

Mandatory Inclusionary Zoning

Location/ Population	Trigger	Set-Aside	Income	Length	Alternatives	Incentives	Other	Results
Boston, MA -2000 589,141	10 units	10%	<80% AMI (1/2 units) <80-120% AMI (1/2 units)	Maximum legally allowed	<ul style="list-style-type: none"> ▪ Fee In-Lieu ▪ Off-Site Units: 15% 	<ul style="list-style-type: none"> ▪ None except – Increased height and FAR only in financial district 		246 affordable units created \$1.8 million funds generated 2004
Boulder, CO (1980; 1999) 99,093	1 unit	20%	<80% AMI	Permanent	<ul style="list-style-type: none"> ▪ Fee In-Lieu ▪ Land Dedication ▪ Dedicate Existing Units ▪ Off-Site Units ▪ <i>Must construct 1/2 of required units</i> 	None		56 affordable units created (2003)
Cambridge, MA (1998) 101,355	10 units	15%	<65% AMI (10-30% AMI using additional resources)	Permanent	None	<ul style="list-style-type: none"> ▪ 30% Density Bonus (1/2 market, 1/2 affordable) 	<ul style="list-style-type: none"> ▪ Incentive Zoning (1988) <i>If nonresidential developers needed special permit contribute to affordable housing trust</i> ▪ <i>Half of units go to housing choice vouchers recipients</i> 	141 affordable units created (2004)
Chapel Hill, NC 49,368	5 units	15% (rental) 15% (owner)	<80% AMI		<ul style="list-style-type: none"> ▪ Fee in lieu 			
Davis, CA -1990 60,308	5 units	10%	<50% AMI (2/7 units) 50-80% AMI (5/7 units)	Permanent	<ul style="list-style-type: none"> ▪ <i>If developer proves hardship</i> ▪ Land Dedication 	<ul style="list-style-type: none"> ▪ 25% Density Bonus 	<ul style="list-style-type: none"> ▪ Through land dedication, an alternative to developing on-site, nonprofit developers have made 1,500 affordable units since 1987 	

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Denver, CO -2002 554,636	30 units	10% (<i>for-sale</i>) 10% (<i>rental voluntary</i>)	<80% AMI (<3 stories) <95% AMI (4+ stories) <65% AMI (<i>rentals</i>)	15 yrs	<ul style="list-style-type: none"> ▪ Fee In-Lieu: 50% price per unbuilt unit ▪ Off-Site Units 	<ul style="list-style-type: none"> ▪ 20% Density Bonus (<i>single family</i>) ▪ 10% Density Bonus (<i>multi-family</i>) ▪ \$5,000/for-sale unit (<i>up to 1/2 of all units</i>) ▪ \$10,000/rental unit (<i>to <50% AMI</i>) ▪ Expedited review ▪ Reduced parking requirements 	<ul style="list-style-type: none"> ▪ Zoning applies to both new developments and renovations 	3,395 affordable units created (2004)
Fairfax County, VA -1990 969,749	50 units	6.25-12.5%	<50% AMI (<i>1/3 rentals</i>) <70% AMI (<i>2/3 rentals</i>) <70% AMI (<i>Own</i>) (<i>25-40% AMI using additional resources</i>)	15 yrs (own) 20 yrs (rent) 50 yrs (prior to 1998)	<ul style="list-style-type: none"> ▪ <i>Under certain circumstances</i> 	<ul style="list-style-type: none"> ▪ 20% Density Bonus 	<ul style="list-style-type: none"> ▪ Recertify applicable renters annually ▪ First-time homebuyer mortgage assistance ▪ 1/2 of units offered to Housing Authority 	1/3 of the units go to <40% AMI
Highland Park, IL- 2003 31,365		20%	<65% AMI (<i>50% own</i>) <50% AMI (<i>33% rental</i>) <45% AMI (<i>33% rental</i>) <51%-80% AMI 33% rental	25 yrs	<ul style="list-style-type: none"> ▪ Off-site units ▪ Fee in Lieu ▪ Dedication of land 	<ul style="list-style-type: none"> ▪ Development cost off-sets ▪ Density Bonus ▪ PUD Discretionary Bonus 	<ul style="list-style-type: none"> ▪ Fixed rate 30 yr mortgage ▪ Down payment 5% purchase price 	
Irvine, CA		15%	45% AMI (<i>33% rental</i>)	30 yrs	<ul style="list-style-type: none"> ▪ Fee in lieu ▪ Off-site units 		<ul style="list-style-type: none"> ▪ Annual gap study 	

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Morgan Hill, CA		20% for low income or 10% for very low income or 50% for senior citizens		30 yrs		<ul style="list-style-type: none"> ▪ 25% Density Bonus 		
Pleasanton, CA 67,724		15-20%			<ul style="list-style-type: none"> ▪ Off-site units ▪ Land Dedication ▪ Credit Transfers ▪ Alternate Methods of Compliance ▪ Lower Income Housing Fee ▪ Option 	<ul style="list-style-type: none"> ▪ Fee Waiver or Deferral ▪ Design Modifications ▪ Second Mortgages ▪ Priority Processing 		
Sacramento, CA (2000) 407,018	9 units	15%	<50% AMI (2/3 units) 50-80% AMI (1/3 units)	30 yrs	<ul style="list-style-type: none"> ▪ Off-site: ▪ <i>If insufficient land on-site and new units are in "new growth" areas</i> 	<ul style="list-style-type: none"> ▪ 25% Density Bonus ▪ Expedited review ▪ Reduced water/sewer fees ▪ Relaxed design guidelines ▪ Priority for subsidies 		649 affordable units created (2004)
San Diego, CA (1992; 2003) 1,266,641	10 units	10%	<65% AMI (rentals) <100% AMI (own)	55 yrs	Fee In-Lieu	None		1,200 affordable units created \$300,000 funds generated -2004
San Francisco, CA (1992; 2002) 776,733	10 units	10%	< 80% AMI (rentals) <120% AMI (own)	50 yrs	<ul style="list-style-type: none"> ▪ Fee In-Lieu: ▪ <i>Citywide Affordable Housing Fund</i> ▪ Off-site: 15% 	<ul style="list-style-type: none"> ▪ Fee waivers 		578 affordable units created (2004)

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Santa Fe, NM -1998 620,203	1 unit	11-16%	Avg 65% AMI	Resale restrictions	<ul style="list-style-type: none"> ▪ <i>If developer proves hardship</i> 	<ul style="list-style-type: none"> ▪ 11-16% Density Bonus ▪ Simplified paperwork ▪ Fee waivers 		
South San Francisco, CA -2001 60,552	5 units	20%	50-80% AMI (2/5 units) <80-120% AMI (3/5 units)		<ul style="list-style-type: none"> ▪ Fee In-Lieu ▪ Off-Site: 20% 	None		
Southold, NY 20,599	5 units	25%						
Tallahassee, FL -2004 255,500	15 units	>10%-100%			<ul style="list-style-type: none"> ▪ Fee in Lieu ▪ Multi-family rental housing in Lieu ▪ Residential lots in Lieu ▪ Off-site units 	<ul style="list-style-type: none"> ▪ Density Bonuses up to 25% ▪ Additional Development Density ▪ Design Flexibility ▪ Expedited Review ▪ Deviations to Development Standards ▪ Transportation Concurrency Exemption 		

Source: Carras Community Investment, Inc., 2005, and Business and Professional People for the Public Interest, 2003, Strategic Planning Group, Inc., 2005