUD's Section 8 existing housing quality standards as listed below:

1. Sanitary facilities.

Each dwelling unit shall include its own sanitary facilities which are in proper operating condition; can be used in privacy and are adequate for personal cleanliness and the disposal of human waste. A flush toilet in a separate private room, a fixed basin with hot and cold running water, and a shower or tub with hot and cold running water shall be present in the dwelling unit all in proper operating condition. These facilities shall utilize an approved public or private disposal system.

2. Food Preparation and Refuse Disposal.

The dwelling unit shall contain suitable space and equipment to store, prepare, and serve foods in a sanitary manner. There shall be adequate facilities and services for the sanitary disposal of food waste and refuse including facilities for temporary storage where necessary. The unit shall contain the following equipment and proper operating condition: Cooking stove or range and a refrigerator of appropriate size for the unit supplied by either the owner or the family, and a kitchen sink with hot and cold running water. The sink shall drain into an approved public or private system. Adequate space for the storage, preparation and serving of foods shall be provided. There shall be adequate facilities and services for the sanitary disposal of food waste and refuse including facilities for temporary storage where necessary, e.g. garbage cans.

3. Space and Security

The dwelling unit shall afford the family adequate space and security. A living room, kitchen area and bathroom shall be present, and the dwelling unit shall contain at least one sleeping living-sleeping room of appropriate size for each two persons. Exterior doors and windows accessible from outside the unit shall be lockable.

4. Thermal Environment

The dwelling unit shall have, and be capable of maintaining, a thermal environment healthy for the human body. The dwelling unit shall contain safe heating and/or cooling facilities which are in proper operating condition and can provide adequate heat

and/or cooling to each room in the dwelling unit appropriate for the climate to assure healthy living environment. Unvented living room heaters which burn gas, oil or kerosene are unacceptable.

5. Illumination and Electricity

Each room shall have adequate natural or artificial illumination to permit normal indoor activities and to support the health and safety of occupants. Sufficient electrical sources shall be provided to permit use of essential electrical appliances while assuring safety from fire. Living and sleeping rooms shall include at least one window. A ceiling or wall-type light fixture shall be present and working in the bathroom and kitchen area. At least two electrical outlets, one of which may be an overhead light, shall be present and operable in the living area, kitchen area, and each bedroom area.

6. Structure and Materials

The dwelling unit shall be structurally sound so as not to pose any threat to the health and safety of the occupants and so to protect the occupants from the environment. Ceiling, walls and floors shall not have any serious defects such as severe bulging and/or leaning, large holes, loose surface materials, severe buckling or noticeable movement under walking stress, missing parts or other serious damage. The roof shall be firm and the roof shall be weathertight. The exterior wall structure and exterior wall surface shall not have any serious defects, such as serious leaning, buckling, sagging, cracks or holes, loose siding, or other serious damage. The condition and equipment of exterior and interior stairways, halls, porches, walkways, etc., shall be such as to not present a danger of tripping or falling. Elevators shall be maintained in a safe and operable condition. In the case of a mobilehome, the home shall be securely anchored by a tie-down device which distributes and transfers the loads imposed by the unit to appropriate ground anchors so as to resist wind overturning and sliding.

7. Interior Air Quality

The dwelling unit shall be free of pollutants in the air at levels which threaten the health of the occupants. The dwelling unit shall be free from dangerous levels of air pollution from carbon monoxide, sewer gas, fuel gas, dust and other harmful air pollutants. Air circulation shall be adequate throughout the unit. Bathroom areas shall have at least one openable window or other adequate exhaust ventilation.

8. Water Supply

The water supply shall be free from contamination. The unit shall be served by an approved public or private sanitary water supply.

9. Lead-based Paint

The dwelling unit shall be in compliance with HUD Lead-based Paint regulations.

10. Access

The dwelling unit shall be usable and capable of being maintained without unauthorized use of other private properties, and the building shall provide an alternate means of egress in case of fire.

11. Sight and Neighborhood

The sight and neighborhood shall be reasonably free from disturbing noises and reverberations from other houses to the health, safety and general welfare of the occupants. The sight and neighborhood shall not be subject to serious adverse environmental conditions, natural or manmade, such as dangerous walks, steps, instability, flooding, poor drainage, septic tank backups, sewage hazards or mudslides, abnormal air pollution, smoke or dust, excessive noise, vibration or vehicular traffic, excessive accumulation of trash, vermin or rodent infestation or fire hazards.

12. Sanitary Conditions

The unit and its equipment shall be in a sanitary condition. The unit and its equipment shall be free from vermin and rodent infestation.

GLOSSARY OF TERMS

Census Tract: Census tracts are small, relatively permanent areas into which large cities and adjacent areas are divided for the purpose of providing comparable small area statistics. Tract boundaries are determined by a local committee and approved by the Census Bureau. They conform to county lines. Tracts are originally designed to be relatively homogeneous with respect to population characteristics, economic status and living conditions.

Contact Rent: Refers to the monthly dollar rent agreed upon or the monthly dollar rent asked at the time of enumeration, regardless of any furnishings, utilities, or services that were included.

Deteriorated Condition: Deteriorating units have one or more defects such as several broken or missing window panes, a shakey or unsafe porch etc.

Dilapidated Conditions: Units are classified as dilapidated if they do not provide adequate shelter and in their present conditions, endanger the health and safety of their inhabitants. They might have such defects as holes, open cracks, etc. over a large area of the foundation or walls, or they may have substantial sagging of floors and roof.

Dwelling Unit: Dwelling units include houses, apartments, groups of rooms or single rooms which are occupied or vacant but intended for occupancy as separate living quarters. Specifically, there is a dwelling unit when the occupants live and eat separately from any other persons in the structure and their is either:

1. Direct access to the unit from the outside or through a common hall, or
2. Complete kitchen facilities for the occupant's exclusive use.

Excessive Payment: The Federal Government has determined that a household that is spending over 25% of its monthly income is making an excessive payment for housing.

Family: Two or more persons living in the same household who are related by blood, marriage or adoption.

Gross: Gross rent is calculated for renter-occupied units rented for cash rent. It represents the contract rent plus the average monthly cost of utilities.

Gross Rent as a Percentage of Income: (Rent/Income Ratio) - Refers to the yearly gross rent expressed as a percentage of the total income reported by the family or primary individual for the preceding year.

Head of Household: The one person in each household is designated as the "head", that is, the person who was reported as the head by the members of the household.

Household: All persons occupying a single housing unit. Average population per household is calculated as the total population in households divided by the total number of households.

Housing Unit: See Dwelling Unit.

Income from Social Security: Includes U. S. Government payments to retired persons, dependents of deceased insured workers, or disabled workers; but excludes medicare reimbursements.

Low Income Groups. Those person(s) with annual incomes not exceeding 80% of the 1980 San Joaquin median income of \$19,120 (i.e. persons with an annual percent of the San Joaquin County median, which, in 1980, was under income of \$15,295, or less, would be classified as low income groups.

Mean Income: The average amount of income earned by adding together all incomes of individuals and dividing by the number of individuals earning those incomes.

Median Income: Is the amount which divides the income distribution into two equal groups, one having incomes above the median, and the other having incomes below the median.

Other: Referring to racial background, includes individuals of American Indian, Japanese, Chinese, Filipino, Hawaiian, Korean descent, and all others not reported as specific ethnic type.

Overcrowding: Overcrowding rates are determined by the number of persons per room, calculated by dividing the number of persons by the number of rooms in each unit. Overcrowded units are those units containing 1.01 to 1.50 persons per room. Severely overcrowded units are those units containing 1.50 or more persons per room.

Poverty Level: National poverty level classification for those households earning incomes below the poverty index which takes into account factors such as family size and number of children. In 1980, the poverty threshold for all non-farm persons was:

All unrelated individuals: \$3,689

All families:

2 persons \$ 4,725

3 persons \$ 5,784

4 persons \$ 7,412

5 persons \$ 8,775

6 persons \$ 9,914

7 or more \$12,280

Residential Holding Capacity: The ability of an area of land to accommodate an increase in population and dwelling units, associated with future growth.

Sound Condition: Housing units are classified as sound if they have no visible defects, or only slight defects that are normally corrected during the course of regular maintenance.

Spanish Origin: A person of Mexican, Puerto Rican, Cuban, Central or South American or other Spanish culture or origin, regardless of race.

Standard Metropolitan Statistical Area (SMSA): The concept of an SMSA has been developed in order to present general purpose statistics. Generally speaking, an SMAS consists of a county or group of counties containing at least one city having a population of 50,000 or more plus adjacent counties which are metropolitan in character, and are economically and socially integrated within the central city.

Structure: A separate building that is either surrounded by open space on all four sides (detached) or is separated by dividing walls that extend from the ground to the roof (attached).

Substandard Housing: For purposes of this element, housing classified as substandard refers to units lacking proper maintenances, and/or that has been designated as deteriorating or dilapidated.

Target Area/Groups: Block groupings within a city utilized as a basis for analysis of certain population and/or housing characteristics. Target areas are also useful in concentrating programs and other activities in order to alleviate the housing problems of a specific area.

Tenure: Refers to occupancy status of dwelling units; owner or renter occupied.

Units in Structure: Housing units are classified by the number of units in the structure in which they are located.

Unrelated Individuals: Persons not living with relatives but living in a household entirely along or with one or more persons not related to him, or living in group quarters (except inmates of institutions).

Vacancy Rates: Vacancy rates are calculated as the number of vacant units as a percentage of the total housing unit inventory.

Very Low Income: Those persons earning annual incomes that are less than fifty percent of the county median, which in 1980, was \$9,560.

Environmental Assessment

INITIAL STUDY

1. PROJECT TITLE CITY OF LODI HOUSING ELEMENT (File No. ND-83-2)
2. LOCATION CITY OF LODI, SAN JOAQUIN COUNTY, CALIFORNIA
3. PROJECT DESCRIPTION The City of Lodi Housing Element is a document to provide a statement of City policy concerning housing and specific implementation measures necessary to accomplish designated housing goals.
4. General Plan Designation (A) Existing (city), (B) Proposed The project Housing Element is an element to the City's General Plan.
5. Site description and surrounding land use The Housing Element covers the entire residential areas of the City of Lodi.
6. Zoning (A) Existing, (B) Proposed All residential zones.

Will the Project Have a Significant Effect Through Any of the Following Impacts?

	<u>Yes</u>	<u>No</u>	<u>Maybe</u>
7. a. Substantial alteration of natural topography, soil or subsoil features.....	___	<u>X</u>	___
b. Substantially degrade surface or groundwater quality..	___	<u>X</u>	___
c. Substantially deplete surface or groundwater resources.....	___	<u>X</u>	___
d. Substantially interfere with groundwater flow or recharge.....	___	<u>X</u>	___
e. Cause a significant affect related to flood, erosion or siltation.....	___	<u>X</u>	___
f. Substantial interference with the habitat of any species of fish, wildlife or plant.....	___	<u>X</u>	___
g. Violate ambient air quality standards or create substantial air emissions or objectionable odors.....	___	<u>X</u>	___
h. Substantially increase ambient noise or glare level for adjoining areas.....	___	<u>X</u>	___
i. Substantial reduction of existing cropland.....	___	<u>X</u>	___
j. Expose individuals or property to geologic, public health, traffic, flood, seismic or other hazards.....	___	<u>X</u>	___

NEGATIVE DECLARATION

Notice is hereby given that the City of Lodi Planning Department has determined that the following proposal will have no "Significant Impact on the Environment". Supporting documentation is available in the form of a "Preliminary Environmental Assessment" and is available for public review in the Planning Department Office, City Hall Building, 221 W. Pine Street. Anyone wishing to appeal the issuance of this Declaration to the Planning Commission may do so no later than the date indicated as "Last date to Appeal".

Date April 11, 1983 Project Title: CITY OF LODI HOUSING ELEMENT
ND-83-2

Responsible Agency: Lodi Planning Dept. Contact Person: GAYE PAPAIS

NAME OF PERSON, FIRM, OR AGENCY UNDERTAKING PROJECT:
CITY OF LODI COMMUNITY DEVELOPMENT DEPARTMENT

Address: 221 WEST PINE STREET City: LODI

Area Code: (209) Phone: 334-5015 EXT 257

PROJECT DESCRIPTION OF NATURE, PURPOSE, AND LOCATION

THE CITY OF LODI IS ADOPTING A HOUSING ELEMENT IN CONFORMANCE WITH STATE AND FEDERAL REQUIREMENTS. THE ELEMENT IS INTENDED TO PROVIDE A STATEMENT OF CITY POLICY CONCERNING HOUSING AND THE SPECIFIC IMPLEMENTATION MEASURES NECESSARY TO ACCOMPLISH DESIGNATED HOUSING GOALS. THE HOUSING ELEMENT COVERS THE AREA WITHIN THE CITY OF LODI GENERAL PLAN.

Project Location City
LODI

Project Location County
SAN JOAQUIN COUNTY

Last Date to Appeal:
MAY 13, 1983

Address Where Preliminary Environment Assessment is Available:
LODI CITY PLANNING DEPT.
221 W. Pine St., Lodi, CA 95240
Phone: (209) 334-5634

FILED
1983 APR 18 AM 9:14
RALPH W. LIPPERSON, CLERK
BY JUDITH H. BROWN
CITY OF LODI
PLANNING DEPARTMENT

	Yes	No	Maybe
k. Have a substantial, demonstrable, negative aesthetic effect.....	___	<u>X</u>	___
l. Result in the disruption or alteration of an archeological, historical or paleontological site....	___	<u>X</u>	___
m. Cause or allow substantial increase in consumption in any natural resources.....	___	<u>X</u>	___
n. Results in the use or waste of substantial amounts of fuel or energy.....	___	<u>X</u>	___
o. Necessitate major extensions of water, sewer, storm drain, electrical lines or public roads.....	___	<u>X</u>	___
p. Substantially increase demand for or utilization of public services such as schools or fire or police protection.....	___	<u>X</u>	___
q. Substantially change transportation patterns related to existing traffic load, street capacity, parking availability or traffic safety.....	___	<u>X</u>	___
r. Induce substantial growth, concentration or displacement of population.....	___	<u>X</u>	___
s. Result in an alteration or conflict with existing or planned land uses.....	___	<u>X</u>	___
t. Conflict with adopted plans, goals or policies of the City of Lodi.....	___	<u>X</u>	___

Adverse Impacts of project and their magnitude: The City determines that
the project will have no significant environmental impacts.

Mitigation Measures to Reduce Adverse Impacts Identified by Initial Study: _____

RECOMMENDATION

X Negative Declaration ___ EIR ___ Conditional Negative Declaration

JAMES B. SCHROEDER
 Environmental Review Officer

James B. Schroeder

Date 4/11/83

HOUSING ELEMENT PARTICIPANTS

CITY COUNCIL

Evelyn Olson, Mayor
Robert Murphy
James Pinkerton
Fred Reid
Randy Snider

PLANNING COMMISSION

A. Fred Baker, Chairman
Susan Hitchcock-Akin
Lee Ekstrom
Joanne Hoffman
Jeffrey Kirst
Michael A. Lapenta
Harry Marzolf

STAFF PARTICIPANTS

Gaye Papais, Project Coordinator
James B. Schroeder, Director, Community
Development Department
Henry Graves, City Manager
Ronald Stein, City Attorney
Mary Joan Starr, Former Staff Member
Richard Prima, Associate Civil Engineer
Barbara Baber, Word Processing Specialist
Christopher Mark White, Drafting Aide