

## Exhibit 4 – Rubric for STR 6-Year Study

### Comprehensive Rubric (Checklist) for Study and Evaluation of City of Dana Point’s Short-Term Rental (STR) Program

<u>STR Program Aspect</u>	<u>Study</u>	<u>Assess</u>	
<b>STR Permits:</b>	<p>1) Number of STR permits issued on a rolling (chronological) basis<sup>1</sup> for the six (6) year study period <b>categorized by permit type, structure type (Single-Family, Multi-Family, Mixed-Use) and geographic zone.</b></p> <p>2) Number of STR permits rescinded or voided on a rolling (chronological) basis for the six (6) year study period. The reason for nullification of the STR permits shall be included and tabulated.</p> <p>3) Average nightly rates for each STR listing (during peak season and annually)<sup>2</sup>, including a</p>	<p>1) Assessment of whether the STR permit caps are adequate and/or whether the caps should be changed.</p> <p>2) Assessment of whether the STR permit types are adequate and/or whether the types should be changed.</p>	<p><b><u>Recommendations for any modifications to the Program, in connection with the assessments or otherwise</u></b></p>

<sup>1</sup> Rolling (chronological) data can be represented using a run-sequence or time series plot. [Run-Sequence Plot](#), National Institute of Standards and Technology, *U.S. Department of Commerce*.

<sup>2</sup> Average daily/nightly rates (ADRs) are calculated as revenue per unit rented, often calculated on a monthly basis. The peak season in California runs from June to August. ADRs can be averaged annually (January 1 to December 31) for longer-term trends. For additional explanation, see definitions in the [STAR Report](#) informational guide.

	<p>breakdown by type of STR and neighborhood.</p> <p>4) Average number of rooms per STR listing and number of guests able to accommodate.</p> <p>5) Accounting of nuisance complaints from permitted STRs.</p> <p>6) Any minimum nights requirement for each STR permits.</p>		
<b>Enforcement of Violations:</b>	<p>1) Summarized discussion of the number and types of STR violations for the six (6) year study period.</p>	<p>1) Assessment of whether the STR Program adequately addresses violations/nuisance complaints and/or whether aspects of the City's Program or its enforcement should be changed.</p>	<p><b><u>Recommendations for any modifications to the Program, in connection with the assessments or otherwise</u></b></p>
<b>Housing Inventory:</b>	<p>1) Number of single-family residences and multi-family units in the Coastal Zone on a rolling (chronological) basis for the six (6) year study period, including a separate analysis for the number of affordable long-term rental units in the Coastal Zone.</p> <p>2) Other relevant population trends in the Coastal Zone for the six (6) year study period.</p> <p>3) RHNA allocations and projected construction to meet RHNA allocations based on Annual Progress Reports submitted to the California Department of Housing and Community Development.</p>	<p>1) Assessment of whether the STR Program is having adverse impacts on housing stock and affordable long-term rental units in the Coastal Zone and/or whether aspects of the City's Program should be changed to lessen adverse impacts.</p>	

	<p>4) Vacancy rates categorized by structure type.</p> <p>5) Current and projected demand for existing housing units.</p> <p>6) Availability and geographic location of housing units for low to moderate income residents.</p> <p>7) Impact of STRs on future housing costs for low to moderate income residents.</p> <p>8) Percentage of housing stock utilized as unhosted short-term rentals, categorized by structure type.</p> <p>9) Number of Ellis Act evictions each year.</p> <p>10) Average monthly rental unit price and change in price year over year.</p>		<p><b><u>Recommendations for any modifications to the Program, in connection with the assessments or otherwise</u></b></p>
<p><b>Overnight Accommodations Inventory:</b></p>	<p>1) Tabulated inventory of non-STR coastal overnight accommodations and public visitor-serving amenities (including affordable/lower-cost coastal accommodations vs. market rate facilities, number of rooms provided in accommodations, and listing by category: e.g., hotels, hostels, campsites, etc.).</p> <p>2) Average nightly room rates for non-STR overnight accommodations in Dana Point's</p>	<p>1) Assessment of whether the STR Program is having adverse impacts on visitor use of non-STR overnight accommodations and other visitor-serving recreational facilities and/or whether aspects of the City's Program should be changed to lessen adverse impacts.</p>	

	<p>Coastal Zone (during peak season and annually.)</p> <p>3) Average number of guests accommodated per accommodation type.</p> <p>4) Number of hotel rooms with kitchenettes, laundry, and on-site parking.</p> <p>6) Average number of minimum nights for hotels operating in the jurisdiction.</p>		<p><b><u>Recommendations for any modifications to the Program, in connection with the assessments or otherwise</u></b></p>
<b>Parking:</b>	<p>1) Quantitative and qualitative information for any parking issues, complaints, or other impacts to coastal access.</p>	<p>1) Assessment of whether the parking and vehicle occupancy requirements for STRs should be changed.</p>	
<b>Revenues:</b>	<p>1) Details of the City's final fee structure for STR permit applications. Previous iterations of the fee schedule should be included, too. The City shall confirm whether the permit fees correspond to the City's costs of developing, managing, and enforcing the STR Program by providing numerical data in support.</p> <p>2) Annual transient occupancy tax (TOT) revenues <b>paid by STR operators.</b></p>	<p>1) Assessment of whether the revenue generated by the Program is sufficient for its continuance, whether additional fees are recommended to be implemented, and/or whether the permit fee structure presents public access impacts by overburdening STR hosts and reducing the availability or affordability of STR listings.</p>	

<p><b>Waitlist:</b></p>	<p>1) Number of STR permit applications on the waitlist on a rolling (chronological) basis for the six (6) year study period.  2) Average length of waiting period before STR permit applications are promoted from the waitlist.  3) Average duration of STR permits, including renewals.</p>	<p>1) Assessment of whether the STR permit caps are adequate and/or whether the caps should be changed.  2) Assessment of whether the waitlisting and renewal procedures should be changed.</p>	
-------------------------	--	---	--