



## California Senate Bill (SB 9) Application Checklist and Requirements

California Senate Bill 9 (SB 9) created a ministerial approval process for duplex development and urban lot splits in single-family residential zones. To qualify as a SB 9 project, the housing project must satisfy the eligibility requirements listed in California Government Code §65852.21 and §66411.7.

To apply for ministerial review pursuant to SB 9, the Applicant must complete the following SB 9 Application Checklist and provide a ministerial review fee, architectural plans, Tentative Parcel Map (if proposing an urban lot split), and any other documents listed herein. In addition, all projects must comply with the City's objective development standards. Once the application and supporting documents have been submitted, the City has 30 days to review the application for compliance with SB 9 requirements. If the application is incomplete, a written letter requesting all pertinent information required to complete the application will be provided to the applicant within the prescribed 30 days.

---

**Please specify the project type that is being applied for (check one box only):**

**Duplex Development**

**Urban Lot Split**

---

**General Requirements:** To qualify as a SB 9 project, the applicant must check "yes" to all of the following general requirements. A "no" response to any one of the following general requirements does not qualify the project for SB 9 review.

**Yes    No**

- Is the property zoned RL-6,000, RL-5,000, RLM-4,000-D, RLM-4,000-A, RM-3,000-D, RM-2,000-A?
- Is the property owned solely by an individually property owner(s)?
- Is the property located outside of the following areas pursuant to California Government Code 65913.4 regulations?
  - Very High Fire Hazard Severity Zone
  - Earthquake Fault Zone
  - Special Flood Hazard Area
  - Regulatory Floodway
- Is the project located in a historic district, as identified in the State Historic Resources Inventory, or designated by the City as a historic resource?
- Would the project not require the demolition or alteration of any of the following?
  - Housing restricted for moderate, low, or very-low income persons
  - Housing subject to rent or price controls
  - Housing occupied by a tenant in the last three years
- If the property contains housing occupied by a tenant within the last three years, would the project demolish 25% or less of the existing exterior structural walls?
- Would the project be rented for periods of more than 30 consecutive days at a time?

Would the project provide a minimum of one off-street parking space per unit?  
*Note: Parking not required if parcel within 1/2-mile walking distance of a high-quality transit corridor or major transit stop, or within one block of a car share vehicle.*

Would the project be used for residential purposes only?

Are all existing improvements on the property permitted?

Does the homeowner or agent/representative acting on behalf of the homeowner acknowledge that it is the homeowner's responsibility to obtain review and approval of the proposed project from the applicable Homeowner's Association(s) for the subject property? **Please initial here:** \_\_\_\_\_

---

**Duplex Development:** Pursuant to SB 9 requirements, duplex development allows a maximum of two housing units on a single parcel, and including accessory dwelling units (ADU) and junior accessory dwelling units (JADU). The following development standards apply to duplex development. The applicant must check "yes" to all duplex development requirements to qualify for SB 9 review.

**Yes    No**

Would the project propose a maximum of two housing units on a single parcel, including ADUs and/or JADUs?

Would the project comply with the following building setbacks?  
o Minimum four-foot interior side and rear yard setback  
o Minimum front yard and street-side yard setbacks as required by base zoning district.

Would the project comply with all Building and Fire Code requirements for distance between structures?

Would the project comply with the lot coverage requirements of the base zoning district?  
*Note: Units below 800 square feet in size are not subject to zoning lot coverage requirements.*

---

**Urban Lot Split:** Pursuant to SB 9 requirements, any single-family zoned parcel may be subdivided to create two new parcels. The following development standards apply to urban lot splits. The applicant must check "yes" to all urban lot split requirements to qualify for SB 9 review.

**Yes    No**

Would the lot split result in two lots?  
*Note: Easements may be required to convey public utilities, access, and other services.*

Would the resulting lots be at least 40% of the original size of the existing lot?

Would the resulting lots be at least 1,200 square feet in size?

Has a Parcel Map been submitted to the County of Orange?

Has the property previously been split through an urban lot split?

Has the property owner previously subdivided an adjacent property pursuant to an urban lot split?

Would the resulting lot split contain a maximum of two housing units on each property?  
*Note: Urban lot splits are subject to the same development standards required for duplex developments.*

Would the individual property owner occupy any of the housing units for a minimum of three years after the approval date of the urban lot split?

Would the urban lot split conform to all objective standards of the Subdivision Map Act?

**Project and Contact Information:** Please provide the project and contact information for each section as stated below.

<b>Primary Project Information</b>					
Existing and New Project Address(es):					
Existing & Proposed Assessor Parcel Number(s):					
General Plan Designation:					
Zoning District:					
Proposed Number of Units:					
Size of Existing and Proposed Units (in square feet):					
<b>Applicant Contact Information</b>					
Name:					
Contact Type: <input type="checkbox"/> Property Owner <input type="checkbox"/> Architect/Engineer <input type="checkbox"/> Agent/Representative					
Mailing Address:					
Phone No.:					
Email:					
<b>Property Owner Contact Information (if different than above)</b>					
Name:					
Mailing Address:					
Phone No.:					
Email:					

**Certification:** I certify and declare under penalty of perjury under the laws of the State of California that the facts, statements, and information presented above, and in the attached exhibits, are true and correct to the best of my knowledge and belief. I further understand that additional information may be required for submittal to the City of Rancho Santa Margarita to complete my review.

\_\_\_\_\_  
Applicant Signature (if different from property owner)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Property Owner Signature

\_\_\_\_\_  
Date

**Application and Fee Requirements:** The following application, fees, and associated forms must be provided for duplex development and urban lot splits at the time of application submittal:

- A completed SB 9 Application along with three sets of architectural plans as described in this checklist.
- Fees and/or deposits paid according to the current City Master Fee Schedule.
- One stamped set of plans approved by the Orange County Fire Authority.
- A signed affidavit attesting that the applicant intends to occupy one of the housing units on one of the two lots as their principal residence for a minimum of three years from the date of approval of the parcel map for urban lot split applications.
- An executed deed restriction or covenant agreement recorded with the County of Orange Clerk-Recorder Office that the rental of any new SB 9 housing unit be for a term longer than 30 days, and that only residential uses are permitted on a lot created through an urban lot split.
- A completed landscape permit application submitted to the City's Engineering Division.
- A tentative parcel map subject to the City's Subdivision Code (Chapter 9.10) and SB 9 requirements for urban lot splits.

**Architectural Site Plan:** Provide three hardcopies of an architectural site plan (minimum size 11" x 17") that includes the following information:

- Property lines, lot coverage, setbacks, streets, and easements with dimensions and descriptions.
- Dimensions of yards, spaces between buildings, and spaces between property lines and buildings.
- Existing streets including location, names, widths, and centerline locations.
- Location of proposed buildings and structures, differentiated from existing buildings and structures.
- Location of existing and proposed walls and fences.
- Layout depicting parking space location, driveways, and curb cuts.
- Location of existing and new utility poles, fire hydrants, and associated connections.

**Architectural Floor Plan:** Provide three hardcopies of an architectural floor plan (minimum size 11" x 17") that includes the following information:

- Square footages and dimensions for each proposed structure.
- Number of stories in each proposed structure.
- Building Code occupancy classification for each proposed structure.
- Dimensions of new exterior walls and interior partitions.
- Location and sizes of all new windows, doors, stairways, and plumbing fixtures.
- Location of all fireplaces and utility structures, such as gas meters, electrical panels, and other similar connections.

**Architectural Building Elevations:** Provide three hardcopies of an architectural building elevation (minimum size 11" x 17") that includes the following information:

- Exterior view of all sides of each proposed structure that includes height dimensions and location of new windows, doors, and other exterior details that conform to the City's Objective Design Standards.
- Roofing material, pitch, and location of roof-mounted equipment, such as satellite antennas and heating/air conditioning units.
- A color rendering of each building elevation.
- Specifications of exterior finish materials.

Upon approval of a City SB 9 Application, building permits for the duplex development or urban lot split may be submitted for and obtained. Please contact the Planning Division at 949-635-1800 ext. 6705 or [dbingham@cityofrsm.org](mailto:dbingham@cityofrsm.org) if you have any questions regarding this application and submittal requirements.

<b>For City use only:</b>	
Planning Application No.: RSM	
Date received:	Received by:
Date review completed:	Determination (circle one): Complete / Incomplete