



# SAN FRANCISCO PLANNING DEPARTMENT

**MEMO**

## Memo to the Planning Commission

Hearing Date: April 22, 2021

49 South Van  
Ness Ave.,  
Suite 1400  
San Francisco,  
CA 94103

Reception:  
628.652.7600

**DATE:** 16 April 2021

**PROJECT NAME:** 2020 HOUSING INVENTORY, HOUSING BALANCE  
REPORT NOS. 11 AND 12, AND UPDATE ON  
MONITORING REPORTS

**CASE NUMBER:** 2018-004047CWP-02

**STAFF CONTACT:** Michelle Littlefield, Data & Analytics Manager  
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**RECOMMENDATION:** None – Informational Only

### BACKGROUND

The Planning Department has released the following housing reports:

- *2020 Housing Inventory*: The Housing Inventory describes San Francisco's housing production trends on new housing construction, demolitions and alterations, as well as progress on meeting the City and County's regional housing needs allocation (RHNA) for different income levels. Gross and net unit gains are reported citywide, by zoning classification, and by planning district. In addition, the report lists major projects completed, authorized for construction, approved and under review by the Planning Department.
- *Housing Balance Report Nos. 11 and 12*: The Housing Balance Report monitors the housing balance between market rate and new affordable housing production over a ten-year period. Housing Balance Report No. 11, which covers July 1, 2010 through June 30, 2020, and Housing Balance Report No. 12, which covers January 1, 2011 through December 31, 2020, are submitted to meet the October 2020 and April 2021 housing balance reporting requirements, respectively. The ordinance defines the "Housing Balance" as the proportion of all new affordable housing units to the total number of all new housing units for a 10-year "Housing Balance Period," accounting for any loss of units removed from "protected status."

On July 16 and July 27, 2020, staff provided an update to the Planning Commission and the Board of Supervisors, respectively, on anticipated delays on the delivery of several housing and area plan monitoring reports due to the COVID-19 pandemic, deployment of staff as disaster service workers, and unfilled vacancies on the Data and Analytics Team. Since that time, the Planning Department has restructured to consolidate existing data

analysts into a single team, moving the Data and Analytics Team to the Administration Division for easier collaboration with the IT Team, and recruiting for data team vacancies to meet existing mandatory reporting requirements and emerging data analysis needs for the Department.

Staff will present key findings of the housing reports as well as provide an update on the estimated completion of various monitoring reports.

Attachments:

1. 2020 Housing Inventory: <https://sfplanning.org/project/housing-inventory>
2. Housing Balance Report Nos. 11 and 12: <https://sfplanning.org/housing-balance-report#reports>



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### SUMMARY

The Planning Department has released the *2020 Housing Inventory*, which describes San Francisco's housing production trends on new housing construction, demolitions and alterations, as well as progress on meeting the City and County's regional housing needs allocation (RHNA) for different income levels. Gross and net unit gains are reported citywide, by zoning classification, and by planning district. In addition, the report lists major projects completed, authorized for construction, approved and under review by the Planning Department.

Key findings discussed in the *2020 Housing Inventory* include:

- New housing production in 2020 totaled 4,402 gross units compared to 4,858 units in 2019, a 9% decrease from 2019. This includes 3,957 units in new construction compared to 4,461 units in 2019, and 445 new units added through the conversion of non-residential uses or expansion of existing structures compared to 397 units in 2019.
- The net addition of 4,044 units was added to the City's housing stock in 2020 compared to 4,698 units in 2019, which is a 14% decrease from 2019.
- The majority of new housing development in 2020 occurred in the South of Market and Mission Planning Districts, accounting for 1,671 net units and 41%, and 1,077 net units and 27%, respectively.
- Affordable housing units made up 20% of new units added to the housing stock with 818 affordable units completed in 2020 compared to 1,456 units completed in

2019, which represents a 44% decrease in completed affordable units from 2019 and is 21% below the 5-year average of 1,037 affordable units. This count includes 480 inclusionary units, 208 100% affordable units, and 130 accessory dwelling units in 2020, compared to 405 inclusionary units, 874 100% affordable units, and 177 accessory dwelling units in 2019. About 56% of the new affordable units are affordable to low-income households.

- By the end of 2020, there were approximately 403,357 dwelling units in the city compared to approximately 399,313 units in 2019, a 1% increase in total housing stock.
- In 2020, the Department of Building Inspection authorized the construction of 2,767 units compared to 2,944 units authorized in 2019, a 6% decrease from 2019.
- In 2020, the Planning Department approved and fully entitled 553 projects totaling 7,332 gross units compared to 554 projects totaling 2,895 gross units in 2019, a 153% increase in gross units from 2019.
- In 2020, 413 projects totaling 3,453 gross units were filed and accepted for review by the Planning Department compared to 535 projects totaling 3,924 gross units in 2019, a 12% decrease from 2019.

The *2020 Housing Inventory* may be accessed on the Planning Department website here: <https://sfplanning.org/project/housing-inventory>.

# 2020 SAN FRANCISCO HOUSING INVENTORY





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**Front Cover:** 1601 Mariposa Street, 60 Affordable Housing Units;

Photo Source: <https://www.dbarchitect.com/> Photo Credit: Craig Cozart Photography

# 2020 SAN FRANCISCO HOUSING INVENTORY

San Francisco Planning Department

April 2021







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# **INTRODUCTION:** ABOUT THE 2020 HOUSING INVENTORY

The *Housing Inventory* is the Planning Department's annual survey of housing production trends in San Francisco. The report details changes in the City's housing stock, including housing construction, demolition, and alterations, and has been published regularly since 1967. This report presents housing production activity completed or authorized during the year 2020.

By monitoring changes in San Francisco's housing stock, the *Housing Inventory* provides a basis for evaluating the housing production goals and policies of the Housing Element of the San Francisco General Plan. Housing policy implications that may arise from data in this report, however, are not discussed here.

The *Housing Inventory* reports housing production, which begins when a building permit application for a project is filed with the City. The application is first reviewed by the Planning Department for compliance with the Planning Code, zoning, and other applicable policies. If the Planning Department approves the project, the Department of Building Inspection (DBI) reviews the application for compliance with the Building Code. If DBI approves the application, it issues a permit authorizing construction. The next step is for the project sponsor to begin construction on the project. Once construction has been completed and passed all required inspections, DBI issues a Certificate of Final Completion (CFC) for the project.

The *Housing Inventory* also reports the annual net gain in housing units citywide by general Zoning Districts and by Planning Districts. Net gain is the number of newly constructed units with CFCs issued, adjusted for alterations – which can add or subtract units – and demolitions. Affordable housing, condominiums, and changes in the residential hotel stock are other areas of interest covered by the *Housing Inventory*. In addition, the report provides a regional perspective by examining housing construction activity and home prices for the nine-county Bay Area region. Finally, major projects completed, authorized, under review, or in the pipeline are listed in Appendix A. The *Housing Inventory* also summarizes housing production trends in the recently adopted planning areas in Appendix B. These plan areas have separate five-year monitoring reports that detail housing production trends.

This report was prepared from information received from a number of different sources including the Department of Building Inspection, the Department of Public Works, and Planning Department records. The Mayor's Office of Housing and the Office of Community Investment and Infrastructure (Successor Agency to the San Francisco Redevelopment Agency) provided information on affordable housing projects. The California Homebuilding Foundation/Construction Industry Research Board provided building permit data for the Bay Area region. The California Association of Realtors provided housing rental and ownership costs. Project sponsors also contributed data. The City is undergoing systems and process improvements to improve overall data quality related to permit data collection and tracking across all permitting agencies. The data presented in this report is the best available data as of the date of publication.

Copies of this report can be downloaded from the Publications & Reports link at the Planning Department's web site at <http://www.sfplanning.org>.

A limited number of copies are available for purchase from the Planning Department, 49 South Van Ness Avenue, Suite 1400, San Francisco, CA 94103. Copies may also be reviewed at the Government Information Center on the fifth floor of the San Francisco Main Library.

Department Staff Contact for this report is Michelle Littlefield, (628) 652-7435, [Michelle.Littlefield@sfgov.org](mailto:Michelle.Littlefield@sfgov.org).

## Housing Production Process

The *Housing Inventory* describes net changes in the housing stock and details units that have been certified complete, units that were authorized for construction, and units that are under review by the Planning Department.

The housing production process begins with a project review by the Planning Department and ends with the issuance of a Certificate of Final Completion (CFC) by the Department of Building Inspection (DBI). Figure 1 outlines the main stages of the housing production process.

### Units Reviewed by Planning Department and DBI

For most major projects, review by the Planning Department is the first step in the process. Proposals are reviewed by the Planning Department for compliance with the Planning Code, the General Plan, environmental requirements, and other regulations and policies. Generally, only major projects require special Planning Department approvals, such as a conditional use permit or variance. The number and type of projects undergoing Planning Department review are indicators of current building interest and production expectation within the next two to five years. Following Planning Department approval and entitlements, DBI reviews the project for compliance with the Building Code.

### Units Authorized for Construction

If DBI approves the project following its own review, it issues building permits authorizing construction. Projects with approved building permits generally start construction within 90 days from the date the permit is issued. Start of

construction, however, may be delayed for up to a year. If the permit is not picked up or acted on within 90 days, the permit expires. The number of units authorized for construction is a key indicator of future housing construction.

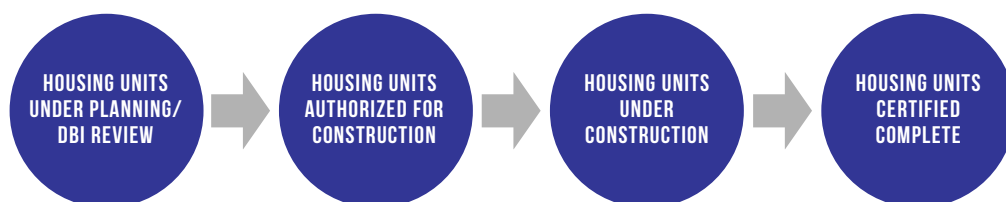
### Units Certified Complete

Projects are inspected by DBI at various stages throughout the construction process. However, inspectors only issue Certificates of Final Completions (CFCs) for projects that are deemed 100% complete. Units certified complete are an indicator of changes to the City's housing supply and include units gained or lost from new construction, alterations, and demolitions.

For the purposes of this report, however, units that have received Temporary Certificates of Occupancy (TCOs) or "Final Inspection Approval" from DBI are also considered and counted as completed units.

Housing production is measured in terms of units rather than projects because the number of units in a project varies. Not all projects reviewed or approved are built. A project's building permit application may be withdrawn, disapproved, or revised; its permit may also expire if, for example, a project is not financed. Housing production is also affected by changes in market conditions and the economy. However, once building construction starts, a project is usually completed within one to two years, depending on the size of the project.

**FIGURE 1.**  
The Housing  
Production Process



Note: Most housing projects require Planning Department review. For some projects, including major multi-phased projects, State and/or other City agencies may serve as the lead entitling agency.





Edwin M. Lee Apartments (1150 3rd Street); 100% Affordable Units  
Photo Source: <https://www.lmsarch.com/>  
Photo Credit: Bruce Damonte

# HIGHLIGHTS:

## 2020 SNAPSHOT



## SUMMARY OF HIGHLIGHTS

The construction of new housing in 2020 totaled 4,402 gross units compared to 4,858 units in 2019, which represents a 9% decrease from 2019. This production includes 3,957 units in new construction compared to 4,461 units in 2019, and 445 new units added through conversion of non-residential uses or expansion of existing structures compared to 397 in 2019. Three hundred fifty-eight (358) units were lost compared to 160 units lost in 2019, including demolitions (352; a 153% increase from 139 demolitions in 2019), unit mergers (5; a 67% increase from 3 mergers in 2019), and removal of illegal units (0; a 100% decrease from 18 in 2019). The city experienced a 12% increase in units added through alterations (445 in 2020 compared to 397 in 2019) and a 71% decrease in units lost through alterations since 2019 (6 in 2020 compared with 21 in 2019).

There was a net addition of 4,044 units to the City's housing stock in 2020 compared to 4,698 units in 2019, which is a 14% decrease from the 2019 net addition. The net addition in 2020 is also about 31% higher than the 10-year average net addition of 3,082, and is less than 3% below the 5-year average net addition of 4,162 units. By the end of 2020, there were approximately

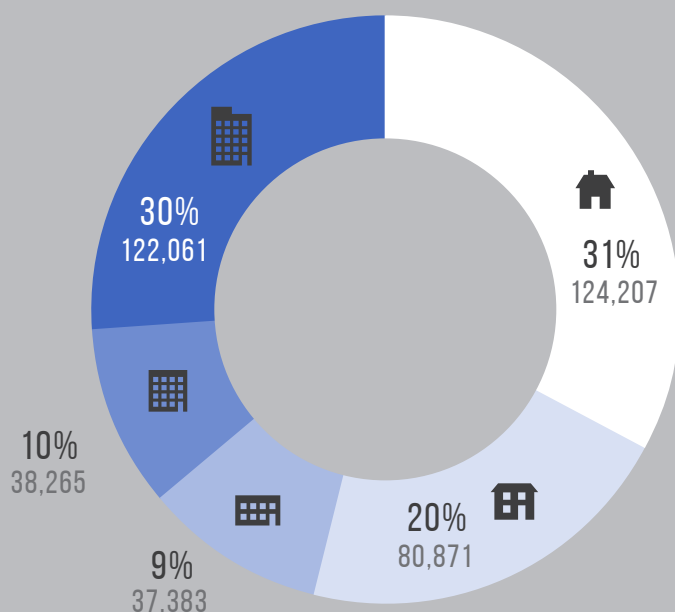
403,357 dwelling units in the city, compared to approximately 399,313 units in 2019, representing a 1% increase in total housing stock.

In 2020, affordable housing production totaled 818 units compared to 1,456 units in 2019, which is a 44% decrease in completed affordable housing units. This is also about 21% below the five-year average of 1,037 affordable units. These new affordable units made up 20% of new units added to the City's housing stock. This count includes approximately 480 inclusionary units, 208 100% affordable units, and 130 accessory dwelling units in 2020, compared to 405 inclusionary units, 874 100% affordable units, and 177 accessory dwelling units in 2019. About 56% of the new affordable units are affordable to low-income households.

In 2020, DBI authorized the construction of 2,767 units compared to 2,944 units authorized in 2019, representing a 6% decrease from 2019. Eighty-eight percent (88%) of new housing units authorized for construction over the last 5 years has been for buildings with 20 or more units. The Planning Department approved and fully entitled 553 projects in 2020. These projects propose a total of 7,332 gross units.

## HOUSING STOCK

### NET HOUSING STOCK BY BUILDING TYPE

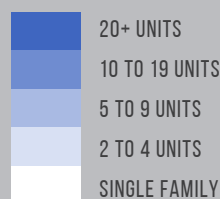


403,357

↑ 1.0%

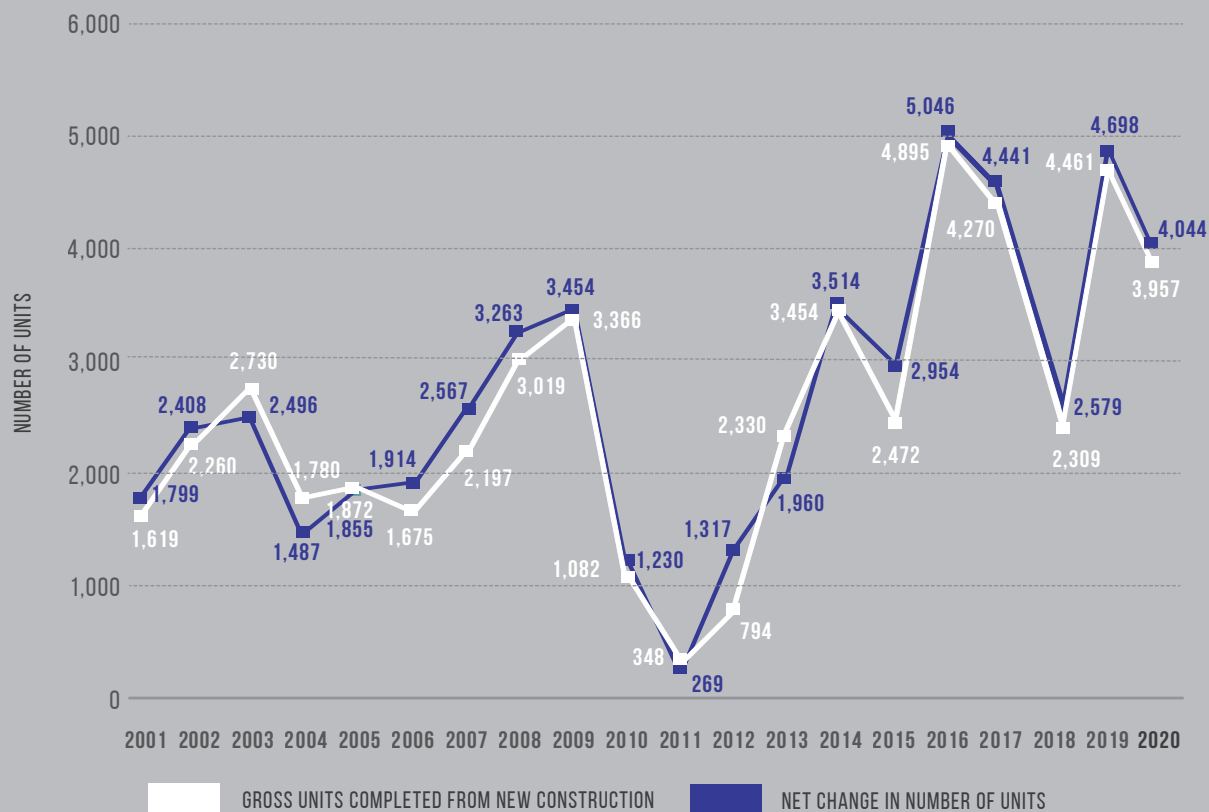
AS OF 2020

CHANGE FROM 2019 (399,313)



## NEW CONSTRUCTION TRENDS

### 20-YEAR NEW CONSTRUCTION TRENDS, 2001–2020



3,957

↓ 11%

35%

2020

CHANGE FROM 2019 (4,461)

ABOVE 10-YEAR AVERAGE (2,929)

4,044

↓ 14%

31%

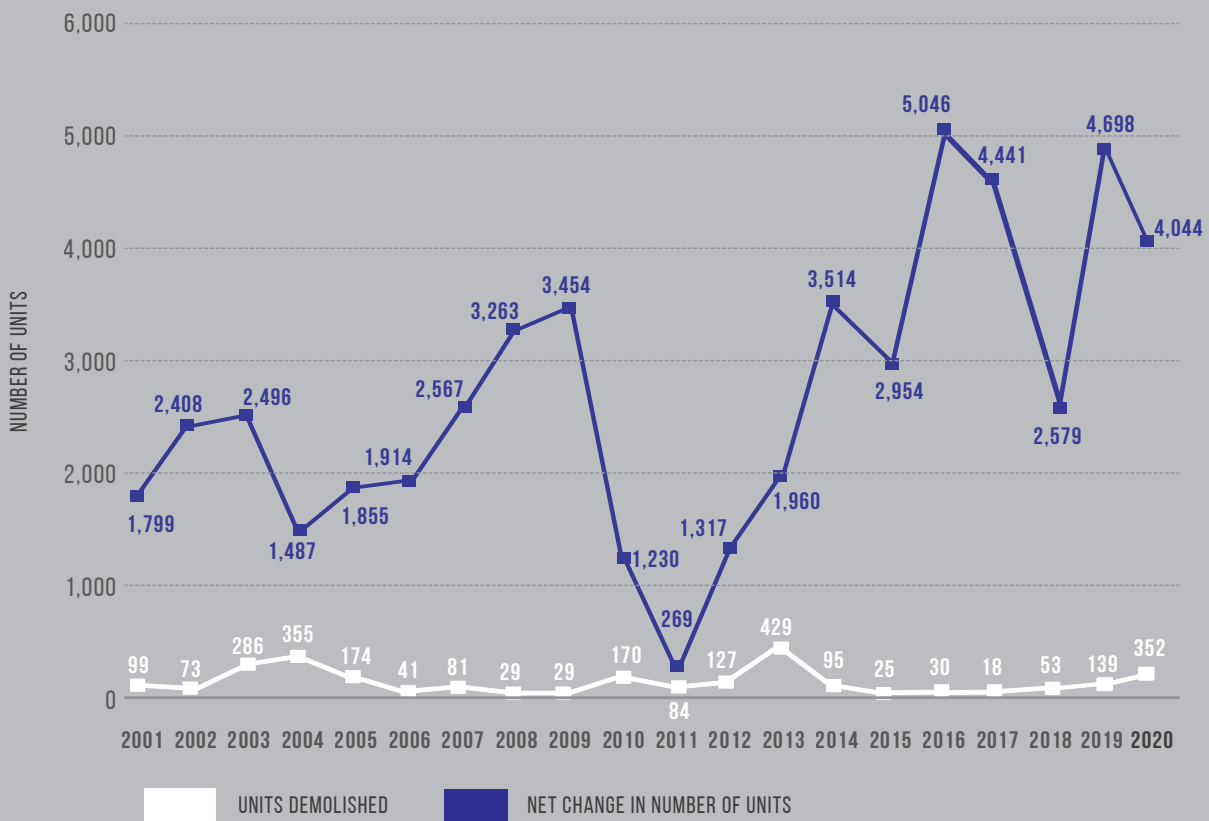
2020

CHANGE FROM 2019 (4,698)

ABOVE 10-YEAR AVERAGE (3,082)

## UNIT DEMOLITION TRENDS

### 20-YEAR UNIT DEMOLITION TRENDS, 2001–2020



352

2020

↑ 153%

CHANGE FROM 2019 (139)

161%

ABOVE 10-YEAR AVERAGE (135)

# UNIT AUTHORIZATION FOR CONSTRUCTION TRENDS

20-YEAR NET UNIT AUTHORIZATION FOR CONSTRUCTION TRENDS, 2001–2020



2,767

↓ 6%

28%

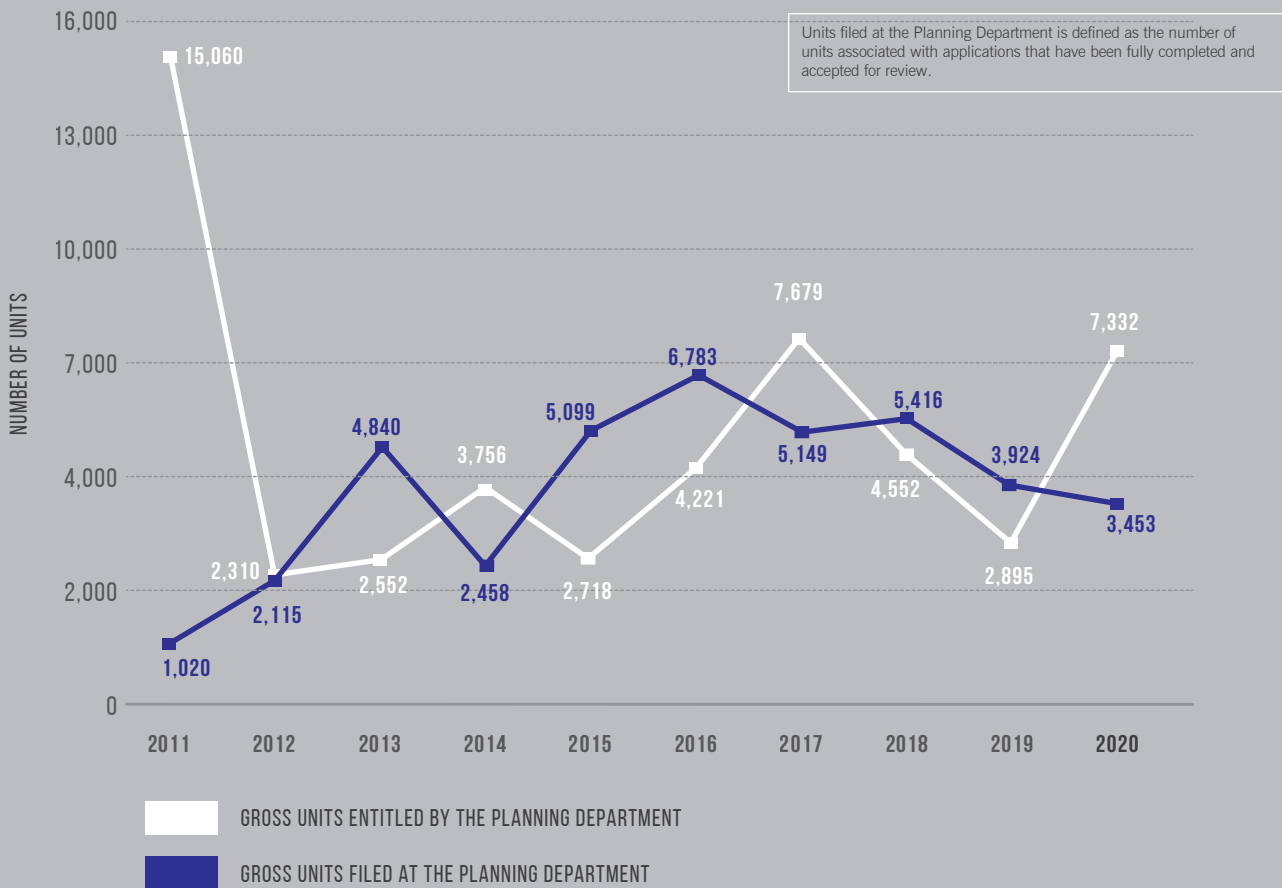
2020

CHANGE FROM 2019 (2,944)

BELOW 10-YEAR AVERAGE (3,850)

## UNITS FILED AND ENTITLED TRENDS

### 10-YEAR GROSS UNITS FILED AND ENTITLED, 2011–2020



7,332

▲ 153%

38%

2020

CHANGE FROM 2019 (2,895)

ABOVE 10-YEAR AVERAGE (5,308)

3,453

▼ 12%

14%

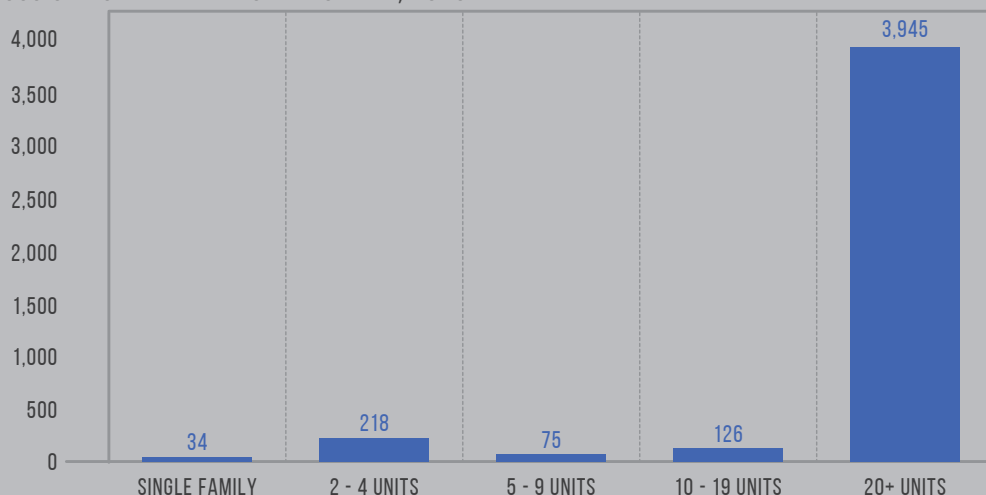
2020

CHANGE FROM 2019 (3,924)

BELOW 10-YEAR AVERAGE (4,026)

## 2020 HOUSING UNIT TRENDS

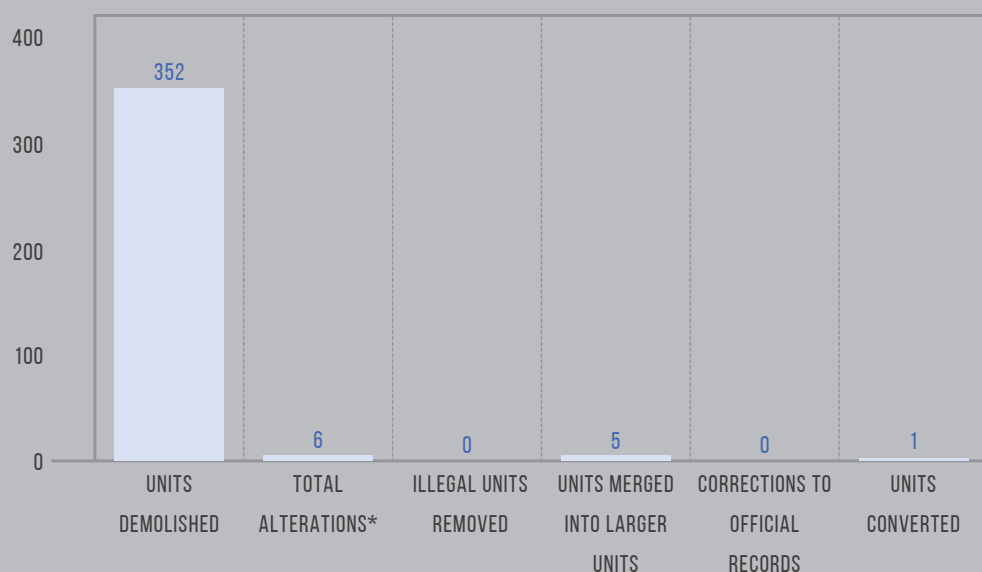
### GROSS UNITS ADDED BY BUILDING TYPE, 2020



**4,402** **↓9%**

**TOTAL GROSS  
UNITS ADDED,  
2020** **CHANGE FROM  
2019 (4,858)**

### UNITS LOST THROUGH ALTERATIONS AND DEMOLITIONS BY TYPE OF LOSS, 2020

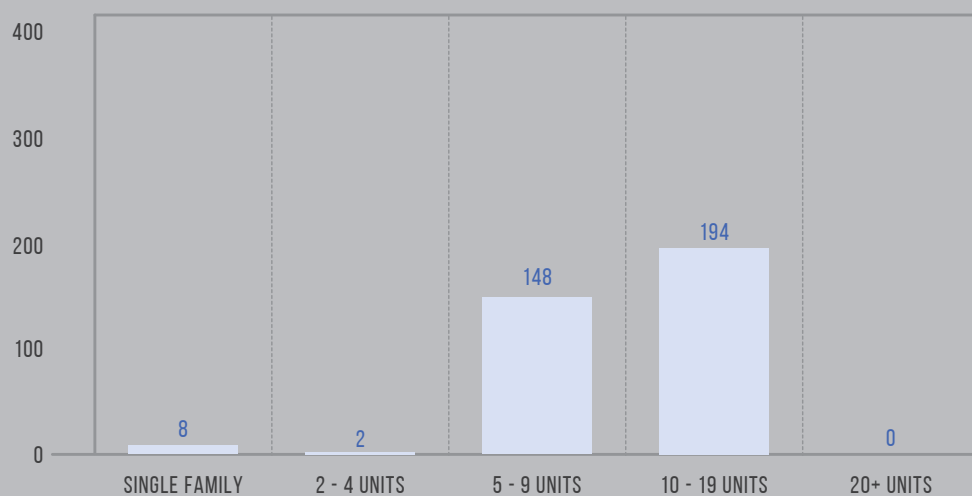


**358** **↑124%**

**TOTAL UNITS  
LOST, 2020** **CHANGE FROM  
2019 (160)**

\*TOTAL ALTERATIONS = ILLEGAL UNITS REMOVED + UNITS MERGED  
INTO LARGER UNITS + CORRECTIONS TO OFFICIAL RECORDS + UNITS  
CONVERTED

### UNITS DEMOLISHED BY BUILDING TYPE, 2020

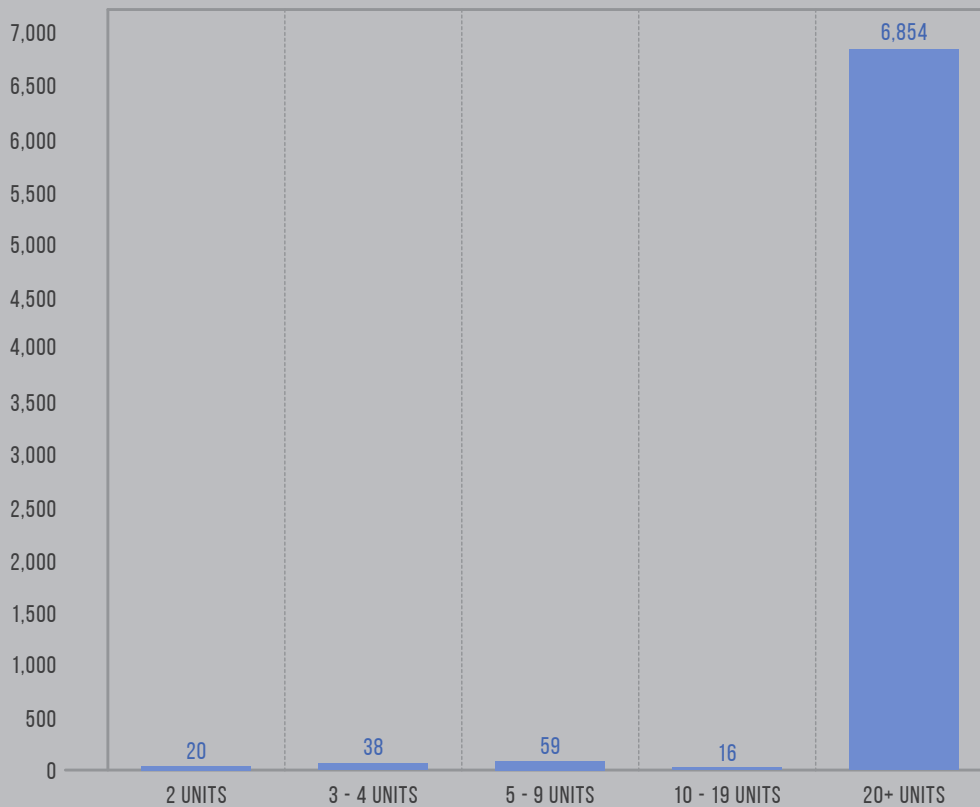


**352** **↑153%**

**TOTAL UNITS  
DEMOLISHED,  
2020** **CHANGE FROM  
2019 (139)**

## CONDOMINIUMS IN 2020

### NEW CONDOMINIUMS RECORDED BY BUILDING TYPE, 2020

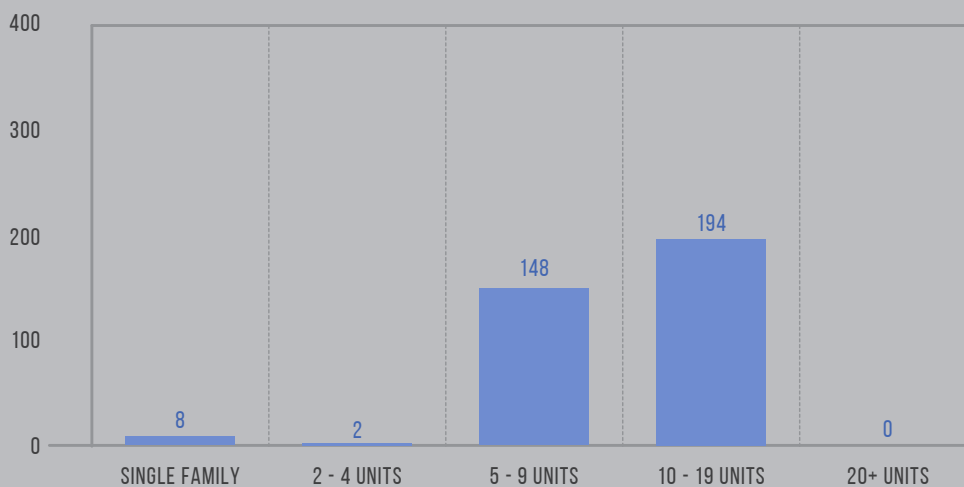


**6,987** **↑61%**

**TOTAL NEW  
CONDOMINIUMS  
RECORDED BY  
BUILDING TYPE,  
2020**

**CHANGE FROM  
2019 (4,327)**

### CONDOMINIUM CONVERSIONS BY BUILDING TYPE, 2020



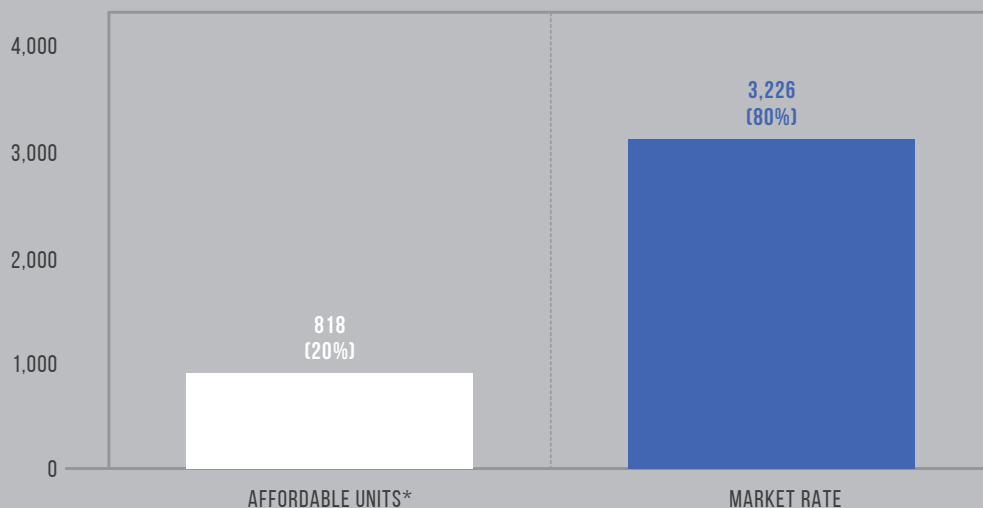
**201** **↓48%**

**TOTAL  
CONDOMINIUMS  
CONVERSIONS  
BY BUILDING  
TYPE, 2020**

**CHANGE FROM  
2019 (387)**

# AFFORDABLE HOUSING IN 2020

## NET AFFORDABLE HOUSING AND MARKET-RATE HOUSING, 2020



**818** **↓44%**

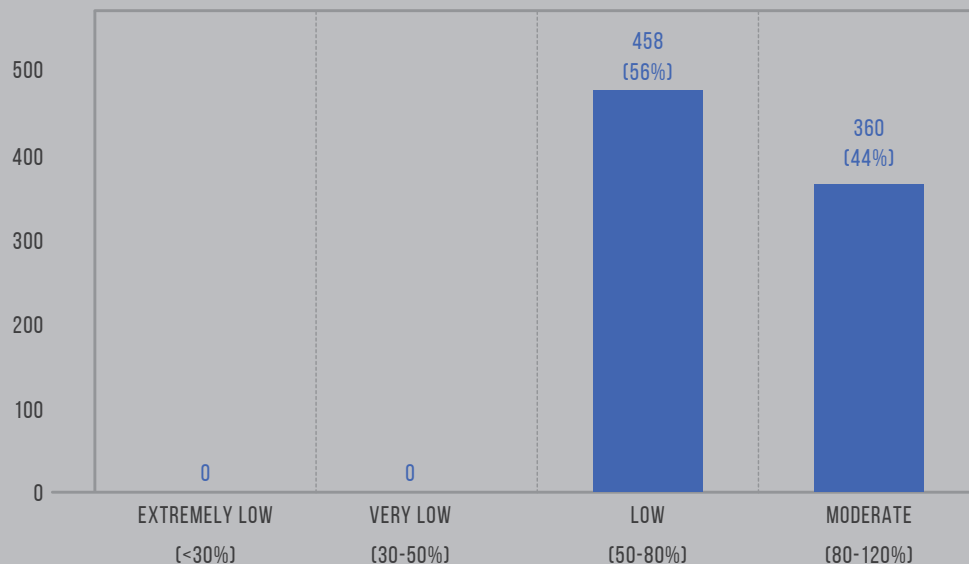
**TOTAL NET AFFORDABLE, 2020** **CHANGE FROM 2019 (1,456)**

**3,226** **↓5%**

**TOTAL MARKET RATE, 2020** **CHANGE FROM 2019 (3,402)**

Affordable units include 100% affordable units, inclusionary units, and units built as accessory dwelling units. For definitions, see page 32.

## NET NEW AFFORDABLE HOUSING CONSTRUCTION BY INCOME LEVEL, 2020



**818** **↓44%**

**TOTAL NET AFFORDABLE, 2020** **CHANGE FROM 2019 (1,456)**

Affordable units include 100% affordable units, inclusionary units, and units built as accessory dwelling units. For definitions, see page 32.

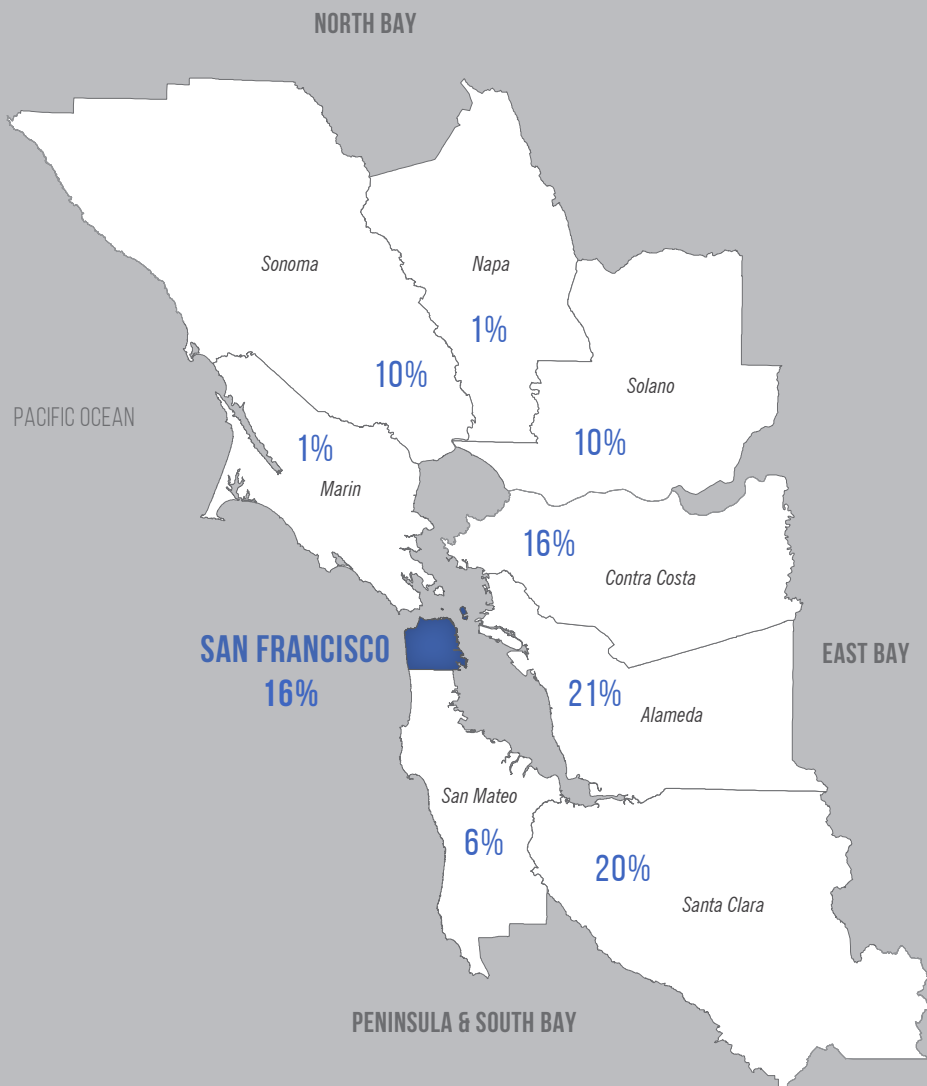


## HOUSING TRENDS BY GEOGRAPHY

Units Authorized for Construction for San Francisco and the Bay Area Counties, 2020

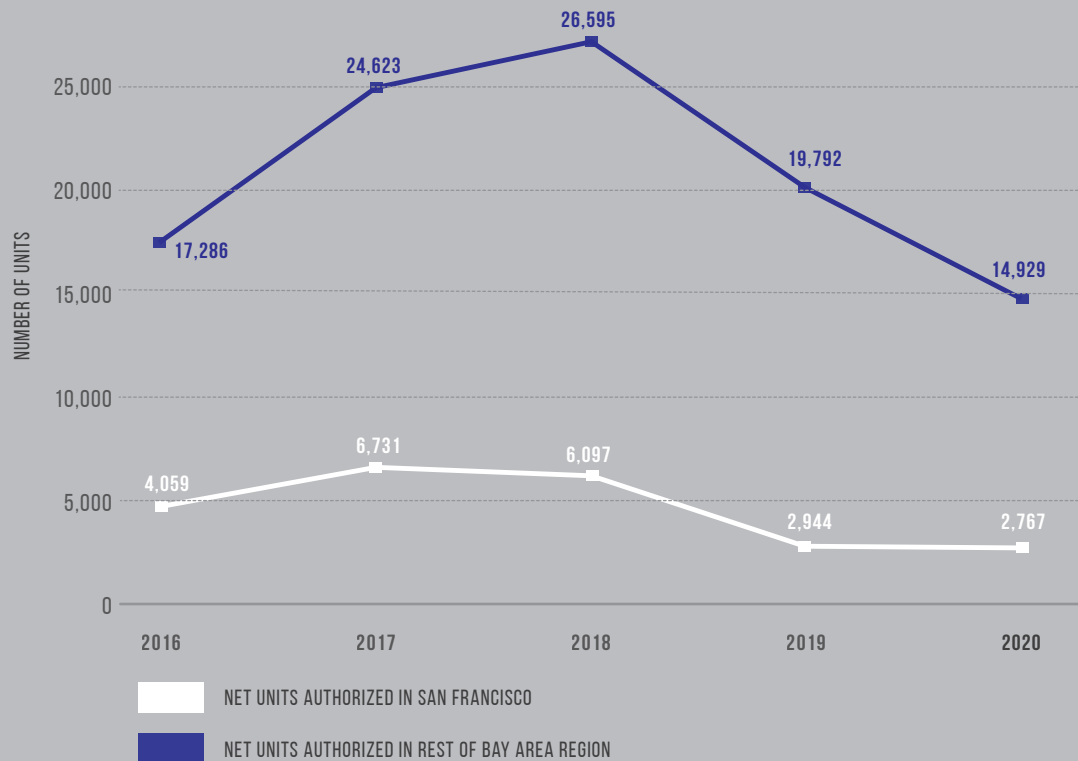
County	Single-Family Units	Multi-Family Units	Total Units	Percent of Total
Alameda	1,153	2,610	<b>3,763</b>	21%
Contra Costa	1,525	1,243	<b>2,768</b>	16%
Marin	96	3	<b>99</b>	1%
Napa	227	0	<b>227</b>	1%
San Francisco	37	2,730	<b>2,767</b>	16%
San Mateo	548	439	<b>987</b>	6%
Santa Clara	1,329	2,243	<b>3,572</b>	20%
Solano	981	716	<b>1,697</b>	10%
Sonoma	1,038	778	<b>1,816</b>	10%
<b>TOTAL</b>	<b>6,934</b>	<b>10,762</b>	<b>17,696</b>	<b>100%</b>

Source: California Homebuilding Foundation



## HOUSING TRENDS BY GEOGRAPHY

### 5-YEAR NET UNITS AUTHORIZED IN THE BAY AREA REGION, 2016–2020



2,767	↓ 6%	27%
<span style="display:inline-block; width:15px; height:15px; background-color:white; border:1px solid black;"></span> 2020	CHANGE FROM 2019 (2,944)	BELOW 10-YEAR AVERAGE (3,784)
14,929	↓ 25%	15%
<span style="display:inline-block; width:15px; height:15px; background-color:blue;"></span> 2020	CHANGE FROM 2019 (19,792)	BELOW 10-YEAR AVERAGE (17,507)

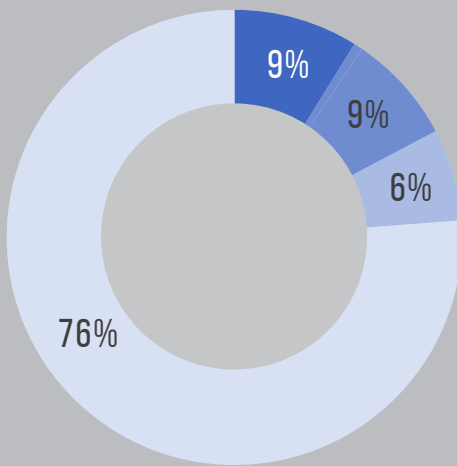
## REGIONAL HOUSING NEEDS ALLOCATION, PLANNING PERIOD 2015–2022

Household Affordability	Housing Goals 2015–2022	Actual Production as of 2020	% of Production Target Achieved	Production Deficit as of 2020
Above Moderate (> 120% AMI)	12,536	18,528	100%*	-
Moderate Income (80–120% AMI)	5,460	1,467	27%	3,993
Low Income (< 80% AMI)	4,639	2,182	47%	2,457
Very Low Income (< 50% AMI)	6,234	2,067	33%	4,167
<b>TOTALS</b>	<b>28,869</b>	<b>24,244</b>	<b>84%*</b>	<b>6,855</b>

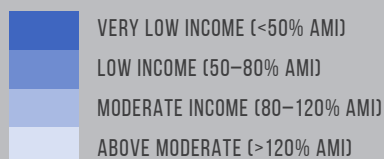
Actual production totals are not submitted to the State Department of Housing and Community Development as progress towards RHNA. Building permits authorized count as progress towards RHNA. For the purposes of this report only, actual production is shown in comparison to RHNA goals.

\*Although market rate housing production is above the RHNA goal for that income level, 100% is shown here to indicate that the goal has been met. The total percentage of target achieved reflects that as well.

### ACTUAL PRODUCTION, 2015-2022



The State Department of Housing and Community Development, along with the Association of Bay Area Governments set the regional housing needs allocation or RHNA targets for housing production in every county in the Bay Area. Sixty percent of RHNA targets are required to be affordable to households with varying incomes. Over 28,000 net new housing units have been allocated to San Francisco for the years 2015-2022. The number of units produced as of 2020 are shown in the pie chart.



# **FINDINGS:** HOUSING IN SAN FRANCISCO

## Housing Stock

The number of units in San Francisco's housing stock is derived by taking the total units from the decennial census count as baseline, then adding net unit change each subsequent year until the next census. Because the 2010 Census did not collect detailed housing characteristics, the 2015 *Housing Inventory* used data from the 2010 Five Year American Community Survey (2010 ACS5), and the 2020 *Housing Inventory* uses this calculation as a baseline for consistency. Annual net unit change – the sum of units completed from new construction and alterations minus units lost from demolition and alterations – are added to this 2010 ACS5 baseline count.

According to the 2010 ACS5 and new production over the last ten years, there are about 403,357 housing units in San Francisco, distributed between single family units (30%), moderate

density buildings (two to nine units – 29%), and higher density structures (10 or more units – 40%). This distribution is similar over the last nine years and will likely change in the next few years as the trend has been moving towards increasingly larger buildings, as presented in Table 11.

In 2020, there was a net gain of 4,044 units in the City's housing stock. As of December 2020, units in buildings with 20 or more units comprised 30% of the City's total housing. Of all units added since the 2010 ACS5, about 93% have been in buildings with 20 units or more.

Table 1 provides a profile of San Francisco's housing stock by building type from 2010 through 2020. Figure 2 illustrates San Francisco's net housing stock by building type for 2020.

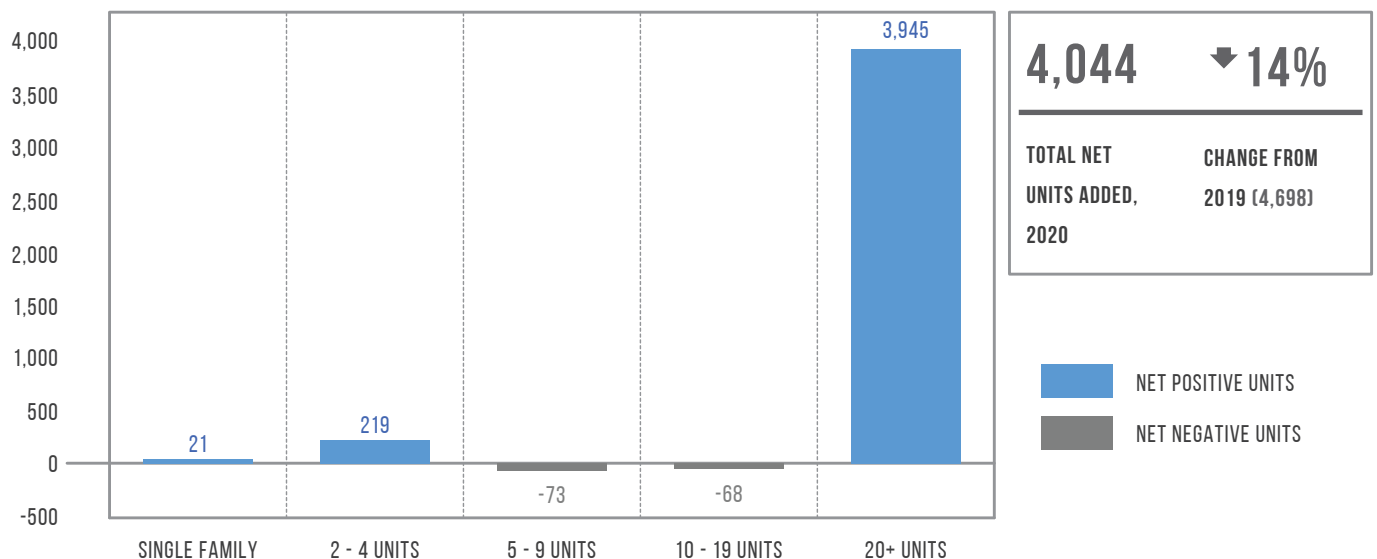
**TABLE 1.**  
**San Francisco Net Housing Stock by Building Type, 2010–2020**

Building Type	Single Family	2 to 4 Units	5 to 9 Units	10 to 19 Units	20 + Units	Total
2010 ACS5	123,951	79,774	37,088	37,656	93,496	<b>372,535</b>
Net Added 2011–2020	256	1,097	295	609	28,565	<b>30,822</b>
<b>TOTAL</b>	<b>124,207</b>	<b>80,871</b>	<b>37,383</b>	<b>38,265</b>	<b>122,061</b>	<b>403,357</b>

Source: U.S. Census Bureau; Planning Department

\* This total includes other "housing" types that the Census Bureau counts, such as mobile homes, RVs, vans, and houseboats.

**FIGURE 2.**  
**San Francisco Net Housing Stock Added in 2020 by Building Type**



## Housing Production Trends

### New Housing Construction

- » In 2020, new construction units total 3,957 units compared to 4,461 units in 2019, a decrease of 11% from 2019. New construction in 2020 is 35% above the 10-year average of 2,929 new construction units.
- » Alterations resulted in 445 units added through conversion or expansion of existing structures and addition or legalization of accessory dwelling units, compared to 397 in 2019, resulting in a 12% increase from 2019. Six (6) units were lost due to removal of illegal units and mergers compared to 21 units lost in 2019.

This means a net total of 439 units were added to the housing stock through “alterations” of existing units or buildings. This is a 17% increase from the 376 net units added in 2019 as a result of alterations.

- » Three hundred fifty-two (352) units were demolished in 2020.
- » The net addition to the City’s housing stock in 2020 is 4,044 units compared to 4,698 units in 2019, which represents a 14% decrease from 2019 and is 31% above the 10-year average of 3,082 net new units.
- » In 2020, 818 affordable housing units were completed compared to 1,456 units in 2019, which is a 44% decrease from the previous year. Affordable units completed in 2020 make up 20% of the total new units built in 2020.
- » In 2020, DBI authorized 2,767 units for construction. This represents a 6% decrease from the number of units authorized in 2019 (2,944).

Table 2 and the figure on page 6 show housing production trends over the past 20 years. The table and figure account for net new units gained – which is the number of units newly constructed and adjusted for alterations, which can add or subtract units, and demolitions.

Three of the largest projects completed in 2020 include: 49 South Van Ness Avenue/1500 Mission St (550 units including 110 low-income affordable inclusionary units), 160 Folsom Street (390 units including 156 low-income affordable and inclusionary units), and 1066 Market Street (303 market rate units).

1150 3rd Street (100% affordable with 118 low-income units) and 455 Fell Street (100% affordable, with 107 low-income units) are two major affordable housing projects completed in 2020.

A list of all market rate projects with ten units or more completed in 2020 is included in Appendix A-1. Appendix A-2 includes all major affordable housing projects with 20 or more units completed in 2020.

**TABLE 2.**  
**San Francisco Housing Trends, 2001–2020**

Year	Units Authorized for Construction	Units Completed from New Construction	Units Demolished	Units Gained or Lost from Alterations	Net Change In Number of Units
2001	2,380	1,619	99	259	1,779
2002	1,478	2,260	73	221	2,408
2003	1,845	2,730	286	52	2,496
2004	2,318	1,780	355	62	1,487
2005	5,571	1,872	174	157	1,855
2006	2,332	1,675	41	280	1,914
2007	3,281	2,197	81	451	2,567
2008	2,346	3,019	29	273	3,263
2009	752	3,366	29	117	3,454
2010	1,209	1,082	170	318	1,230
2011	2,033	348	84	5	269
2012	3,888	794	127	650	1,317
2013	3,168	2,330	429	59	1,960
2014	3,834	3,454	95	155	3,514
2015	2,982	2,472	25	507	2,954
2016	4,059	4,895	30	181	5,046
2017	6,731	4,270	18	189	4,441
2018	6,097	2,309	53	323	2,579
2019	2,944	4,461	139	376	4,698
2020	2,767	3,957	352	439	4,044
<b>TOTAL</b>	<b>62,015</b>	<b>50,890</b>	<b>2,689</b>	<b>5,074</b>	<b>53,275</b>

**Source:** Planning Department, Department of Building Inspection

**Note:** Net Change equals Units Completed less Units Demolished plus Units Gained or (Lost) from Alterations.

## Projects Approved and Under Review by Planning

Depending on the type of project, there are various approvals by the Planning Department that a project needs to be fully entitled. Full entitlement of a project means that the project sponsor can proceed with the next step in the development process: securing approval and issuance of a building permit.

- » In 2020, 413 projects with 3,453 total gross units were filed with the Planning Department, compared to 535 projects and 3,924 gross units filed in 2019. This is a 23% decrease from the number of projects filed in 2019 and is about 30% below the five-year average of 4,945 gross units.

**TABLE 3.**  
Projects and Units Filed at Planning Department for Review, 2016–2020

Year	Projects Filed	Units Filed
2016	562	6,783
2017	591	5,149
2018	708	5,416
2019	535	3,924
2020	413	3,453
<b>TOTAL</b>	<b>2,809</b>	<b>24,725</b>

Source: Planning Department

- » The Planning Department approved and fully entitled 553 projects in 2020. These projects propose a total of 7,332 gross units. Two of the larger projects filed in 2020 include: Pier 70 Waterfront Site (1,100 net total units) and 10 South Van Ness Avenue (966 net total units).

Table 3 shows the number of housing projects filed with the Planning Department over the last five years. Units filed at the Planning Department is defined as the number of units associated with applications that have been fully completed and accepted for review. It is important to note that Planning may not approve all projects under review or may not approve projects at the unit levels requested. Project sponsors may also change or withdraw the project proposals. Some projects listed in Table 3 as undergoing Planning Department review may have reached their approval stage, been authorized for construction, or may have been completed. Lastly, many of the housing projects under development by the Office of Community Investment and Infrastructure (OCII) or other agencies with their own entitlement process do not show up in Table 3 because those agencies are responsible for the review of those projects.

Appendix A-3 records major projects (10 units or more) that received Planning entitlements in 2020. Appendix A-4 contains a list of the major projects filed at the Planning Department for review during 2020.

**TABLE 4.**  
Units and Projects Authorized for Construction by DBI by Building Type, 2016–2020

Year	Units by Building Type					Total	Projects
	Single Family	2 Units	3 to 4 Units	5 to 19 Units	20+ Units		
2016	52	151	105	192	3,559	4,059	386
2017	45	82	100	256	6,248	6,731	331
2018	31	219	93	393	5,361	6,097	504
2019	17	183	137	72	2,535	2,944	556
2020	37	119	97	258	2,256	2,767	352
<b>TOTAL</b>	<b>182</b>	<b>754</b>	<b>532</b>	<b>1,171</b>	<b>19,959</b>	<b>22,598</b>	<b>2,129</b>

Source: Planning Department, Department of Building Inspection



## Units Authorized for Construction

- » In 2020, DBI authorized the construction of 2,767 units compared to 2,944 units in 2019, which is 6% less than in 2019. This number is also about 39% below the five-year average (4,520).
- » There were fewer projects authorized in 2020: 352 compared to 556 projects in 2019. In 2020, the average number of units per project citywide was 8 units, which is below the average number of units per project over the last five-year period between 2016 and 2020 (10).

Table 4 summarizes the number of projects and units by building type authorized for construction by the DBI.

- » The majority of units authorized for construction in 2020 (82%) involve projects with 20 units or more.
- » Major projects authorized for construction during the reporting year include: 1051 3rd Street (258 units); 921 Howard Street (203 units); and 474 O'Farrell Street (176 units).

Appendix A-5 lists all projects with 10 or more units authorized for construction in 2020.

## Demolitions

- » A total of 352 units were demolished in 2020.
- » The demolition of the 352 units in 2020 is 197% above the five-year demolition average of 118 units. This increase is the result of demolition permits pulled for rebuilding of public housing. An example of this are the permits pulled for the 200 Cameron Way project.

Table 5 shows the units demolished between 2016 and 2020 by building type and Table 6 shows the demolitions in 2020 by Zoning District.

It should be noted that city policies require a minimum of one-to-one replacement of demolished housing.

## Alterations and Conversions

The majority of building permits issued by DBI are for residential alterations. These alteration permits are for improvements within existing buildings or dwelling units. Some alterations expand the building envelope without increasing the number of units in the building. The *Housing Inventory* is primarily concerned with alterations that result in a net loss or gain in the total number of units in the housing stock.

Dwelling units are gained by additions to existing housing structures, conversions to residential use, and legalization of illegal units. Dwelling units are lost by merging separate units into larger units, by conversion to commercial use, or by the removal of illegal units.

The net gain of 439 units from alterations in 2020 is comprised of 445 units added and 6 units eliminated.

- » Units gained through alterations increased 12% from the previous year – 445 units in 2020 compared to 397 units in 2019.
- » 197 units of alterations in 2020 are new accessory dwelling units or legalized secondary units.
- » Of the 6 units lost through alteration in 2020, five (5) units were lost due to mergers and one (1) was a unit conversion. This represents a 71% decrease in units lost through alterations from 2019 (21).

Table 7 shows the number of units added or eliminated through alteration permits from 2016 to 2020. Table 8 profiles the type of alterations and demolitions that caused the loss of units during the same period.

- » The net total of 358 units lost in 2020 due to demolition or alteration is 124% more than the net total lost in 2019 (160).

**TABLE 5.****Units Demolished by Building Type, 2016–2020**

Year	Buildings	Units by Building Type				Total
		<i>Single</i>	<i>2 Units</i>	<i>3 to 4 Units</i>	<i>5+ Units</i>	
2016	17	14	0	8	8	30
2017	14	11	4	3	0	18
2018	25	22	4	0	27	53
2019	27	9	0	12	118	139
2020	50	8	2	0	342	352
<b>TOTAL</b>	<b>133</b>	<b>64</b>	<b>10</b>	<b>23</b>	<b>495</b>	<b>592</b>

Source: Planning Department; Department of Building Inspection

**TABLE 6.****Units Demolished by Zoning District, 2020**

Zoning District	Buildings	Units		Total	Percent of Total
		<i>Single Family</i>	<i>Multi-Family</i>		
RH-1	3	3	0	3	1%
RH-2	3	2	2	4	1%
RH-3	1	1	0	1	0%
RM-1	35	2	250	252	72%
RM-2	8		92	92	26%
<b>TOTAL</b>	<b>50</b>	<b>8</b>	<b>344</b>	<b>352</b>	<b>100%</b>

Source: Planning Department; Department of Building Inspection

**TABLE 7.**  
Units Added or Lost Through Alteration Permits, 2016–2020

Year	Units Added	Units Eliminated	Net Change
2016	359	178	<b>181</b>
2017	241	52	<b>189</b>
2018	381	58	<b>323</b>
2019	397	21	<b>376</b>
2020	445	6	<b>439</b>
<b>TOTAL</b>	<b>1,823</b>	<b>315</b>	<b>1,508</b>

Source: Planning Department; Department of Building Inspection

**TABLE 8.**  
Units Lost Through Alterations and Demolitions, 2016–2020

Year	Alterations					Units Demolished	Total Units Lost
	<i>Illegal Units Removed</i>	<i>Units Merged into Larger Units</i>	<i>Correction to Official Records</i>	<i>Units Converted</i>	<i>Total Alterations</i>		
2016	72	16	12	78	178	30	<b>208</b>
2017	44	4	2	2	52	18	<b>70</b>
2018	31	5	21	1	58	53	<b>111</b>
2019	18	3	0	0	21	139	<b>160</b>
2020	0	5	0	1	6	352	<b>358</b>
<b>TOTAL</b>	<b>165</b>	<b>33</b>	<b>35</b>	<b>82</b>	<b>315</b>	<b>592</b>	<b>907</b>

Source: Planning Department; Department of Building Inspection

## Accessory Dwelling Units

Accessory Dwelling Units (ADUs), also known as secondary units, in-law units, or cottages, are independent dwelling units added to existing residential buildings. ADUs are subordinate to the primary residential unit(s), generally due to the location or size of the ADU. These units can either be developed within the existing building, as an extension to the existing building, or as an entirely separate structure.

As part of an effort to address growing housing demands, the ADU program offers homeowners and contractors a way to add a unit to an existing residential building. By legally adding a unit, a homeowner potentially subsidizes their mortgage by creating a rental apartment, or enables the creation of a multi-generational household.

A property owner or landlord can also turn under-utilized spaces within an existing apartment building into additional dwelling units, and as a result, increase housing options for residents.

- » In 2020, 133 ADUs were completed. 90 ADUs were added in buildings with two to four units, and 91 ADUs were added in building with five or more units.

The legalization program also allows legalizations of existing ADUs without any prior evidence. This voluntary program allows property owners to formally register and rent their unwarranted units in San Francisco, and to ensure that each unit meets safety conditions.

- » In 2020, 55 illegal secondary units were legalized through the legalization program. Approximately 87% of these legalized units were in buildings with two to four units.

Table 9 shows the number of ADUs added and Table 9A shows the number of ADUs legalized in 2020. Table 10 shows the number of ADUs added and legalized by building type in 2020.

**TABLE 9.**  
Accessory Dwelling Units Added, 2017-2020

Year	ADUs Completed
2017	23
2018	79
2019	177
2020	133
<b>TOTAL</b>	<b>412</b>

**TABLE 9A.**  
Accessory Dwelling Units Legalized, 2017-2020

Year	Legalizations	Legalizations through Ordinance 43-14
2017	11	76
2018	22	62
2019	14	93
2020	9	55
<b>TOTAL</b>	<b>56</b>	<b>286</b>

**TABLE 10.**  
Accessory Dwelling Units Added and Legalized through Ordinance by Building Type, 2017-2020

Year	Buildings	Units by Building Type				Total
		<i>Detached Unit</i>	<i>2 to 4 Units</i>	<i>5 to 9 Units</i>	<i>10+ Units</i>	
2017	91	-	64	20	15	<b>99</b>
2018	110	5	61	24	51	<b>141</b>
2019	199	-	121	59	90	<b>270</b>
2020	152	7	90	45	46	<b>188</b>
<b>TOTAL</b>	<b>552</b>	<b>12</b>	<b>336</b>	<b>148</b>	<b>202</b>	<b>698</b>

Source: Planning Department, Department of Building Inspection

Note: The building type is defined by the total number of units in the structure after net new units have been added.

## Additional Units Proposed Through Density Bonus Programs

The California State Density Bonus Law offers development incentives to projects that provide on-site affordable housing. In 2017, the City established the Individually Requested State Density Bonus Program, which incorporates additional requirements and standards for local implementation of the State Program. The housing project utilizing this program must comply with the Inclusionary Affordable Housing Requirement, but the project may only seek a bonus at a single income level. The State Program offers projects the right to receive up to three incentives or concessions that are required to provide for affordable housing costs. A concession or incentive can be a reduction in site development standards, or a modification of zoning code requirements, approval of mixed-use zoning, or other regulatory concessions or incentives.

HOME-SF is an optional local density bonus program that may be used by applicants in lieu of the State Program to construct mixed-income projects with a higher percentage of inclusionary units in certain areas of San Francisco. Under this program, 20 to 30 percent of the units in a new housing project must be affordable to low, middle, and moderate-income families. To provide more family friendly housing, 40 percent of the total units in the building must be two bedrooms or larger. In return, density bonuses and zoning modifications are provided, thus allowing project sponsors to accommodate additional affordable units.

Of all the density bonus projects filed, only one project has been completed as of December 2020 (333 12th Street), adding 200 units to the housing production in year 2020.

- » As of December 2020, 60 projects were in the pipeline for the State Density Bonus Program. These projects propose adding 6,577 units to the housing stock.
- » As of December 2020, 17 projects were in the pipeline for the HOME-SF Density Bonus Program. These projects propose adding 920 units to the housing stock.

Table 11 on the following page shows the number of units associated with density bonus projects in the pipeline. Table 12 on the following page shows the number of projects in different stages of application as of December 2020. Table A-6 in Appendix A lists the density bonus projects in the pipeline and any associated waivers or incentives and concessions.

**TABLE 11.****Density Bonus Projects in the Pipeline by Total Units as of December 2020**

Program	Projects	Units			Percent of Total Units With Bonus
		<i>Total Units Before Bonus</i>	<i>Total Units With Bonus</i>	<i>Affordable Units</i>	
State Density Bonus	60	5228	6577	1949	<b>88%</b>
HOME-SF Density Bonus	17	650	920	230	<b>12%</b>
<b>TOTAL</b>	<b>77</b>	<b>5878</b>	<b>7,497</b>	<b>2,179</b>	

Source: Planning Department, Department of Building Inspection

Note: Unit counts may change as the application moves through different stages in the process of entitlement. In addition, because some of these applications are in very early stages, information such as affordable housing units or total number of units before or after bonus is not available.

**TABLE 12.****Density Bonus Projects in the Pipeline by Status of Application as of December 2020**

Program	Projects	Status of Application			
		<i>PPA Filed</i>	<i>Under Review</i>	<i>Entitled</i>	<i>Building Permit Issued</i>
State Density Bonus	60	10	38	2	10
HOME-SF Density Bonus	17	2	14	1	0
<b>TOTAL</b>	<b>77</b>	<b>12</b>	<b>52</b>	<b>3</b>	<b>10</b>

Source: Planning Department, Department of Building Inspection

**TABLE 13.****Gross Housing Units Built by Building Type, 2016–2020**

Year	Single Family	2 Units	3 to 9 Units	10 to 19 Units	20+ Units	Total
2016	66	68	106	76	4,579	<b>4,895</b>
2017	48	138	214	68	4,043	<b>4,511</b>
2018	37	108	95	110	2,340	<b>2,690</b>
2019	93	171	196	87	4,311	<b>4,585</b>
2020	34	144	149	126	3,949	<b>4,402</b>
<b>TOTAL</b>	<b>278</b>	<b>629</b>	<b>760</b>	<b>467</b>	<b>19,222</b>	<b>21,356</b>
<b>Share of Total Units Added, 2016-2020</b>	<b>1.3%</b>	<b>2.9%</b>	<b>3.6%</b>	<b>2.2%</b>	<b>90.0%</b>	<b>100%</b>

Source: Planning Department

## New Housing Unit Trends

New construction and residential conversions are the primary engine behind changes to the housing stock. This section examines units added to the housing stock over the past five years by looking at the types of buildings and the Zoning Districts where they occurred. For 2020, this section examines all units added to the housing stock including ADUs, not just those added through new construction.

### Types of Buildings

- » Ninety percent (90%) of new housing units added over the last 5 years involve buildings with 20 or more units.
- » Thirty-four (34) single-family units were added in 2020 compared to 93 units in 2019, which is a 63% decrease from the previous year. Single-family building construction made up a very small proportion of new construction in the past five years (1.3%).
- » Fewer units were added in the “Single Family” category in 2020 than in the previous four years (amounts ranging from 37 to 93 units were added each year between 2016 and 2019).

- » The share of units added in high-density buildings (20 or more units) matches the five-year average of 90%.

Table 13 on the opposite page shows new construction from 2016 through 2020 by building type.

### New Housing Units Added by Zoning District

Approximately 55% of units added in 2020 were in Mixed Use zoning districts. Commercial zoning districts made up 27% of the total units added, Residential, House and Mixed zoning districts contributed 11%, and Public zoning districts followed with 6% of total units added.

Table 14 summarizes new units added in 2020 by generalized Zoning Districts. Table 15 lists the number of units constructed in various Zoning Districts in the City. A complete list of San Francisco’s Zoning Districts is included in Appendix C.

**TABLE 14.**  
**New Housing Units**  
**Added by**  
**Generalized**  
**Zoning, 2020**

General Zoning Districts	Units	Percent of Total	Rank
Commercial (RC, C-3-G, C-3-O(SD))	1200	27%	2
Mixed Use (CMUO, CRNC, NC, NCT, RC, Etc.)	2438	55%	1
Public	280	6%	4
Residential, House and Mixed (RED, RH, RM, RTO)	484	11%	3
<b>TOTAL</b>	<b>4,402</b>	100%	

Source: Planning Department

**TABLE 15.**  
**New Housing Units Added by Zoning District, 2020**

Zoning Districts	Units	Percent of Total	Rank
C-2	53	1%	14
C-3-G	998	23%	1
C-3-R	149	3%	9
CRNC	1	0%	29
MUG	39	1%	19
MUR	215	5%	7
NC-1	4	0%	28
NC-2	51	1%	16
NC-3	66	1%	13
NCD	28	1%	20
NCT	257	6%	6
PDR-1-D	280	6%	5
RC-3	41	1%	18
RC-4	16	0%	23
RED	1	0%	30
RED-MX	22	0%	21
RH DTR	182	4%	8
RH-1	68	2%	12
RH-1(D)	12	0%	24
RH-2	303	7%	4
RH-3	49	1%	17
RM-1	52	1%	15
RM-2	21	0%	22
RM-3	6	0%	26
RM-4	75	2%	11
RTO	8	0%	25
RTO-M	6	0%	27
TB DTR	392	9%	3
UMU	902	20%	2
WMUG	105	2%	10
<b>TOTAL</b>	<b>4,402</b>	<b>100%</b>	

Source: Planning Department



## Condominiums

All condominium developments, whether new construction or conversions, are recorded with the Department of Public Works's (DPW) Bureau of Street-Use and Mapping (BSM). Annual condominium totals recorded by DPW do not directly correlate with annual units completed and counted as part of the *Housing Inventory* because DPW's records may be for projects not yet completed or from projects completed in a previous year. Large multi-unit developments also file for condominium subdivision when they are first built even though the units may initially be offered for rent. Condominium construction, like all real estate, is subject to market forces and varies from year to year.

### New Condominiums Recorded

- » New condominiums recorded in 2020 comprised of 6,987 units compared to 4,327 units in 2019, a 61% increase from the previous year.
- » Approximately 98% of the condominiums recorded were in buildings with 20 or more units (6,854 units which represented a 58% increase from 2019).

Table 16 shows construction of new condominiums recorded by DPW over the past ten years and Table 17 shows new condominium construction by building type over the past five years.

**TABLE 16.**  
New Condominiums Recorded by DPW, 2011–2020

Year	Units	% Change from Previous Year
2011	1,625	121%
2012	976	-40%
2013	2,586	165%
2014	1,977	-24%
2015	2,099	6%
2016	2,019	-4%
2017	3,216	59%
2018	3,123	55%
2019	4,327	39%
2020	6,987	61%
<b>TOTAL</b>	<b>23,517</b>	

Source: Department of Public Works, Bureau of Street-Use and Mapping

**TABLE 17.**  
New Condominiums Recorded by the DPW by Building Type, 2016–2020

Year	2 Units	3 to 4 Units	5 to 9 Units	10 to 19 Units	20+ Units	Total
2016	18	29	0	77	1,895	2,019
2017	22	12	38	28	3,116	3,216
2018	20	42	25	56	2,980	3,123
2019	40	47	53	48	4,139	4,327
2020	20	38	59	16	6,854	6,987
<b>TOTAL</b>	<b>120</b>	<b>168</b>	<b>175</b>	<b>225</b>	<b>18,984</b>	<b>19,672</b>

Source: Department of Public Works, Bureau of Street-Use and Mapping

## Condominium Conversions

The San Francisco Subdivision Code regulates condominium conversions. Since 1983, conversions of units from rental to condominium have been limited to 200 units per year and to buildings with six or fewer units. More than 200 units may be recorded in a given year because units approved in a previous year may be recorded in a subsequent year. The 200-unit cap on conversions can also be bypassed for two-unit buildings with owners occupying both units.

- » Condominium conversions decreased by 48% in 2020 (201 from 387 conversions in 2019). This number is 52% lower than the 10-year average of 421 units.
- » About 52% of units converted in 2020 occurred in two-unit buildings, followed by 23% occurring in 5 to 6-unit buildings.
- » Sixty-five percent (65%) of the condominium conversions in 2020 (131) were in buildings with two or three units, consistent with past trend of 60-80% from 2014 through 2019.

Table 18 shows the number of conversions recorded by DPW from 2011-2020. Table 19 shows condominium conversions by building type over the past five years.

**TABLE 18.**  
Condominium Conversions Recorded by DPW, 2011–2020

Year	Units	% Change from Previous Year
2011	472	-12%
2012	488	3%
2013	369	-24%
2014	730	98%
2015	661	-9%
2016	417	-37%
2017	296	-29%
2018	191	-35%
2019	387	103%
2020	201	-48%
<b>TOTAL</b>	<b>4,212</b>	

Source: Department of Public Works, Bureau of Street-Use and Mapping

**TABLE 19.**  
Condominium Conversions Recorded by DPW by Building Type, 2016–2020

Year	2 Units	3 Units	4 Units	5 to 6 Units	Total
2016	118	120	80	99	417
2017	118	72	48	58	296
2018	86	48	12	45	191
2019	238	69	40	40	387
2020	104	27	24	46	201
<b>TOTAL</b>	<b>664</b>	<b>336</b>	<b>204</b>	<b>288</b>	<b>1,492</b>

Source: Department of Public Works, Bureau of Street-Use and Mapping

## Residential Hotels

Residential hotels in San Francisco are regulated by Administrative Code Chapter 41 – the Residential Hotel Conversion and Demolition Ordinance (HCO), enacted in 1981. DBI Housing Inspection Services Division administers the HCO. This ordinance preserves the stock of residential hotels and regulates the conversion and demolition of residential hotel units.

Table 20 reports the number of residential hotel buildings and units for both for-profit and nonprofit residential hotels from 2016 through 2020.

- » As of 2020, 19,069 residential hotel rooms are registered in San Francisco; 65% are residential rooms in for-profit residential hotels and 35% are residential in non-profit hotels.

**TABLE 20.**  
**Changes in Residential Hotel Stock, 2016–2020**

Year	For Profit Residential Hotels			Non-Profit Residential Hotels		Total	
	<i>Buildings</i>	<i>Resid. Rooms</i>	<i>Tourist Rooms</i>	<i>Buildings</i>	<i>Resid. Rooms</i>	<i>Buildings</i>	<i>Resid. Rooms</i>
2016	403	13,247	2,732	95	5,781	<b>498</b>	<b>19,028</b>
2017	392	12,498	2,526	109	6,541	<b>501</b>	<b>19,039</b>
2018	397	12,710	2,674	106	6,489	<b>503</b>	<b>19,199</b>
2019	394	12,490	2,555	110	6,709	<b>504</b>	<b>19,199</b>
2020	389	12,424	2,509	114	6,645	<b>503</b>	<b>19,069</b>

Source: Department of Building Inspection

# Affordable Housing

## Standards and Definitions of Affordability

Affordable housing by definition is housing that is either rented or owned at prices affordable to households with low to moderate incomes. The United States Department of Housing and Urban Development (HUD) determines the thresholds by household size for these incomes for the San Francisco HUD Metro Fair Market Rent Area (HFMA). The HFMA includes San Francisco, Marin, and San Mateo counties. The standard definitions for housing affordability by income level are as follows:

Extremely low income: Units affordable to households with incomes at or below 30% of the HUD median income for the San Francisco HFMA;

Very low income: Units affordable to households with incomes at or below 50% of the HUD median income for the San Francisco HFMA;

Lower income: Units affordable to households with incomes at or below 60% of the HUD median income for the San Francisco HFMA;

Low income: Units affordable to households with incomes at or below 80% of the HUD median income for the San Francisco HFMA,

Moderate income: Units affordable to households with incomes at or below 120% of the HUD median income for the San Francisco HFMA; and

Market rate: Units at prevailing prices without any affordability requirements. Market rate units generally exceed rental or ownership affordability levels, although some small market rate units may be priced at levels that are affordable to moderate income households.

Housing affordability for units is calculated as follows:

Affordable rental unit: A unit for which rent equals 30% of the income of a household with an income at or below 80% of the HUD median income for the San Francisco HFMA, utilities included.

Affordable ownership unit: A unit for which the mortgage payments, PMI (principal mortgage insurance), property taxes, homeowners dues, and insurance equal 33% of the gross monthly income of a household earning between 80% and 120% of the San Francisco HFMA median income (assuming a 10% down payment and a 30-year 8% fixed rate loan).

Inclusionary Affordable Housing Program —  
Ownership Units: These are units for which the mortgage payments, PITI (principal, interest, taxes and insurance), and homeowners association dues equal less than 38% of the gross monthly income of a household earning between 80% and 120% of the San Francisco HFMA median income (assuming a 5% down payment and a 30-year fixed mortgage at the current market interest rate).

Inclusionary Affordable Housing Program —  
Rental Units: These units are rental units for households earning between 28% and 60% of Area Median Income.

Tables 21 and 22 show the incomes and prices for affordable rental and ownership units based on 2020 HUD income limits.

**TABLE 21.**  
**2020 Rental Affordable Housing Guidelines**

Income Levels	Household Size	Average Unit Size	Maximum Annual Income	Monthly Rent
<b>Extremely Low Income</b> (30% of HUD Median Income)	1	Studio	\$26,900	\$622
	2	1 Bedroom	\$30,750	\$698
	3	2 Bedroom	\$34,600	\$774
	4	3 Bedroom	\$38,450	\$849
	5	4 Bedroom	\$41,500	\$896
	6	5 Bedroom	\$44,600	\$952
<b>Very Low Income</b> (50% of HUD Median Income)	1	Studio	\$44,850	\$1,070
	2	1 Bedroom	\$51,250	\$1,210
	3	2 Bedroom	\$57,650	\$1,350
	4	3 Bedroom	\$64,050	\$1,489
	5	4 Bedroom	\$69,200	\$1,588
	6	5 Bedroom	\$74,300	\$1,695
<b>Lower Income</b> (60% of HUD Median Income)	1	Studio	\$53,800	\$1,294
	2	1 Bedroom	\$61,500	\$1,467
	3	2 Bedroom	\$69,200	\$1,639
	4	3 Bedroom	\$76,850	\$1,809
	5	4 Bedroom	\$83,000	\$1,933
	6	5 Bedroom	\$89,150	\$2,066
<b>Low Income</b> (80% of HUD Median Income)	1	Studio	\$71,700	\$1,742
	2	1 Bedroom	\$82,000	\$1,979
	3	2 Bedroom	\$92,250	\$2,215
	4	3 Bedroom	\$102,500	\$2,451
	5	4 Bedroom	\$110,700	\$2,626
	6	5 Bedroom	\$118,900	\$2,810

**Source:** U.S. Department of Housing and Urban Development (HUD)

**Note:** Incomes are based on the 2020 Area Median Income (AMI) limits for the San Francisco HUD Metro FMR Area (HMFA). Rents are calculated based on 30% of gross monthly income.  
(FMR = Fair Market Rents)

**TABLE 22.**  
**2020 Homeownership Affordable Housing Guidelines**

Income Levels	Household Size	Average Unit Size	Maximum Annual Income	Monthly Housing Expense	Maximum Purchase Price
<b>Low Income</b> <i>(70% of HUD Median Income)</i>	1	Studio	\$62,750	\$1,726	N/A
	2	1 Bedroom	\$71,750	\$1,973	N/A
	3	2 Bedroom	\$80,700	\$2,219	N/A
	4	3 Bedroom	\$89,650	\$2,465	N/A
	5	4 Bedroom	\$96,850	\$2,663	N/A
<b>Median Income</b> <i>(90% of HUD Median Income)</i>	1	Studio	\$80,700	\$2,219	N/A
	2	1 Bedroom	\$92,250	\$2,537	N/A
	3	2 Bedroom	\$103,750	\$2,853	N/A
	4	3 Bedroom	\$115,300	\$3,171	N/A
	5	4 Bedroom	\$124,500	\$3,424	N/A
<b>Moderate Income</b> <i>(110% of HUD Median Income)</i>	1	Studio	\$98,600	\$2,712	N/A
	2	1 Bedroom	\$112,750	\$3,101	N/A
	3	2 Bedroom	\$126,850	\$3,488	N/A
	4	3 Bedroom	\$140,900	\$3,875	N/A
	5	4 Bedroom	\$152,200	\$4,186	N/A

**Source:** U.S. Department of Housing and Urban Development (HUD)

**Note:** Incomes are based on the 2020 Area Median Income (AMI) limits for the San Francisco HUD Metro FMR Area (HMFA). Monthly housing expenses are calculated based on 33% of gross monthly income. (FMR = Fair Market Rents). Maximum purchase price is the affordable price from San Francisco's Inclusionary Housing Program and incorporates monthly fees and taxes into sales price. Maximum Purchase Price is not available for the year 2020.

## New Affordable Housing Construction

Table 23 shows the production of affordable housing by levels of affordability and Table 24 shows new affordable housing by type. These numbers do not include affordable units that result from acquiring and rehabilitating residential buildings by nonprofit housing organizations. Those units are covered later in the report.

- » In 2020, 818 affordable housing units were completed compared to 1,456 units in 2019, which is a 44% decrease from the previous year. Of these, 480 are new inclusionary units.
- » The number of affordable units built in 2020 (818) is 21% lower than the five year average of affordable units built (1,037 units).
- » Low-income units represented 56% of the new affordable units that were constructed in 2020; moderate income units made up the remaining 44%. There were no very-low income units constructed in 2020.
- » A total of 133 Accessory Dwelling Units (ADUs) were added to existing residential buildings. Typically, these are smaller units and are sometimes referred to as secondary or “granny” units. These are also usually affordable to households with moderate incomes, however, these units are not income-restricted. In 2020, 130 of the 133 ADUs added qualified as affordable units.

Major affordable housing projects completed in 2020 include: 1150 3rd Street (100% affordable with 118 low-income units), 455 Fell Street (100% affordable, with 107 low-income units), and 1296 Shotwell Street (100% affordable with 93 low-income units).

Major (20 or more units) new affordable housing projects completed in 2020 are detailed in Appendix A-2. On-site affordable inclusionary units are listed under major market rate projects in Appendix A-1. Affordable housing projects under construction, or in pre-construction or preliminary planning with either the Mayor’s Office of Housing and Community Development or the Office of Community Investment and Infrastructure are presented in Appendix A-7.

**TABLE 23.****New Affordable Housing Construction by Income Level, 2016–2020**

Year	Extremely Low (30% AMI)	Very Low (50% AMI)	Low (80% AMI)	Moderate (120% AMI)	Total Affordable Units	Total All New Units*	% of All New Units
2016	120	128	364	190	<b>802</b>	4,895	16%
2017	0	686	558	222	<b>1,466</b>	4,511	32%
2018	0	40	401	204	<b>645</b>	2,690	24%
2019	0	880	335	241	<b>1,456</b>	4,858	30%
2020	0	0	458	360	<b>818</b>	4,044	20%
<b>TOTAL</b>	<b>120</b>	<b>1,734</b>	<b>2,116</b>	<b>1,217</b>	<b>5,187</b>	<b>20,998</b>	<b>25%</b>

Source: Planning Department, Mayor's Office of Housing and Community Development

\*From 2016, 65 of these units, from 2017, 99 of these units, and from 2018, 141 of these units, from 2019, 177, and from 2020, 129 of these units are considered "secondary units" or ADUs and are not income-restricted

**TABLE 24.****New Affordable Housing Construction by Housing Type, 2016–2020**

Year	Family	Senior	Individual/SRO	Homeowner	Other	Total
2016	452	147	20	118	65	<b>802</b>
2017	1,116	39	55	157	99	<b>1,466</b>
2018	434	-	19	51	141	<b>645</b>
2019	1,122	93	-	64	177	<b>1,456</b>
2020	N/A	N/A	N/A	N/A	N/A	N/A
2020 Percent of Total	N/A	N/A	N/A	N/A	N/A	N/A

Source: Planning Department, Mayor's Office of Housing

Note: Family units include projects with a majority of two or more bedroom units. Individual / SRO includes projects with a majority of or one bedroom, residential care facilities, shelters, and transitional housing.

The category "Other" signifies the units that are considered "secondary units" or ADUs and are not income-restricted.

NOTE: DUE TO DATA QUALITY ISSUES, STARTING IN 2020, TABLE 24 IS BEING DEPRECATED AS PART OF PROCESS IMPROVEMENTS.



## Inclusionary Housing

In 1992, the Planning Commission adopted guidelines for applying the City's Inclusionary Affordable Housing Policy. This policy required housing projects with 10 or more units that seek a conditional use (CU) permit or planned unit development (PUD) to set aside a minimum of 10% of their units as affordable units. In 2002, the Board of Supervisors legislated these guidelines into law and expanded the requirement to all projects with 10 or more units. In condominium developments, the inclusionary affordable ownership units would be available to households earning up to 100% of the AMI; below market inclusionary rental units are affordable to households earning 60% or less of the area median income (AMI). If a housing project required a conditional use permit, then 12% of the units would need to be made available at the same levels of affordability.

In 2006, the inclusionary requirements were increased to 15% if units were constructed on-site, and to 20% if constructed off-site and is applicable to projects of five units or more. In 2013, the inclusionary requirements were changed back to projects with 10 or more units and the on-site requirement went back down to 12%. In August 2017, the inclusionary requirements were changed to 12% of on-site units for projects with 10 to 24 units, and 18% on-site for rental projects with 25 units or more and 20% on-site for ownership projects with 25 units or more. For projects within the Mission Planning Area,

North of Market Residential SUD (Tenderloin), and SoMa NCT (6th Street), the inclusionary requirements are as follows: 25% on-site for rental, 27% on-site for ownership in projects with 25 or more units. These increases apply to new projects without an environmental evaluation initial study on or after January 12th, 2016. Table 25 shows inclusionary units completed from 2016 to 2020.

- » 480 inclusionary units were completed in 2020.
- » In 2020, the number of inclusionary units built (480) represented a 19% increase from that provided in 2019 (405). The number of inclusionary housing units built in 2020 is also 25% above than the five-year annual average of 384 units.

Appendix A-1 provides a complete list of projects with ten or more units constructed in 2020 and details of inclusionary units for those projects that have them.

In Fiscal Year 2020, a total of \$15 million was collected as partial payments of in-lieu fees for projects. Appendix D is a summary of in-lieu fees collected since 2011.

**TABLE 25.**  
**New Affordable Housing Production by Source, 2016-2020**

Year	Inclusionary Units	Units in 100% Affordable Developments	ADUs	Total
2016	449	288	65	802
2017	421	946	99	1,466
2018	163	341	141	645
2019	405	874	177	1,456
2020	480	208	130	818
<b>TOTAL</b>	<b>1,918</b>	<b>2,657</b>	<b>612</b>	<b>5,187</b>

Source: Planning Department, Mayor's Office of Housing and Community Development

**TABLE 26.****Housing Price Trends, San Francisco Bay Area, 2016–2020**

Year	Rental (Two Bedroom Apartment)		For Sale (Two Bedroom House)	
	<i>San Francisco</i>	<i>Bay Area</i>	<i>San Francisco</i>	<i>Bay Area</i>
2016	\$4,870	N/A	<b>\$1,257,500</b>	\$777,160
2017	\$4,500	\$2,846	<b>\$1,469,000</b>	\$910,350
2018	\$4,650	\$2,963	<b>\$1,573,000</b>	\$939,216
2019	\$4,500	\$3,166	<b>\$1,450,000</b>	\$908,750
2020	\$3,570	\$2,110	<b>\$1,581,000</b>	\$1,058,000

**Source:** Zumper.com & Priceconomics for apartment rental prices, California Association of Realtors for home sale prices

**Notes:** The California Association of Realtors Bay Area data do not include Napa and Sonoma Counties

### Affordability of Market Rate Housing

The San Francisco Bay Area remains one of the nation's most expensive housing markets, despite median rents dropping by about 20% in 2020.

- » In 2020, the median rental price for a two-bedroom apartment in San Francisco was \$3,570 compared to \$4,500 in 2019, a 21% decrease from the previous year. This significant drop in rent has been attributed in part to the outward migration of people from the city during the COVID-19 pandemic.
- » The 2020 median rental price for a two-bedroom apartment in San Francisco is 69% higher than the median rental price for the entire Bay Area.
- » In 2020, the median price for a two-bedroom home in San Francisco increased to \$1,581,000. This price is 9% higher than the 2019 median home price (\$1,450,000).

- » A three-person household with a combined household income at 80% of the median income could pay a maximum rent of \$2,215 (according to Table 21) or only about 62% of the median rent (\$3,570).

Table 26 gives rental and sales prices for 2016 through 2020.

## Affordable Housing Acquisition

### and Rehabilitation

Acquisition and rehabilitation involves non-profit housing organizations purchasing existing residential buildings in order to rehabilitate units for low- and very low-income persons. Table 27 shows units that have been rehabilitated through funding by the Mayor's Office of Housing and Community Development (MOHCD) and the Office of Community Investment and Infrastructure (OCII). Often it is more economical to purchase and rehabilitate existing units than to build new units. While many of these units are residential hotel (single room occupancy or SRO) units, acquisition and rehabilitation also includes homes for residential care providers, apartments for families, and conversions of commercial or industrial buildings for homeless persons and families. The *Housing Inventory* reports units in such projects as adding to the housing stock only when new units are created as a result of the rehabilitation.

- » In 2020, the Mayor's Office of Housing and Community Development and the Office of Community Investment and Infrastructure rehabilitated 405 units.

**TABLE 27.**  
**Units Acquired or Rehabilitated, 2016–2020**

Year	Units Acquired / Rehabilitated
2016	152
2017	119
2018	49
2019	181
2020	405
<b>TOTAL</b>	<b>906</b>

Source: Mayor's Office of Housing and Community Development

The City has also strengthened eviction and tenant protections, and preserved the affordability of 563 units across 53 properties through its Small Sites acquisition and rehabilitation program since 2014.

**TABLE 27A.**  
**Details of Units Acquired or Rehabilitated, 2020**

Address	Total Units	Units Acquired / Rehabilitated
3182-3198 24th	8	8
520 Shrader	7	7
937-949 Clay	73	73
3544 Taraval St	6	6
270 Turk St	86	86
2157 Grove St	9	9
1353 Stevenson	7	7
54 McAllister St	100	100
42 Washburn St	22	22
150 9th St	57	57
1045 Capp St	30	30

Source: Mayor's Office of Housing and Community Development

The Mayor's Office of Housing and Community Development implemented the first phase of the Rental Assistance Demonstration (RAD) program in 2015. RAD is a voluntary, permanent conversion of public housing to the Section 8 housing program. Since 2016, 3,443 units of public housing properties were transferred to owner/developer teams to rehabilitate.

**TABLE 27B.**  
**Rental Assistance Demonstration Program, 2016–2020**

Year	Very Low-Income Units Turned Over / Rehabilitated	Low-Income Units Turned Over / Rehabilitated
2016	2,042	118
2017	-	-
2018	934	233
2019	-	-
2020	-	-
<b>TOTAL</b>	<b>3,092</b>	<b>351</b>

Source: Mayor's Office of Housing and Community Development

## Changes in Housing Stock by Geography

This section discusses the City's housing stock by geography. Map 1 shows San Francisco's 15 Planning Districts.

Table 28 summarizes newly constructed units completed, altered units, and units demolished in each Planning District. The table also ranks each Planning District by its position for each of the ratings categories.

- » The South of Market Planning District had the most new construction in 2020 with 1,755 units built or 44% of the total new construction. It lost 93 units through demolition but gained an additional 9 net units added through conversion or alteration, making it the district with the highest net gain of 1,671 net new units or 41% of net new addition Citywide.

- » The Mission (1,077 net new housing units) and Downtown (675 net new housing units) Planning Districts followed South of Market in the highest net new housing units added Citywide.
- » The South Bayshore Planning District had the highest number of units demolished, with 251 units lost or about 71% of the total 352 units that were demolished in 2020.
- » The South Bayshore Planning District gained the least number of units in 2020, adding 21 units but losing 251 units through demolition, resulting in a net loss of 230 units to the housing stock.

Figure 3 on the following page shows total new housing constructed and demolished by San Francisco Planning Districts in 2020.

**MAP 1.**  
San Francisco Planning Districts



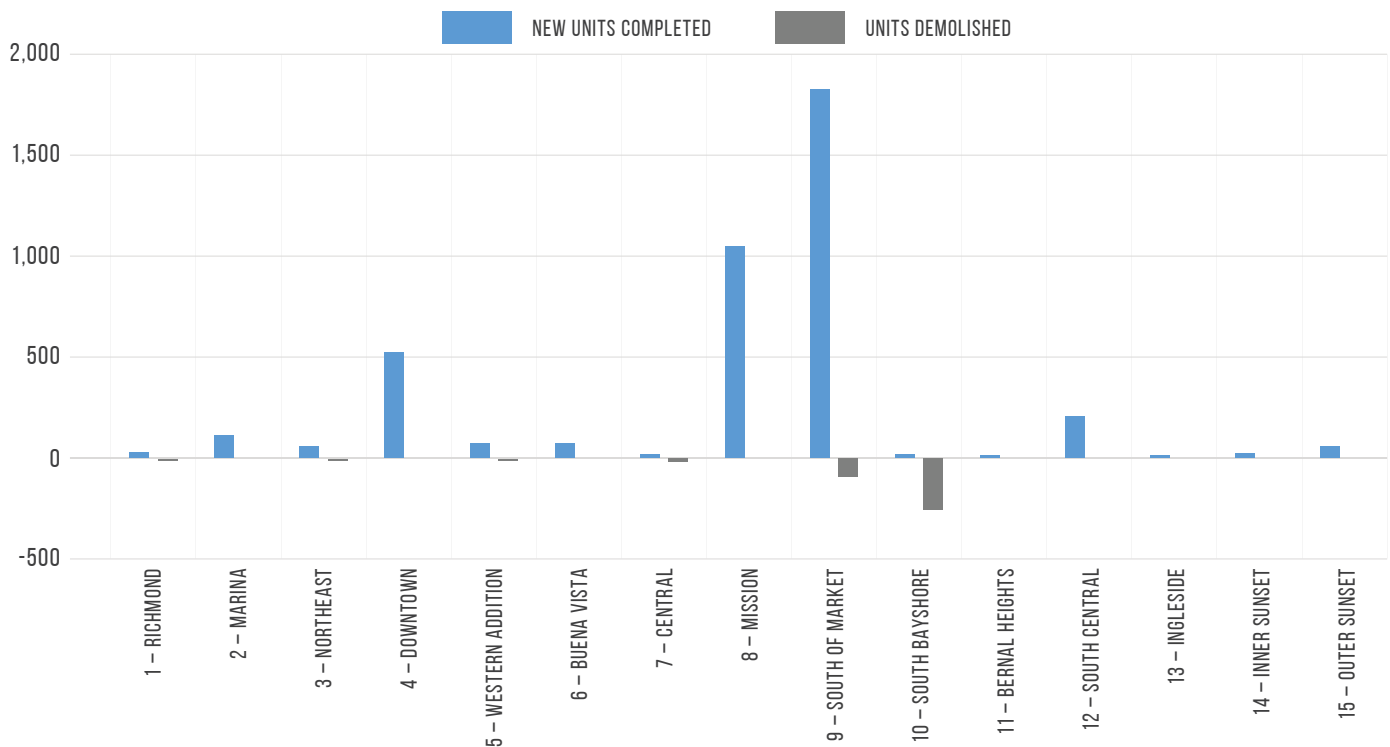
**TABLE 28.**  
Housing Units Completed and Demolished by Planning District, 2020

No.	District Name	New Units Completed	Rank	Units Demolished	Rank	Units Altered	Rank	Net Gain Housing Units	Rank
1	Richmond	23	10	-1	4	47	2	69	10
2	Marina	106	5			4	14	110	5
3	Northeast	56	8	-1	4	32	4	87	8
4	Downtown	523	3			152	1	675	3
5	Western Addition	79	6	-1	4	11	12	89	7
6	Buena Vista	76	7			26	6	102	6
7	Central	8	13	-5	3	14	10	17	13
8	Mission	1,047	2			30	5	1,077	2
9	South of Market	1,755	1	-93	2	9	13	1,671	1
10	South Bayshore	9	12	-251	1	12	11	(230)	15
11	Bernal Heights	3	14			3	15	6	14
12	South Central	204	4			32	3	236	4
13	Ingleside	3	15			18	9	21	12
14	Inner Sunset	15	11			24	8	39	11
15	Outer Sunset	50	9			25	7	75	9
	<b>TOTAL</b>	<b>3,957</b>		<b>(352)</b>		<b>439</b>		<b>4,044</b>	

Source: Planning Department, Department of Building Inspection

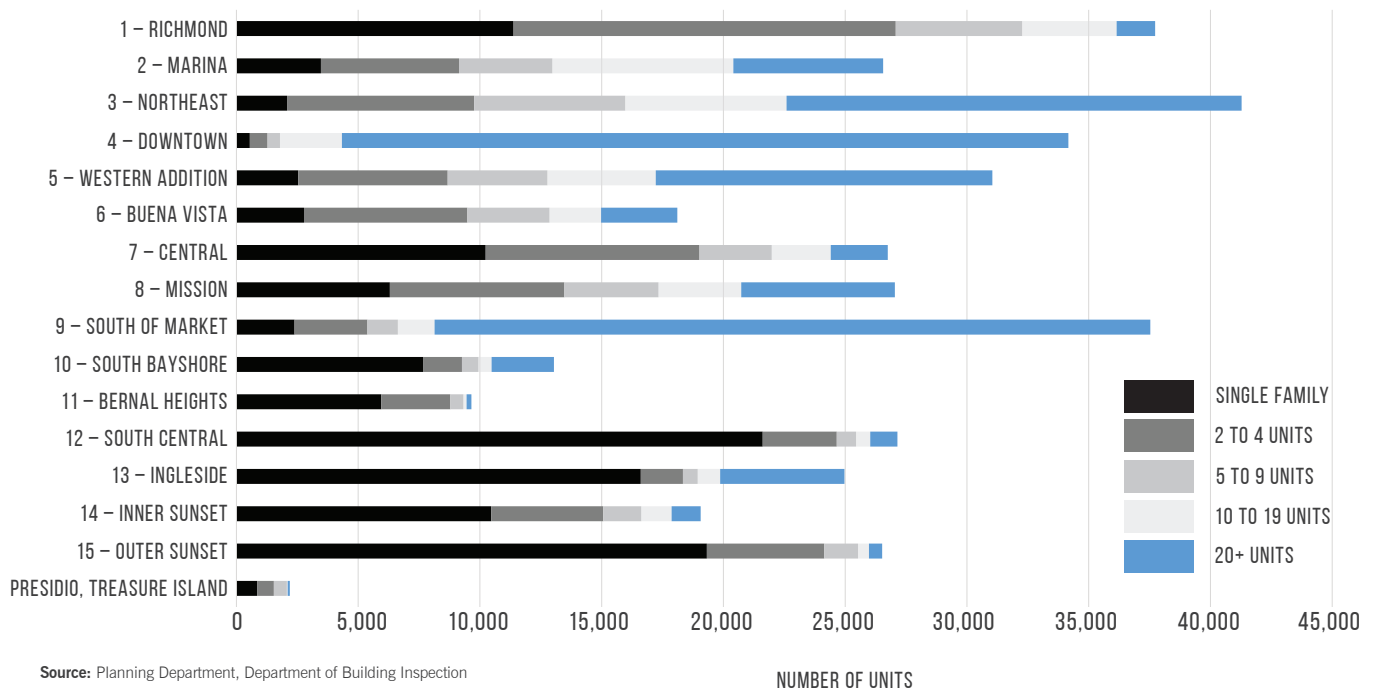
Note: The "net gain housing units" calculation accounts for units lost/gained by alterations but those figures are not displayed.

**FIGURE 3.**  
Units Completed & Demolished by Planning District, 2020



Source: Planning Department, Department of Building Inspection

**FIGURE 4.**  
**San Francisco Net Housing Stock by Planning District, 2020**



## Housing Stock by Planning District

Figure 4 shows the total overall housing stock by building type for the 15 San Francisco Planning Districts. Table 29 contains San Francisco housing stock totals by Planning District and shows the net gain since the 2010 Census.

- » The Northeast and Richmond Planning Districts continue to have the highest number of overall units, having 41,344 units and 37,760 units respectively. The Northeast District accounts for about 10% of the City's housing stock, while the Richmond Planning District accounts for about 9%.
- » The South Central, Outer Sunset, and Ingleside Planning Districts remain the areas with the highest number of single-family homes in San Francisco. Together these areas account for approximately 46% of all single-family homes.
- » The Richmond, Central, Northeast, and Mission Planning Districts are the areas with the highest numbers of buildings with 2 to 4 units, representing 19%, 11%, 10%, and 9% of those units respectively.
- » In the "5 to 9 Units" category, the Northeast, Richmond, Western Addition, and Mission Planning Districts have the highest numbers of those units with 17%, 14%, 11%, and 10% respectively.
- » The Marina, Northeast, Western Addition, and Richmond Planning Districts continue to have the highest share of buildings with 10 to 19 units. Fifty-eight percent (58%) of the City's multi-family buildings with 10 to 19 units are in these districts.
- » The Downtown Planning District has the largest stock of the city's high-density housing – about 29,834 units. The South of Market District closely follows with about 29,394 units. Eighty-seven percent (87%) of all housing in the Downtown Planning District is in buildings with 20 or more units. This district accounts for 24% of all the high-density housing citywide. The South of Market District, with 78% of its units in buildings with 20 units or more, also claims 24% of the City's high-density housing.

**TABLE 29.**  
**San Francisco Net Housing Stock by Planning District, 2010–2020**

Planning District	Single Family	2 to 4 Units	5 to 9 Units	10 to 19 Units	20+ Units	District Total
<b>1 - Richmond</b>						
2010 ACS5	11,388	15,525	5,126	3,845	1,467	<b>37,383</b>
2011-2019	(7)	140	50	10	115	<b>308</b>
2020	(1)	31	18	21	-	<b>69</b>
<b>TOTAL</b>	<b>11,380</b>	<b>15,696</b>	<b>5,194</b>	<b>3,876</b>	<b>1,582</b>	<b>37,760</b>
Percent of Total	30.1%	41.6%	13.8%	10.3%	4.2%	<b>9.4%</b>
<b>2 - Marina</b>						
2010 ACS5	3,469	5,636	3,824	7,404	5,817	<b>26,165</b>
2011-2019	(1)	33	10	26	230	<b>298</b>
2020	2	2	2	1	103	<b>110</b>
<b>TOTAL</b>	<b>3,470</b>	<b>5,671</b>	<b>3,836</b>	<b>7,431</b>	<b>6,150</b>	<b>26,573</b>
Percent of Total	13.1%	21.3%	14.4%	28.0%	23.1%	<b>6.6%</b>
<b>3 - Northeast</b>						
2010 ACS5	2,080	7,621	6,147	6,585	17,965	<b>40,462</b>
2011-2019	1	54	32	39	669	<b>795</b>
2020	(1)	10	22	2	54	<b>87</b>
<b>TOTAL</b>	<b>2,080</b>	<b>7,685</b>	<b>6,201</b>	<b>6,626</b>	<b>18,688</b>	<b>41,344</b>
Percent of Total	5.0%	18.6%	15.0%	16.0%	45.2%	<b>10.2%</b>
<b>4 - Downtown</b>						
2010 ACS5	547	719	494	2,460	24,967	<b>29,348</b>
2011-2019	3	11	15	46	4,229	<b>4,304</b>
2020	-	-	1	36	638	<b>675</b>
<b>TOTAL</b>	<b>550</b>	<b>730</b>	<b>510</b>	<b>2,542</b>	<b>29,834</b>	<b>34,327</b>
Percent of Total	1.6%	2.1%	1.5%	7.4%	86.9%	<b>8.5%</b>
<b>5 - Western Addition</b>						
2010 ACS5	2,535	6,065	4,055	4,381	12,283	<b>29,319</b>
2011-2019	2	66	38	67	1,464	<b>1,637</b>
2020	(1)	10	1	3	76	<b>89</b>
<b>TOTAL</b>	<b>2,536</b>	<b>6,141</b>	<b>4,094</b>	<b>4,451</b>	<b>13,823</b>	<b>31,045</b>
Percent of Total	8.2%	19.8%	13.2%	14.3%	44.5%	<b>7.7%</b>
<b>6 - Buena Vista</b>						
2010 ACS5	2,777	6,633	3,339	2,099	2,062	<b>16,950</b>
2011-2019	-	60	27	11	995	<b>1,093</b>
2020	-	14	8	10	70	<b>102</b>
<b>TOTAL</b>	<b>2,777</b>	<b>6,707</b>	<b>3,374</b>	<b>2,120</b>	<b>3,127</b>	<b>18,145</b>
Percent of Total	15.3%	37.0%	18.6%	11.7%	17.2%	<b>4.5%</b>

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Planning District	Single Family	2 to 4 Units	5 to 9 Units	10 to 19 Units	20+ Units	District Total
<b>7 - Central</b>						
2010 ACS5	10,219	8,671	2,935	2,398	2,167	<b>26,395</b>
2011-2019	16	97	31	22	176	<b>342</b>
2020	4	11	-	2	-	<b>17</b>
<b>TOTAL</b>	<b>10,239</b>	<b>8,779</b>	<b>2,966</b>	<b>2,422</b>	<b>2,343</b>	<b>26,754</b>
Percent of Total	38.3%	32.8%	11.1%	9.1%	8.8%	<b>6.63%</b>
<b>8 - Mission</b>						
2010 ACS5	6,295	7,026	3,797	3,221	4,205	<b>24,566</b>
2011-2019	65	104	42	137	779	<b>1,067</b>
2020	5	126	57	157	1,075	<b>1,420</b>
<b>TOTAL</b>	<b>6,303</b>	<b>7,166</b>	<b>3,865</b>	<b>3,396</b>	<b>6,311</b>	<b>27,063</b>
Percent of Total	23.3%	26.5%	14.3%	12.5%	23.3%	<b>6.7%</b>
<b>9 - South of Market</b>						
2010 ACS5	2,379	2,933	1,207	1,428	14,070	<b>22,061</b>
2011-2019	7	56	38	145	13,597	<b>13,843</b>
2020	-	7	1	(64)	1,727	<b>1,671</b>
<b>TOTAL</b>	<b>2,386</b>	<b>2,996</b>	<b>1,246</b>	<b>1,509</b>	<b>29,394</b>	<b>37,575</b>
Percent of Total	6.3%	8.0%	3.3%	4.0%	78.2%	<b>9.3%</b>
<b>10 - South Bayshore</b>						
2010 ACS5	7,614	1,614	700	514	890	<b>11,404</b>
2011-2019	63	(45)	122	128	1,671	<b>1,939</b>
2020	6	10	(140)	(106)	-	<b>(230)</b>
<b>TOTAL</b>	<b>7,683</b>	<b>1,579</b>	<b>682</b>	<b>536</b>	<b>2,561</b>	<b>13,113</b>
Percent of Total	58.6%	12.0%	5.2%	4.1%	19.5%	<b>3.3%</b>
<b>11 - Bernal Heights</b>						
2010 ACS5	5,926	2,796	537	130	199	<b>9,629</b>
2011-2019	23	35	(1)	-	1	<b>58</b>
2020	2	3	1	-	-	<b>6</b>
<b>TOTAL</b>	<b>5,951</b>	<b>2,834</b>	<b>537</b>	<b>130</b>	<b>200</b>	<b>9,693</b>
Percent of Total	61.4%	29.2%	5.5%	1.3%	2.1%	<b>2.4%</b>
<b>12 - South Central</b>						
2010 ACS5	21,602	3,005	858	589	800	<b>26,866</b>
2011-2019	9	(1)	(64)	(6)	117	<b>55</b>
2020	3	35	-	-	198	<b>236</b>
<b>TOTAL</b>	<b>21,614</b>	<b>3,039</b>	<b>794</b>	<b>583</b>	<b>1,115</b>	<b>27,157</b>
Percent of Total	79.6%	11.2%	2.9%	2.1%	4.1%	<b>6.73%</b>
<b>13 - Ingleside</b>						
2010 ACS5	16,497	1,565	606	900	4,832	<b>24,424</b>
2011-2019	104	154	-	17	274	<b>549</b>
2020	5	13	-	3	-	<b>21</b>
<b>TOTAL</b>	<b>16,606</b>	<b>1,732</b>	<b>606</b>	<b>920</b>	<b>5,106</b>	<b>24,994</b>
Percent of Total	66.4%	6.9%	2.4%	3.7%	20.4%	<b>6.2%</b>

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Planning District	Single Family	2 to 4 Units	5 to 9 Units	10 to 19 Units	20+ Units	District Total
<b>14 - Inner Sunset</b>						
2010 ACS5	10,450	4,528	1,555	1,226	1,188	<b>18,951</b>
2011-2019	10	44	3	16	7	<b>80</b>
2020	2	33	2	2	-	<b>39</b>
<b>TOTAL</b>	<b>10,462</b>	<b>4,605</b>	<b>1,560</b>	<b>1,244</b>	<b>1,195</b>	<b>19,070</b>
Percent of Total	54.9%	24.1%	8.2%	6.5%	6.3%	<b>4.7%</b>
<b>15 - Outer Sunset</b>						
2010 ACS5	19,321	4,750	1,385	442	495	<b>26,427</b>
2011-2019	-	48	1	2	-	<b>51</b>
2020	-	23	-	4	48	<b>75</b>
<b>TOTAL</b>	<b>19,321</b>	<b>4,821</b>	<b>1,386</b>	<b>448</b>	<b>543</b>	<b>26,553</b>
Percent of Total	72.8%	18.2%	5.2%	1.7%	2.0%	<b>6.6%</b>
<b>Presidio, Treasure Island and Golden Gate Park</b>						
2010 ACS5	852	687	523	34	89	<b>2,185</b>
2011-2019	-	-	9	-	-	<b>9</b>
2020	-	-	-	-	-	
<b>TOTAL</b>	<b>852</b>	<b>687</b>	<b>532</b>	<b>34</b>	<b>89</b>	<b>2,194</b>
Percent of Total	38.8%	31.3%	24.2%	1.5%	4.1%	<b>0.5%</b>
<b>Citywide</b>						
2010 ACS5	123,951	79,774	37,088	37,656	93,496	<b>372,535</b>
2011-2019	235	878	368	677	24,620	<b>26,778</b>
2020	24	216	(73)	(68)	3,945	<b>4,044</b>
<b>TOTAL</b>	<b>124,210</b>	<b>80,868</b>	<b>37,383</b>	<b>38,265</b>	<b>122,061</b>	<b>403,357</b>
Percent of Total	30.8%	20.0%	9.3%	9.5%	30.3%	<b>100.0%</b>

Source: Planning Department

## Housing Construction in the Bay Area

This section provides a regional context to the City's housing production trends. San Francisco is one of nine counties that make up the Bay Area.

- » In 2020, Bay Area counties authorized 17,696 units for construction, 22% less than the 2019 authorizations of 22,736 units.
- » Alameda (21%), Santa Clara (20%) and San Francisco (16%) counties accounted for 57% of the total units authorized in 2020.
- » In San Francisco, 99% of new housing is in multi-family buildings. Alameda (69%), Santa Clara (63%), Contra Costa (45%), and San

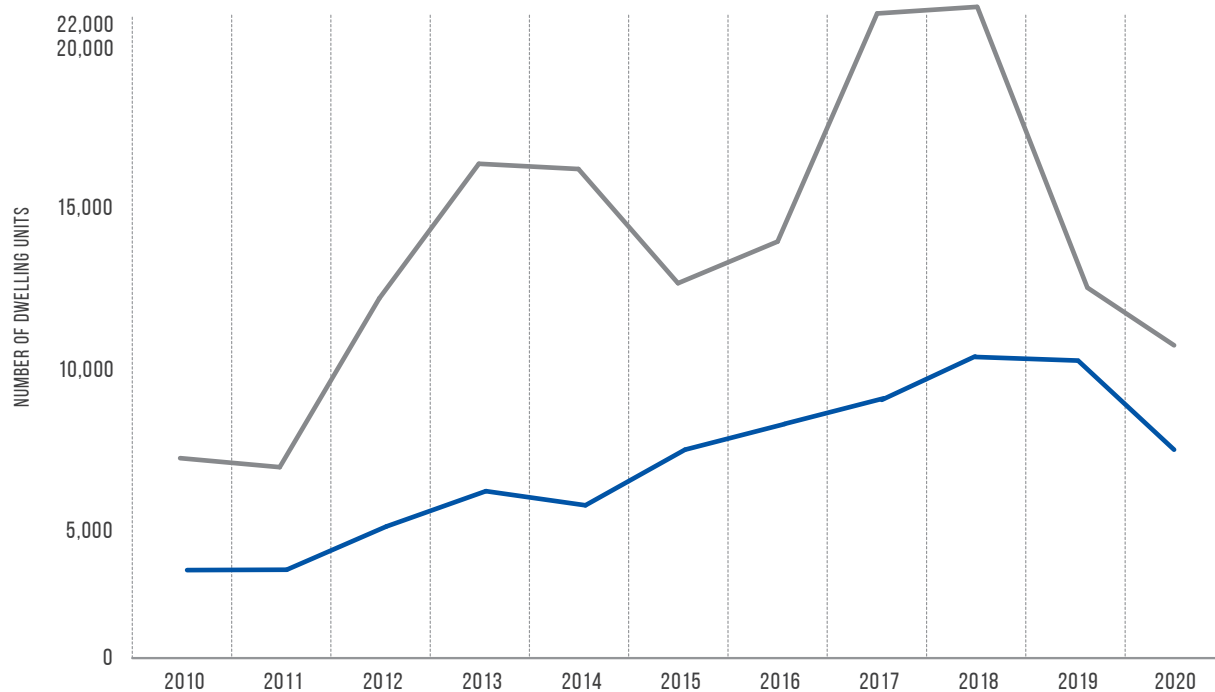
Mateo (44%), also have a high percentage of authorized units in multi-family structures. Single-family housing units predominate in Napa (100%), Marin (97%), and Solano (58%).

The map on page 12 shows the nine counties that make up the Greater San Francisco Bay Area. Table 30 shows the total number of units authorized for construction for San Francisco and the rest of the Bay Area for 2020. Figure 5 shows trends in housing construction by building type from 2011 to 2020.

**TABLE 30.****Units Authorized for Construction for San Francisco and the Bay Area Counties, 2020**

County	Single-Family Units	Multi-Family Units	Total Units	Percent of Total
Alameda	1,153	2,610	<b>3,763</b>	21%
Contra Costa	1,525	1,243	<b>2,768</b>	16%
Marin	96	3	<b>99</b>	1%
Napa	227	0	<b>227</b>	1%
San Francisco	37	2,730	<b>2,767</b>	16%
San Mateo	548	439	<b>987</b>	6%
Santa Clara	1,329	2,243	<b>3,572</b>	20%
Solano	981	716	<b>1,697</b>	10%
Sonoma	1,038	778	<b>1,816</b>	10%
<b>TOTAL</b>	<b>6,934</b>	<b>10,762</b>	<b>17,696</b>	<b>100%</b>

Source: Construction Industry Research Board

**FIGURE 5.****Bay Area Housing  
Construction Trends,  
2011–2020**

Source: California Housing Foundation, from 2007-2013; Construction Industry Research Board, from 2014-2020

# **APPENDICES:** A CLOSER LOOK AT HOUSING IN SAN FRANCISCO

## Appendix A: Project Lists

This Appendix details major projects in various stages of the planning or construction process: projects under Planning Department review, projects that have been authorized for construction by the DBI, and projects that have been completed. A project's status changes over time. During a reporting period, a project may move from approved to under construction or from under construction to completed. Similarly, a project may change from rental to condominiums, or vice versa, before a project is completed or occupied.

**Table A-1** details major market-rate housing projects with ten or more units that were completed in 2020. This list also includes the number of inclusionary units in the project.

**Table A-2** is comprised of major affordable housing projects with twenty or more units that were completed in 2020.

**Table A-3** provides information for all projects with twenty or more units that were fully entitled by the Planning Department in 2020. These projects typically require either a conditional use permit, environmental review, or some other type of review by the Planning Commission or Zoning Administrator, or the Environmental Review Officer.

**Table A-4** provides information for all projects with ten or more units that were filed with the Planning Department in 2020. These projects require a conditional use permit, environmental review, or other types of review by the Planning Commission, Zoning Administrator, or the Environmental Review Officer. This list does not include projects submitted for informal Planning project review and for which no applications have been filed, and only includes fully complete applications accepted for review by the Planning Department.

**Table A-5** contains residential projects with ten or more units authorized for construction by DBI in 2020.

**Table A-6** contains residential projects proposing to utilize a density bonus program.

**Table A-7** is an accounting of affordable housing projects in the “pipeline”— projects that are under construction, or in pre-construction or preliminary planning with either the Mayor’s Office of Housing or the Office of Community Investment and Infrastructure.

**Table A-8** details 2020 housing production in Analysis Neighborhoods as defined by San Francisco Indicator Project (DPH).

## Appendix B: Planning Area Annual Monitoring

Tables in **Appendix B** have been added to the *Housing Inventory* to comply in part with the requirements of Planning Code §341.2 and Administrative Code 10E.2 to track housing development trends in the recently-adopted community area plans. These plan areas also have separate monitoring reports that discusses housing production trends in these areas in greater detail.

**Table B-1** details 2020 housing trends in recently adopted planning areas.

**Table B-2** summarizes the units entitled by the Planning Department in 2020 by planning areas.

**Table B-3** summarizes units gained from new construction in 2020 by planning areas.

**Table B-4** summarizes units demolished in 2020 by planning areas.

**Table B-5** summarizes units lost through alterations and demolitions in 2020 by planning areas.

**Table B-6** summarizes affordable housing projects for 2020 in planning areas.

## Appendix C: San Francisco Zoning Districts

## Appendix D: In-Lieu Housing Fees Collected

## Appendix E: Glossary

**TABLE A-1.**  
**Major Market Rate Housing Projects Completed, 2020**

Address / Project Name	Total Net Units	Affordable Units	Unit Mix	Tenure Type	Initial Sales or Rental Price
49 SOUTH VAN NESS AV/1500 MISSION ST	550	110	NA	Rental	From \$2950+ TO \$7700
160 FOLSOM ST	390	156	NA	Ownership	From \$1,175,000
1066 MARKET ST	303	0	NA	NA	NA
188 HOOPER ST	280	0	NA	Rental	NA
333 12TH ST	200	27	NA	Rental	From \$950+
302 SILVER AV	198	0	NA	Rental	NA
2070 BRYANT ST	194	0	NA	Rental	From \$2421
390 01ST ST	180	22	NA	Rental	From \$2305 TO \$11,080
1301 16TH ST	172	28	STUDIO: 7 1 BEDROOM: 9 2 BEDROOM: 10 3 BEDROOM: 2	Rental	NA
706 MISSION ST	169	0	NA	Ownership	From \$11,340,000
210 ARKANSAS ST	154	60	STUDIO: 15 1 BEDROOM: 18 2 BEDROOM: 24 3 BEDROOM: 4	Rental	From \$2,500-\$7,900
200 VAN NESS AV	145	0	NA	Rental	NA
2171 03RD ST	109	8	NA	Ownership	From \$735,000 TO \$1,395,000
363 06TH ST	104	12	NA	Rental	From \$1,750-\$3,955
345 06TH ST	102	14	NA	Rental	NA
950 TENNESSEE ST	100	0	NA	Ownership	From \$599,000
950 GOUGH ST	95	11	STUDIO: 19 1 BEDROOM: 40 2 BEDROOM: 40	Rental	NA
2290 03RD ST	71	0	NA	Rental	From \$2,800+
777 TENNESSEE ST	59	8	NA	Rental	From \$2,350+
2898 SLOAT BL	56	7	NA	Ownership	NA
2444 LOMBARD ST	43	6	NA	Rental	NA

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Address / Project Name	Total Net Units	Affordable Units	Unit Mix	Tenure Type	Initial Sales or Rental Price
1700 MARKET ST	42	5	NA	Rental	NA
2465 VAN NESS AV	41	0	STUDIO : 41	Rental	NA
119 07TH ST	39	0	NA	Ownership	NA
188 OCTAVIA ST	27	4	STUDIO: 16 2 BEDROOMS: 12	Rental	NA
3620 CESAR CHAVEZ ST	24	0	NA	Ownership	From \$745,000+
2301 LOMBARD ST	22	0	NA	Ownership	NA
1801 MISSION ST	17	2	NA	Rental	From \$2,550 - \$4,500
540 DE HARO ST	16	0	NA	Ownership	From \$1,150,000

Source: Planning Department

**TABLE A-2.**  
**Major Affordable Housing Projects Completed, 2020**

Address	Total Net Units	Affordable Units	Unit Mix	Tenure Type	Price (Rental or Selling)	AMI %	Type of Housing
95 Laguna	79	78	"Studios: 40 One bedroom: 36 Two bedroom: 2"	Rental	"Studio: \$1,000/month One BR: \$1,056-\$1,140/month Two BR: \$1,257-\$1,270/month"	40%-50%	Senior
1296 Shotwell	94	93	"Studios: 24 One bedroom: 69"	Rental	"Studio: \$266-\$1,021/month One BR: \$300-\$1,162/month"	15%-50%	Senior
455 Fell St	108	107	"Studios: 1 One bedroom: 57 Two bedroom: 41 Three bedroom: 8"	Rental	"Studio: \$1,187/month One BR: \$1,306-\$1,351/month Two BR: \$1,502/month Three BR: \$1,647/month"	20%-60%	Family
1601 Mariposa	299	60	"Studios: 15 One bedroom: 18 Two bedroom: 23 Three bedroom: 4"	Rental	"Studio: \$1,021/month One BR: \$1,141-\$1,163/month Two BR: \$1,292/month Three BR: \$1,417/month"	40%-50%	Family
250 Fremont	80	79	"One bedroom: 39 Two bedroom: 16 Three bedroom: 24"	Rental	"One BR: \$1,118/month Two BR: \$1,244/month Three BR: \$1,365/month"	50%	Family
1150 3rd St	119	118	"Studios: 12 One bedroom: 55 Two bedroom: 30 Three bedroom: 21"	Rental	"One BR: \$1,170-\$1,417/month Two BR: \$1,306-\$1,583/month Three BR: \$1,441-\$1,749/month"	50%-60%	Family and Veterans
1491 Sunnydale Ave	55	54	"Studios: 3 One bedroom: 19 Two bedroom: 18 Three bedroom: 14"	Rental	"Studio: \$1,021/month One BR: \$1,162/month Two BR: \$1,289/month Three BR: \$1,414/month"	45%-60%	Family
1550 Mission St	550	110	"Studios: 40 One bedroom: 29 Two bedroom: 39 Three bedroom: 2"	Rental	"Studio: \$1,021/month One BR: \$1,141-\$1,163/month Two BR: \$1,292/month Three BR: \$1,417/month"	40%-50%	Family

Source: Planning Department, Mayor's Office of Housing and Community Investment; Office of Community Investment and Infrastructure

\* Units affordable to middle-income households (120% - 150% AMI), are not counted towards meeting the City's Regional Housing Needs Allocation (RHNA) goals.

TABLE A-3.

## Major Housing Projects Reviewed and Entitled by Planning Department, 2020

Planning Case No.	Address / Project Name	Case Description	Net No. Units	Approval Date	Action
2014-001272PRJ	Pier 70-Waterfront Site	"The proposed project would involve development of a 28-acre site into a mixed-use development, including parks, roads, and infrastructure. Below is a breakdown of the use types of the Pier 70-waterfront site development.  Residential ? Development of a r"	1100	26-Mar-20	Approved
2015-004568PRJ	10 SOUTH VAN NESS AVE	The Project includes demolition of the existing two-story commercial building on the project site, last used for Automobile Sales and Repair, and new construction of a 55-story, 590-ft tall (610 feet, including elevator penthouses and screening features),	966	11-Jun-20	Approved
2012.1384	400 02ND ST	Demolition of existing 1-to-4 story buildings and construction of 3 new buildings.	489	20-Feb-20	Approved
2016-014802PRJ	98 FRANKLIN ST	Demolition of an existing surface parking lot and construction of a new 36-story mixed-use building with 345 dwelling units over the secondary school facilities for the International High School of the French American International School, ground floor re	345	28-May-20	Approved
2017-008051PRJ	30 VAN NESS AVE	The Project proposes an alteration of the existing 5-story commercial office building and construction of a 47-story, approximately 520-foot tall tower containing 333 dwelling units, atop a podium containing approximately 234,000 square feet of office use	333	21-May-20	Approved
2018-011363PRJ	941 MISSION ST	New construction of a 21-story, 302 unit mixed-use building.	302	11-Dec-20	Approved
2018-010889PRJ	1064-1068 MISSION ST	Approved Priority Processing for 100% Affordable Housing project: The project proposes new construction of 6-story building, 105 studio dwelling units for formerly homeless seniors, 153 studio dwelling units for formerly homeless adults, 2 one bedroom uni	254	13-Nov-20	Approved
2017-003559PRJ	3700 CALIFORNIA ST	Demolition of most existing buildings, conversion of Marshall Hale building at 3698 California into residential, retention of 401 Cherry building with 9 residential units, and new construction of up to 37 buildings, with 3-7 stories, below-grade parking,	249	27-Feb-20	Approved
2017-000275PRJ	921 HOWARD ST	The proposed project includes construction of a new 180' High-Rise, eighteen story, mixed-use residential tower and podium containing 203 residential units and 1,970 square feet of ground floor retail. Three off-street parking spaces, 254 bicycle parking	203	15-Dec-20	Approved
2016-007850PRJ	88 Broadway	The proposed project is two-six story buildings containing affordable family and senior housing. First floor podium will provide ground floor units, commercial, commercial parking, bike parking, common space/social services for resident use, and property	178	6-Apr-20	Approved
2016-013312PRJ	542-550 Howard Street (Transbay Parcel F)	The Project proposes the construction of a 61-story, approximately 800-foot tall mixed-use tower containing a 189-guest room hotel, approximately 276,000 square feet office space, and 165 dwelling units, in addition to 2 mechanical floors, 7 floors of sh	175	9-Jan-20	Approved
2020-010665PRJ	242 HAHN ST	Install exterior building maintenance system equipment	167	18-Nov-20	Approved
2015-012729PRJ	600 VAN NESS AVE	Demolition of existing McDonald's building; Construction of new 9 floor (+ mech. penthouse) residential building; Project includes ground level retail on Van Ness & golden Gate Ave.; 2-story townhouses on Elm Street; new street trees on Elm Street and gol	150	15-Jul-20	Approved

NOTE: The case descriptions were pulled from the system as-is.

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Planning Case No.	Address / Project Name	Case Description	Net No. Units	Approval Date	Action
2019-000118PRJ	833 BRYANT ST	Construction of new 6-story residential apartment building 100 percent affordable housing, with associated offices and common spaces at ground floor, 146 dwelling unit and retail with no basement. New commercial space is proposed at NW corner. New lands	146	3-Aug-20	Approved
2018-015768PRJ	1351 42ND AVE	The proposed project will demolish the existing Francis Scott key annex and construct a 100% affordable multi-family housing project for educators. The proposed new building approximate total of 159,205 gross square feet will be a total of 4-stories on 42	134	9-Dec-20	Approved
2017-014088PRJ	681 FLORIDA ST	Proposed development of 130-units of affordable housing with 30% set aside for homeless families and approximately 9,140sf of arts related ground floor PDR space. Project includes (44) studios, (31) one-bedrooms, (38) two-bedrooms, and (17) three-bedrooms	130	14-Jan-20	Approved
2019-017795PRJ	1151 FAIRFAX AVE	"1. Mayor directive# 17-02. 100% affordable housing. To erect a 5-story, 76-unit residential with mixed used building. 2. Mayor directive# 17-02. 100% affordable housing. To erect a 6-story, 1-basement, 42-unit residential/mixed used building."	118	6-Nov-20	Approved
2018-011249PRJ	1567 CALIFORNIA ST	The project site is located on the northeast corner of California and Polk streets with frontage on both streets, on three parcels totaling 18,625 square feet in the Nob Hill neighborhood. The lot is occupied by a two-story 10,020-gross-square-foot, comme	97	13-Feb-20	Approved
2016-000173PRJ	950 Gough Street	CONSTRUCT (N) RESIDENTIAL, ASSEMBLY, PARKING	95	16-Sep-20	Approved
2015-010406PRJ	490 South Van Ness Ave	New construction of a 100% affordable housing project as per Section 315 and 329 of the Planning Code. See Plans and NSR #20179K52801400009 dated 10/20/17. Revision to Motion 19250 and BPA 201010052342.	81	9-Mar-20	Approved
2020-003840PRJ	180 Jones St	This project would construct a nine (9) story multi-family residential building with seventy (70) studio apartments. Each studio apartment includes a full kitchen and bathroom. The building will also include resident support and management areas at the	70	19-Aug-20	Approved
2015-015950PRJ	955 POST ST	The proposed project would demolish the existing two-story auto repair garage on-site and construct an eight-story, 80-foot mixed-use residential and commercial building over basement with 69 residential units and approximately 1,538 square feet of ground	69	19-Nov-20	Approved
2019-021893PRJ	78 HAIGHT ST	100% affordable project. Construction of new mid-rise, 8-story, 63 unit building for TAY (transitional-aged youth who are at risk of homelessness) and general population.	63	21-Feb-20	Approved
2006.0587	495 CAMBRIDGE ST	The proposed project would demolish the four two-story buildings and construct 56 dwelling units on 33 newly subdivided lots in a new PUD development. Ten lots would contain single-family homes and 23 lots would contain duplexes. Access would be provided v	56	29-Sep-20	Approved
2018-008259PRJ	2030 Polk Street - 1580 Pacific Avenue	To demolish the existing one story commercial building and parking lot and the construction of a 6-Story, 65'-0" tall, mixed-use residential-commercial building.	53	3-Dec-20	Approved

NOTE: The case descriptions were pulled from the system as-is.

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Planning Case No.	Address / Project Name	Case Description	Net No. Units	Approval Date	Action
2017-002915PRJ	3001 24TH ST	Construction of new 5 story type V-A over type I-A building to accommodate 45 units of senior affordable apartments. The building shall include office, community space, laundry room, and other support spaces. Also includes the construction of outdoor play	45	18-Feb-20	Approved
2019-023628PRJ	3601 LAWTON ST	Home SF - The project is located at 3601 Lawton Street & 42nd Ave. The site is currently occupied with a gas station (76 Gas station). The proposed project consists of four residential stories above commercial podium. The project will consist of 41 apartm	41	30-Jul-20	Approved
2017-009796PRJ	1088 HOWARD ST	The proposed project would preserve the existing one story over mezzanine industrial building and construct a 24,023-gross-square-foot (gsf), 70-foot-tall residential addition. The residential portion of the proposed project would provide 24 residential u	24	23-Oct-20	Approved
2016-010589PRJ	2300 Harrison Street	The Project includes the demolition of an existing surface parking lot and the construction of a six-story over basement garage, 75-foot tall, 77,365 square foot vertical addition to an existing 3-story, 42-foot tall, 68,538 square foot office building. T	24	6-Jan-20	Approved
2016-005406PRJ	42 Otis Street	Construction of a five-story, mixed-use building to include a total of 24 single-room occupancy units on four floors with ground level retail space; UPDATE (03/09/20) - The Project was revised to maintain the 24 SRO Dwelling Units and revisions to the amo	24	12-Mar-20	Approved
2015-011202PRJ	603 TENNESSEE ST	The project will involve demolishing an existing two story storage building and construct a new six story, 24 dwelling, 58 foot tall, multi-family residential building. The ground floor will include active space (lobby), residential, 20 parking stalls a	24	8-Jul-20	Approved
2020-003920PRJ	1335 Larkin Street	Add unit to previously approved 22-unit building, changing from 22 units to 23 units . Proposed project is to split the 6th floor rear unit #602 to large 2 bedroom unit into two smaller one bedroom units (#602 and #604).	23	25-Sep-20	Approved
2016-014062PRJ	3230 & 3236 24th Street	Project would demolish existing parking lot, merge the two lots and construct a 55-foot-tall, five-story, 18,151-square-foot, mixed-use building with 17 dwelling units, 2,090 square feet of ground-floor retail space (three units), 2,109 square feet of co	21	2-Jan-20	Approved
2018-000468PRJ	3945 JUDAH STREET	The approximately 4,750-square-foot project site is located on the southeast corner of Judah Street and 45th Avenue, on the block bounded by Judah Street to the north, 44th Avenue to the east, 45th Avenue to the west, and Kirkham Street to the south in th	20	23-Apr-20	Approved
2014.0168	2092 03RD ST / 600 18TH STREET	The proposed project involves the demolition of the existing buildings and construction of a new six-story, 68-foot-tall (84-foot-tall with elevator penthouse), 22,615-square-foot building consisting of 19 dwelling units, 3,110 square feet of ground-floor	19	24-Jan-20	Approved
2007.1347	3637-3657 SACRAMENTO ST	Demolish existing garage and medical office buildings and construct a new 4-story building with 18 residential units over retail, and 85 parking spaces on 3 basement levels.	18	15-Jul-20	Approved
2018-012065PRJ	5500 MISSION ST	The approximately 9,200-square-foot (sf), rectangular-shaped project site consists of four lots (Assessor?s block 7066, lots 036, 001G, 001H, 001I) located on the southwest corner of the intersection of Foote Avenue and Mission Street in the Outer Mission	17	25-Jun-20	Approved
2018-012918PRJ	986 SOUTH VAN NESS AVE	The 5,222-square-foot rectangular project site (Assessor?s Block/Lot 3610/010) is located on a block bounded by South Van Ness Avenue to the east, 21st Street to the south, Mission Street to the west, and 20th Street to the north in the Mission neighborho	17	26-Aug-20	Approved

NOTE: The case descriptions were pulled from the system as-is.

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Planning Case No.	Address / Project Name	Case Description	Net No. Units	Approval Date	Action
2016-004707PRJ	2632 MISSION ST	Construction of new 5 story mixed used building. Sixteen residential units (8 one bedrooms, 8 two bedrooms) over one retail space with basement storage. Sixteen bicycle parking spaces are provided on the ground floor, with zero vehicle parking spaces. Com	16	1-Oct-20	Approved
2019-000506PRJ	2000 POST ST	Add units per ord 162-16. At existing garage, grade level, removal of parking stalls and addition 15 adu's.	15	24-Sep-20	Approved
2018-016944PRJ	388 Beale Street	The project site is in the RH-DTR (Rincon Hill Downtown Residential) zoning district and in an 80/200-R Height and Bulk District. The existing building was built in 1999. The proposed project would convert the existing parking spaces on floors 3 and 4 to 1	13	6-Feb-20	Approved
2013.1330	1900 MISSION STREET	Project includes the demolition of an approximately 1,690 sq. ft. automotive repair shop and construction of a new 68-ft. 8-in tall, 15,518 sq. ft., six-story-over-basement mixed-use building with full lot coverage that includes 817 sq. ft. of ground floor	12	23-Jul-20	Approved
2020-003209PRJ	300, 320 & 340 Octavia Street	Revision to approved site permit BP# 2008.1001.3158, add mezzanine at commercial level, revised interior layout on first floor, modification to facade material to eliminate retractable folding perf. metal screen	12	26-Jun-20	Approved
2020-003868PRJ	350 Octavia Street	Alter site to pa# 2008-1001-3162 to add mezzanine at commercial level. Revised interior layout at 1st floor. Modification of facade material to eliminate retractable folding perf metal screen. Change type 3a to type 5a over 1.	12	26-Jun-20	Approved
2019-017770PRJ	1535 JACKSON ST	Construction of 11 additional SRO units to an existing 19-unit SRO building. Related exterior work including raising of lintel at basement-level entrance at Jackson Street facade; in-kind replacement of front entrance terrazzo steps; replacement of non-hi	11	9-Jun-20	Approved
2017-013929PRJ	5616 MISSION ST	The project proposes to demolish a one-story vacant commercial building to construct a four-story mixed use building with 8 dwelling units above a 3,151 sq. ft. commercial space for trade office use with two accessory vehicle spaces.	10	5-Sep-19	Approved

Source: Planning Department

NOTE: The case descriptions were pulled from the system as-is.

**TABLE A-4.****Major Housing Projects with Applications Accepted at the Planning Department, 2020**

Planning Case No.	Address / Project Name	Case Description	Net Units
2020-006006PRJ	300 De Haro St	Large Project Authorization request for a proposed seven-story mixed-use development consisting of 290 Group Housing units with associated common facilities and open space provisions. The subject property is triangular in shape, and has frontage on both 1	290
2020-009570PRJ	600 07TH ST	The proposed mix-use building includes 100 studios and 107 family units (one- to three-bedroom units), and one manager's unit. These will include 87 units for family households with incomes ranging between 50%-80% Area Median Income (?MOHCD AMI?), averagi	208
2017-000275PRJ	921 HOWARD ST	The proposed project includes construction of a new 180' High-Rise, eighteen story, mixed-use residential tower and podium containing 203 residential units and 1,970 square feet of ground floor retail. Three off-street parking spaces, 254 bicycle parking	203
2019-022850PRJ	1101-1123 SUTTER ST	This new mixed-use development will be located at 1101-1123 Sutter on an approximately 29,700 SF site, currently occupied by two structures: an auto repair shop with public garage (at 1101 Sutter) and a mortuary (at 1123 Sutter). At the corner of Sutter a	201
2020-011316PRJ	1454 20th Avenue	Project proposes to infill ground floor 183 GSF under second floor to be habitable spaces and remodel ground floor to have one bedroom, family room, home office, two full bathrooms and laundry closet, and to install gas furnace and water heater in garage.	183
2020-010665PRJ	242 HAHN ST	Install exterior building maintenance system equipment	167
2018-013877PRJ	2588 MISSION ST	The proposal includes new construction of a nine-story, approximately 80'-0" tall, 143,141 gross square feet (GSF) mixed-use building with 148 dwelling units (including 58 below market rate units consisting of 12 restricted affordable units for very low i	148
2020-009596PRJ	436 GEARY ST	The property known as Hotel Diva located at 440 Geary Street in San Francisco, CA includes 130 hotel rooms and approximately 4,700 sq feet of ground-floor retail space. The proposed project will convert these units to provide 130 units of group housing/ p	130
2019-013276PRJ	560 BRANNAN ST	The project sponsor proposes to demolish a 2-story, 15,672 PDR building and construct a 9-story, 77,220 sf building with 71,580 sf residential use, and 5,640 sf of PDR space. The project will consist of 8 floors, 102 market-rate units, 18 on-site affordab	120
2020-010648PRJ	240 VAN NESS AVE	The project would demolish the existing structures and construct an 8-story building with 100 dwelling units. Ninety-eight units will be 100% affordable with 25% of the units serving individuals with intellectual/developmental disabilities. Two units will	109
2019-020740PRJ	468 TURK ST	Demolition of an existing 2-story commercial building and construction of a new 9-story building containing 91 Group Housing units. This project will be seeking approval under the State Density Bonus Law program.	101
2020-006779PRJ	4200 GEARY BLVD	"Priority Project per ED 13-01 Demolition of an existing mortuary and construction of a new 98 unit 100% affordable senior housing building with a ground floor neighborhood commercial space. No parking provided"	98
2020-010275PRJ	98 PENNSYLVANIA AVE	"This proposal is a modification of the project that was approved by the Planning Commission on September 22, 2016 under Case No. 2013.0517ENX. The new project will utilize the State Density Bonus Program to construct a seven-story, 68 foot tall, 76,012 sq"	79

NOTE: The case descriptions were pulled from the system as-is.

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Planning Case No.	Address / Project Name	Case Description	Net Units
2020-003840PRJ	180 Jones St	This project would construct a nine (9) story multi-family residential building with seventy (70) studio apartments. Each studio apartment includes a full kitchen and bathroom. The building will also include resident support and management areas at the	70
2020-005514PRJ	1010 Mission Street	Proposed new construction of 9-story residential building with 57 SRO & a street level commercial space	57
2020-000805PRJ	5425 MISSION ST	Home-SF request for demolition of the existing vacant commercial building, merge lots 19 & 19A. New construction of new mixed use building above the 40' height limit.	50
2020-006544PRJ	1721 15th ST	The Project site is a 10,083 sqft rectangular lot located within the block bounded by 15th, Valencia ,16th and Albion Streets in the Valencia NCT. It fronts 15th Street (95.125') and is currently improved with a 10,470 gross sqft, two-story commercial bui	50
2019-023105PRJ	2800 GEARY BLVD	The project is to demolish the existing one-story Firestone Tire retail and service center and build a mixed-use, residential building that utilizes the HOME-SF program to increase the density from 19 to 43 units. The lot is irregularly shaped and is at	43
2019-023628PRJ	3601 LAWTON ST	Home SF - The project is located at 3601 Lawton Street & 42nd Ave. The site is currently occupied with a gas station (76 Gas station). The proposed project consists of four residential stories above commercial podium. The project will consist of 41 apartm	41
2019-012820PRJ	4742 MISSION ST	"Demolition of an existing vacant commercial building. Lot merger. Construction of a new 7-story, 36 unit mixed-use building.  The PPA was accepted on 6/18/19 and the 60 day deadline is 8/17/19."	38
2020-004414PRJ	618-630 Octavia ST	The proposed project will demolish an existing structure consisting of 4x one-bedroom units and an on-grade parking lot, merging the two lots to construct a new 7-story building with 38 dwelling units including 4 replacement one-bedroom units, one ground	34
2020-005253PRJ	3260 26TH ST	The project proposes demolition of an existing 1-story industrial structure (auto repair) and the construction of a new 6-story / 37 unit apartment (rental) building with ground floor residential and a small commercial unit. A small basement will provide	34
2020-009874PRJ	2318 MISSION ST	The Project proposes to construct a new 7-story mixed-use residential and commercial building at 2316- 2326 Mission Street (Block 3596, Lots 004, 005 and 006), utilizing California state Density Bonus Law (Cal. Gov. Code Sec. 65915, et. seq.). The Site is	32
2020-007481PRJ	5367 DIAMOND HEIGHTS BLVD	Conditional Use Authorization request to subdivide the 34,714 square foot vacant RM-1 zoned lot into five lots and construct four 4-bedroom single family homes on four of the lots and twenty 3-bedroom condominium dwelling units on the fifth lot, for a tot	24
2020-003920PRJ	1335 Larkin Street	Add unit to previously approved 22-unit building, changing from 22 units to 23 units . Proposed project is to split the 6th floor rear unit #602 to large 2 bedroom unit into two smaller one bedroom units (#602 and #604).	23
2020-005897PRJ	233 GEARY ST	The project proposes conversion of an existing retail and office department store building into a mixed-use building with 60,000 sf of retail (3+basement floors), 93,000 of (existing and new) office use (5 floors), and 23 residential dwelling units (3+pen	23

NOTE: The case descriptions were pulled from the system as-is.

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Planning Case No.	Address / Project Name	Case Description	Net Units
2014.0008	33 NORFOLK ST	The project sponsor proposes to merge Lots 053A and 093 and to replace the existing industrial building and parking lot with a 5-story, 55-foot tall, residential building with a total of 11 residential units. The project is proposing to provide 4 off-stre	22
2019-012659PRJ	285 OCEAN AVE	Home-SF request for demolition of existing single story office building . New construction of a 21-unit 6-story apartment building.	21
2019-012676PRJ	159 FELL ST	Demolition of an existing 2-story building. Construction of a new 7-story building with ground-floor retail and 20 residential units.	20
2019-022510PRJ	240-250 CHURCH ST	Demolition of an existing 1-story commercial building and construction of a new 20-unit dwelling with ground floor retail space. 250 Church LLC, the project sponsor, proposes to redevelop the property per the state density bonus law (California government	20
2019-020031PRJ	2861-2865 San Bruno Ave	Conditional Use Authorization request to legalize potential additional unauthorized four dwelling units and demolition, exterior alterations, work beyond scope of approved permits, Revision permit issued to configure the interior was not routed to Plannin	18
2020-001610PRJ	3832 18TH ST	Conditional Use Authorization request for new construction of a 6-story residential building with 19 group housing units.	18
2018-002909PRJ	4110-4116 Geary Blvd	Demolition of an existing 2-story single family home with ground floor commercial on one lot and a single story commercial on the other. Construction of a new 16-unit apartment building with ground floor commercial.	15

NOTE: The case descriptions were pulled from the system as-is.

Source: Planning Department

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**TABLE A-5.**  
**Major Projects Authorized for Construction by DBI, 2020**

Address	Net Units	Construction Type	Authorization Date
266 04TH ST	70	New Construction	1/3/2020
5 THOMAS MELLON DR	90	New Construction	1/14/2020
5 THOMAS MELLON DR	174	New Construction	1/14/2020
2525 VAN NESS AV	28	New Construction	2/4/2020
254 CLARA ST	24	New Construction	2/11/2020
988 OAKDALE AV	22	New Construction	2/19/2020
5 THOMAS MELLON DR	76	New Construction	2/20/2020
5 THOMAS MELLON DR	113	New Construction	2/20/2020
5 THOMAS MELLON DR	133	New Construction	2/20/2020
3236 24TH ST	17	New Construction	2/25/2020
351 FRIEDEL ST	67	New Construction	4/23/2020
151 FRIEDEL ST	45	New Construction	4/23/2020
474 OFARRELL ST	176	New Construction	5/13/2020
53 COLTON ST	96	New Construction	5/18/2020
4101 03RD ST	32	New Construction	6/30/2020
1610 JERROLD AV	85	New Construction	6/30/2020
1125 STEVENSON ST	64	New Construction	7/2/2020
78 HAIGHT ST	63	New Construction	7/21/2020
52 KIRKWOOD AV	77	New Construction	7/21/2020
180 JONES ST	70	New Construction	9/11/2020
999 OAKDALE AV	39	New Construction	10/5/2020
1051 03RD ST	258	New Construction	10/26/2020
2000 POST ST	15	Alternation	12/11/2020
1360 43RD AV	135	New Construction	12/14/2020
921 HOWARD ST	203	New Construction	12/22/2020
196 VALENCIA ST	29	Alternation	12/23/2020

Source: Planning Department; Department of Building Inspection

**TABLE A-6.**  
**Density Bonus Program Projects in the Pipeline by Program, 2020**

Address	Total Net Units With Bonus	Affordable Units	Waivers	Incentives and Concessions
<b>State Density Bonus Program</b>				
1500 15th Street	188 Group Housing Room	32	Height and Rear Yard	None
469 Stevenson Street	495	89	Bulk, FAR, Exposure, Wind Height	Height
95 Hawthorne Street	392	55	Height, Exposure, Rear Yard, Open Space, Street Wall Articulation, Wind	Not Available
598 Bryant Street	280	54	Not Available	Not Available
457-475 Minna Street	270	143	Height, Wind, Open Space, Rear Yard, Exposure	Active Ground Floor
1068 Mission Street	258	258	Not Available	Rear yard and Bicycle Space
650 Harrison Street	245	35	Not Available	Not Available
1560 Folsom Street	231	44	Height, Rear Yard, Exposure, Open Space, Horizontal Mass Break, Height Limits for Narrow Streets	Height, Rear Yard, Exposure, Open Space, Horizontal Mass Break, Height Limits for Narrow Streets Not Available
1458 San Bruno Avenue	205	25	Not Available	Not Available
300 De Haro Street	204	30	Not Available	Not Available
1101 Sutter Street	201	40	Not Available	Not Available
600 McAllister Street	196	29	Not Available	Not Available
401 South Van Ness	154	12	Not Available	Not Available
321 Florida Street	151	28	Not Available	Not Available
833 Bryant Street	146	146	Not Available	Not Available
819 Ellis Street	138	Not Available	Not Available	Not Available
4840 Mission Street	137	114	Not Available	Not Available
681 Florida Street	130	130	Height, Exposure, Rear Yard Open Space	Ground Floor Ceiling Height
300 5th Street	130	20	Not Available	Not Available
2588 Mission Street	129	24	Not Available	Not Available
2340 San Jose Avenue	121	121	Height, Wind, Open Space, Rear Yard, Exposure	Not Available
984 Folsom Street	111	Not Available	Not Available	Not Available

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Address	Total Net Units With Bonus	Affordable Units	Waivers	Incentives and Concessions
1567 California Street	100	9	Height, Bulk, Rear Yard, Open Space	Parking
1965 Market Street	96	14	None	Height
750 Florida Street	94	9	Not Available	Not Available
793 South Van Ness Avenue	75	11	Height	Rear Yard , Required Off-Street Parking
2918 Mission Street	75	8	Height, Bulk, Rear Yard, Exposure	None
1355 Fulton Street	75	18	Not Available	Not Available
220 9th Street	74	12	Not Available	Not Available
266 4th Street	70	70	Not Available	Not Available
344 14th Street	69	8	Height and Rear Yard	Not Available
468 Turk Street	66	Not Available	Not Available	Not Available
2205 Mission Street	63	63	Height, Rear Yard, Open Space	None
78 Haight Street	63	63	Not Available	Not Available
755 Brannan Street	58	8	Rear Yard, Height, Open Space, Bay Windows	None
2030 Polk Street	50	9	Bulk, Rear Yard	Open Space
351 12th Street	50	8	Height, Exposure, Open Space, Rear Yard	Not Available
2101 Van Ness Avenue	48	Not Available	Not Available	Not Available
425 Broadway	46		Rear Yard, Height, Bulk	Not Available
346 9th Street	45	Not Available	Not Available	Not Available
3001 24th Street	45	45	Exposure, Bike Parking	Rear Yard
1721 15th Street	41	9	Not Available	Not Available
222 Dore Street	33	3	Height, Rear Yard, Exposure, Open Space, Bike Parking	Not Available
2140 Market Street	33	3	Height, Rear Yard, Exposure	Not Available
2135 Market Street	33	3	Height, Open Space	Not Available
618-630 Octavia Street	30	7	Not Available	Not Available
2300 Harrison Street	24	4	Height, Alley Height	Rear Yard, Active Use, Ground Floor Ceiling height

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Address	Total Net Units With Bonus	Affordable Units	Waivers	Incentives and Concessions
1021 Valencia Street	24	2	Height, Exposure	None
280 7th Street	23	2	Not Available	Open Space
240-242 Church Street	22	2	Not Available	Not Available
5210 3rd Street	20	2	Not Available	Not Available
1233 Folsom Street	13	2	Not Available	Not Available
478-484 Haight Street	12	Not Available	Height	Height
2255 Taraval Street	10	1	Rear Yard, Usable Open Space, Exposure None	Height
875 Sansome Street	9	Not Available	Rear Yard and Open Space	Not Available
180 Jones	70	Not Available	Not Available	Not Available
1585 Folsom Street	94	Not Available	Not Available	Not Available
98 Pennsylvania Avenue	79	Not Available	Not Available	Not Available
155 Grove Street	135	Not Available	Not Available	Not Available
4200 Geary Street	98	98	Not Available	Not Available
<b>HOME-SF Density Bonus Program</b>				
3945 Judah Street	20	5	Not Available	Not Available
3330 Geary Boulevard	41	12	Not Available	Not Available
2601 Van Ness Avenue	50	18	Not Available	Not Available
65 Ocean Avenue	195	49	Not Available	Not Available
3333 San Bruno Avenue	69	7	Not Available	Not Available
999 Texas Street	25	7	Not Available	Not Available
134 Porter Street	10	2	Not Available	Not Available
2800 Geary Boulevard	44	13	Not Available	Not Available
921 O'Farrell Street	51	16	Not Available	Not Available
285 Ocean Avenue	21	6	Not Available	Not Available
3565 Geary Boulevard	73	18	Not Available	Not Available
4742 Mission Street	36	9	Not Available	Not Available
4110 Geary Boulevard	16	4	Not Available	Not Available
3055 Clement Street	6	2	Not Available	Not Available
5012 3rd Street	29	9	Not Available	Not Available
2700 Sloat Blvd	213	49	Not Available	Not Available
4712-4720 3rd Street	21	4	Not Available	Rear Yard

Source: Planning Department

**TABLE A-7.****Major Affordable Projects in the Pipeline as of December 31, 2020**

Address / Project Name	Very Low Income Homeless or Single	Very Low Income Seniors	Very Low Income Families	Very Low Income Disabled	Lower Income	Homeowner Low to Moderate Income	Homeowner Moderate Income	Total Affordable Units	Total Net Units	Development Type
Complete										
95 Laguna St Senior	15	63						78	79	New Construction
350 Ellis St		96						96	96	Rehabilitation
250 Fremont St / Transbay Block 8			79					79	80	New Construction
455 Fell St / Central Fwy Parcel O	33				74			107	108	New Construction
1150 3rd St / Edwin M. Lee Apartments	62		33		23			118	119	New Construction
1296 Shotwell / Casa Adelante	22	71						93	94	New Construction
1491 Sunnysdale Ave / Sunnysdale Parcel Q			54					54	55	New Construction
1601 Mariposa St			60					60	299	New Construction
1550 Mission St			110					110	550	New Construction
<b>SUBTOTALS</b>	<b>132</b>	<b>230</b>	<b>336</b>	<b>0</b>	<b>97</b>	<b>0</b>	<b>0</b>	<b>795</b>	<b>1,480</b>	
Currently Under Construction										
160 Folsom St / Mira Transbay Block 1						156		156	392	New Construction
691 China Basin St / Mission Bay South Block 6 West			68		46	37		151	152	New Construction
490 South Van Ness Ave	27				62			89	89	New Construction
1950 Mission St / Le Fenix	32				124			156	157	New Construction
2060 Folsom / Casa Adelante	29				97			126	127	New Construction
735 Davis / Seawall Lot 322-1 Senior	15		23		6	8		52	53	New Construction
88 Broadway / Seawall Lot 322-1 Family			49		54	16	5	124	125	New Construction
1990 Folsom / Casa Adelante			87		28	27		142	143	New Construction
3001 24th Street / Casa de la Mission	44							44	45	New Construction

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Address / Project Name	Very Low Income Homeless or Single	Very Low Income Seniors	Very Low Income Families	Very Low Income Disabled	Lower Income	Homeowner Low to Moderate Income	Homeowner Moderate Income	Total Affordable Units	Total Net Units	Development Type
555 Larkin St			75		21	11		107	108	New Construction
1068 Mission St	153	103						256	258	New Construction
681 Florida St	39		40		10	40		129	130	New Construction
410 China Basin St / Mission Bay South Block 9	140							140	141	New Construction
401 Avenue of the Palms / Maceo May Apts						104		104	105	New Construction
242 Hahn St / Sunnydale Block 6			126			41		167	168	New Construction
3138 Kamille Ct / Bernal Dwellings HOPE VI					159			159	160	Rehabilitation
401 Rose St / Hayes Valley South HOPE VI					109			109	110	Rehabilitation
833 Bryant St	145							145	146	New Construction
<b>SUBTOTALS</b>	<b>624</b>	<b>103</b>	<b>468</b>	<b>0</b>	<b>716</b>	<b>440</b>	<b>5</b>	<b>2,356</b>	<b>2,609</b>	
<b>In Pre-Construction Phase</b>										
667 Linden St / Hayes Valley North HOPE VI			51		32			83	84	Rehabilitation
2340 San Jose Ave / Balboa Park Upper Yard			89		5	36		130	131	New Construction
4840 Mission St			74			61		135	137	New Construction
1360 43rd Ave / Shirley Chisholm Village			33		15	62	24	134	135	New Construction
1 Avenue of the Palms / Treasure Island Parcel C3.1	71				16	27	23	137	138	New Construction
266 4th St	35				34			69	70	New Construction
78 Haight St / Central Fwy Parcel U	32					31		63	63	New Construction
921 Howard St						150	51	201	203	New Construction
730 Stryan St	40		79					119	120	New Construction
1151 Fairfax Ave / Hunters View Phase III HOPE SF			97			20		117	118	New Construction

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Address / Project Name	Very Low Income Homeless or Single	Very Low Income Seniors	Very Low Income Families	Very Low Income Disabled	Lower Income	Homeowner Low to Moderate Income	Homeowner Moderate Income	Total Affordable Units	Total Net Units	Development Type
600 7th St	120		20		38	29		207	208	New Construction
4200 Geary Blvd	20		10		67			97	98	New Construction
299 Fremont St / Transbay Block 2 West	30	74			34	14		152	153	New Construction
Transbay Block 2 East	20		10		50	20		100	101	New Construction
1801 25th St / Potrero Block B			107		33	16		156	157	New Construction
Sunnydale Block 3			126		41			167	168	New Construction
<b>SUBTOTALS</b>	<b>368</b>	<b>74</b>	<b>696</b>	<b>0</b>	<b>365</b>	<b>466</b>	<b>98</b>	<b>2,067</b>	<b>2,084</b>	
<b>In Preliminary Planning</b>										
207 Cameron Wy / Alice Griffith Ph 5 HOPE SF			30		5			35	36	New Construction
207 Cameron Wy / Alice Griffith Ph 6 HOPE SF		130						130	131	New Construction
"1095 Connecticut St / 751 Missouri St Potrero Terrace & Potrero Annex HOPE SF"			619		181			800	1,600	New Construction
1654 Sunnydale Ave / Sunnydale HOPE SF			775		196			971	1,700	New Construction

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Address / Project Name	Very Low Income Homeless or Single	Very Low Income Seniors	Very Low Income Families	Very Low Income Disabled	Lower Income	Homeowner Low to Moderate Income	Homeowner Moderate Income	Total Affordable Units	Total Net Units	Development Type
HPSY II-Candlestick Point 10a	40				115			155	156	New Construction
HPSY II-Candlestick Point 11a	38				137			175	176	New Construction
Hunters Point Shipyard Blocks 52 & 54			111					111	112	New Construction
Balboa Reservoir Building E			26			97		123	124	New Construction
375 Laguna Honda Blvd / Laguna Honda Hospital Continuum of Care	40	158						198	200	New Construction
240 Van Ness Ave / Kelsey Civic Center			80	27				107	109	New Construction
Mission Bay Block 9A						148		148	148	New Construction
<b>TOTALS</b>	<b>78</b>	<b>130</b>	<b>1,535</b>	<b>0</b>	<b>634</b>	<b>0</b>	<b>0</b>	<b>2,377</b>	<b>3,911</b>	

Source: Mayor's Office of Housing and Community Development

**TABLE A-8.**  
**Housing Trends by Neighborhood, 2020**

Analysis Neighborhood	Units Completed from New Construction	Units Demolished	Units Gained or Lost from Alterations	Net Change in Number of Units	Rank
Bayview Hunters Point	9	-251	12	<b>(230)</b>	32
Bernal Heights	3		3	<b>6</b>	26
Castro/Upper Market	4	-2	6	<b>8</b>	23
Chinatown			2	<b>2</b>	30
Crocker Amazon			<b>10</b>	<b>10</b>	21
Diamond Heights				<b>0</b>	31
Downtown/Civic Center				<b>0</b>	31
Excelsior	203			<b>203</b>	7
Financial District/South Beach	627		149	<b>776</b>	2
Glen Park	2		2	<b>4</b>	28
Haight Ashbury	4		20	<b>24</b>	14
Hayes Valley	74		8	<b>82</b>	9
Inner Richmond			21	<b>21</b>	15
Inner Sunset			13	<b>13</b>	19
Japantown				<b>0</b>	31
Lakeshore				<b>0</b>	31
Lone Mountain		-1	4	<b>3</b>	29
Marina	106		-1	<b>105</b>	8
Mission	1047		30	<b>1,077</b>	1
Mission Bay	452			<b>452</b>	3
Nob Hill	14		4	<b>18</b>	17
Noe Valley	3	-3	4	<b>4</b>	28
North Beach			9	<b>9</b>	22
Oceanview/Merced/Ingleside	3		12	<b>15</b>	18
Outer Mission			11	<b>11</b>	20
Outer Richmond	23	-1	22	<b>44</b>	12
Outer Sunset			7	<b>7</b>	25
Pacific Heights				<b>0</b>	31
Parkside				<b>0</b>	31
Portola			8	<b>8</b>	24
Potrero Hill	514	-93	8	<b>429</b>	5
Presidio	-	-	-	<b>-</b>	-

CONTINUED &gt;

Analysis Neighborhood	Units Completed from New Construction	Units Demolished	Units Gained or Lost from Alterations	Net Change in Number of Units	Rank
Presidio Heights			4	4	28
Russian Hill	3	-1	17	19	16
Seacliff				0	31
South of Market	276		2	278	6
Sunset/Parkside	50		26	76	10
Tenderloin	448		2	450	4
Treasure Island				0	31
Twin Peaks	1		4	5	27
Visitacion Valley	1		3	4	28
West of Twin Peaks	15		16	31	13
Western Addition	75		1	76	11
<b>San Francisco</b>	3,957	(352)	439	4,044	

Source: Department of Building Inspection

Note: Net Change equals Units Completed less Units Demolished plus Units Gained or Lost from Alterations



**TABLE B-1.**  
**Housing Trends by Planning Area, 2020**

Planning Area	Units Authorized for Construction	Units Completed from New Construction	Units Demolished	Units Gained or Lost from Alterations	Net Change In Number of Units
Balboa Park	-	3	-	3	6
Bayview Hunters Point	-	-	-251	12	(239)
Central SoMa	-	215	-	-	215
Central Waterfront	-	334	-	-	334
Chinatown	-	-	-	1	1
Downtown	-	448	-	149	597
East SoMa	-	39	-	1	40
Hunters Point Shipyard	-	-	-	-	0
Japantown	-	-	-	-	0
Market and Octavia	-	620	-	11	631
Mission (EN)	-	393	-	22	415
Mission Bay	-	-	-	-	0
Northeast Waterfront	-	53	-	-	53
Parkmerced	-	-	-	-	0
Rincon Hill	-	-	-	-	0
Showplace Square/ Potrero Hill	-	632	-93	8	547
Van Ness Corridor	-	41	-	2	43
Western Shoreline	-	-	-	-	0
Western SoMa (EN)	-	126	-	1	127
Rest of City	-	1053	-8	229	1,274
<b>San Francisco</b>	<b>0</b>	<b>3,957</b>	<b>(352)</b>	<b>439</b>	<b>4,044</b>

**Source:** Planning Department; Department of Building Inspection

**Note:** Net Change equals Units Completed less Units Demolished plus Units Gained or (Lost) from Alterations.

**TABLE B-2.****Units Entitled by Planning Area, 2020**

Planning Area	No. of Projects	Units Entitled
Bayview Hunters Point	36	174
Central SoMa	6	1,005
Central Waterfront (EN)	5	1,158
Chinatown	1	2
Downtown	1	254
East SoMa (EN)	1	24
Fisherman's Wharf	3	4
Glen Park	1	1
Japantown	1	6
Market and Octavia	15	1,769
Mission (EN)	46	438
Northeast Waterfront	1	178
Rincon Hill	1	13
Schlage Lock	1	6
Showplace Square/Potrero Hill (EN)	15	18
Transbay	1	175
Van Ness Corridor	7	159
Western Shoreline	4	4
Western SoMa (EN)	3	153
Rest of the City	404	1,791
<b>San Francisco</b>	<b>553</b>	<b>7,332</b>

Source: Planning Department

**TABLE B-3.**  
**Net Housing Units Completed by Building Type and Planning Area, 2020**

Planning Area	Single Family	2 Units	3 to 9 Units	10 to 19 Units	20+ Units	Total
Balboa Park	-	-	-	3	0	3
Bayview Hunter's Point	-	10	(140)	(106)	-	-236
Central SoMa	-	-	9	-	206	215
Central Waterfront	-	-	-	-	334	334
Chinatown	-	-	-	-	1	1
Downtown	-	-	-	-	597	597
East SoMa	-	-	1	-	39	40
Hunter's Point Shipyard	-	-	-	-	-	0
Japantown	-	-	-	-	-	0
Market and Octavia	-	2	8	1	620	631
Mission (EN)	3	2	15	18	377	415
Mission Bay	-	-	-	-	-	0
Northeast Waterfront	-	-	-	-	53	53
Rincon Hill	-	-	-	-	-	0
Showplace Square/ Potrero Hill	-	-	-	-	-	0
Transbay	(1)	5	(8)	(64)	615	547
Van Ness Corridor	-	-	-	-	-	0
Western Shoreline	-	-	-	-	43	43
Western SoMa (EN)	1	-	-	22	104	127
Rest of City	21	123	116	58	956	1,274
<b>Total</b>	<b>24</b>	<b>142</b>	<b>1</b>	<b>-68</b>	<b>3,945</b>	<b>4,044</b>

Source: Department of Building Inspection

**TABLE B-4.****Units Demolished by Building Type and Planning Area, 2020**

Planning Area	Buildings	Units by Building Type				Total
		<i>Single</i>	<i>2 Units</i>	<i>3 to 4 Units</i>	<i>5+ Units</i>	
Bayview Hunters Point	34	-1	-	-	(250)	-251
Showplace Square/ Potrero Hill (EN)	9	-1	-	-	(92)	-93
Rest of City	7	-6	(2)	-	-	-8
<b>San Francisco</b>	<b>50</b>	<b>-8</b>	<b>-2</b>	<b>0</b>	<b>-342</b>	<b>-352</b>

Source: Planning Department; Department of Building Inspection

**TABLE B-5.****Units Lost Through Alterations and Demolitions by Planning Area, 2020**

Planning Area	Alterations					Units Demolished	Total Units Lost
	<i>Illegal Units Removed</i>	<i>Units Merged into Larger Units</i>	<i>Correction to Official Records</i>	<i>Units Converted</i>	<i>Total Alterations</i>		
Bayview Hunters Point	-	-	-	-	-	(251)	<b>-251</b>
Showplace Square/ Potrero Hill	-	-	-	-	-	(93)	<b>-93</b>
Rest of City	-	(5)	-	(1)	(6)	(8)	<b>-14</b>
<b>San Francisco</b>	<b>0</b>	<b>-5</b>	<b>0</b>	<b>-1</b>	<b>-6</b>	<b>-352</b>	<b>-358</b>

Source: Planning Department; Department of Building Inspection

**TABLE B-6.****New Affordable Housing Constructed in Planning Areas, 2020**

Planning Area	Affordable Units	Total Net Units	AMI Target	Tenure	Funding Source
<b>Central SoMa</b>					
363 6th St	12	104	LOW	Rental	Inclusionary
345 6th St	14	102	LOW	Rental	Inclusionary
<b>Central Waterfront (EN)</b>					
2171 3rd St	8	109	MOD	Ownership	Inclusionary
777 TENNESSEE ST	8	59	MOD	Rental	Inclusionary
<b>Market and Octavia</b>					
49 SOUTH VAN NESS	110	550	LOW	Rental	Inclusionary
188 OCTAVIA ST	4	27	LOW	Rental	Inclusionary
1700 MARKET ST	5	42	MOD	Rental	Inclusionary
<b>Mission</b>					
1950 MISSION ST	150	157	LOW	Rental	AHSC, CDLAC, LIHTC, Other
1801 MISSION ST	2	17	MOD	Rental	Inclusionary
490 SOUTH VAN NESS	7	84	LOW	Rental	CDLAC, LIHTC, Other
<b>NORTHEAST WATERFRONT</b>					
735 DAVIS ST	52	53	LOW	Rental	AHP, CDLAC, LIHTC, Other
<b>Showplace Square/Potrero Hill</b>					
1301 16TH ST	28	172	MOD	Rental	Inclusionary
210 ARKANSAS ST/1601 MARIPOSA ST	60	154	LOW	Rental	Inclusionary
<b>Western SoMa (EN)</b>					
333 12TH ST	27	200	LOW	Rental	Inclusionary
<b>Rest of City</b>					
160 FOLSOM ST	156	390	MOD	Ownership	Inclusionary
390 1ST ST	22	180	LOW	Rental	Inclusionary
950 GOUGH ST	11	95	MOD	Rental	Inclusionary
2898 SLOAT BL	7	56	MOD	Ownership	Inclusionary
2444 LOMBARD ST	6	43	MOD	Rental	Inclusionary
<b>San Francisco</b>	<b>689</b>	<b>2,577</b>	<b>--</b>	<b>--</b>	<b>--</b>

Source: Mayor's Office of Housing and Community Development

Note: Does not include the 130 secondary units that are not deed-restricted.

**TABLE C.****San Francisco Zoning Districts, as of 2020**

Zoning	General Descriptions
Residential, House and Mixed Districts	
RH-1	Residential, House – One Family
RH-1(D)	Residential, House – One Family (Detached Dwellings)
RH-1(S)	Residential, House – One Family with Minor Second Unit
RH-2	Residential, House – Two Family
RH-3	Residential, House – Three Family
RM-1	Residential, Mixed – Low Density
RM-2	Residential, Mixed – Moderate Density
RM-3	Residential, Mixed – Medium Density
RM-4	Residential, Mixed – High Density
Residential Transit-Oriented Districts	
RTO	Residential Transit-Oriented
RTO-M	Residential Transit-Oriented, Mission
Residential-Commercial Districts	
RC-3	Residential-Commercial – Medium Density
RC-4	Residential-Commercial – High Density
Public District	
P	Public District
Neighborhood Commercial Districts	
NC-1	Neighborhood Commercial Cluster District
NC-2	Small-Scale Neighborhood Commercial District
NC-3	Moderate-Scale Neighborhood Commercial District
NC-S	Neighborhood Commercial Shopping Center District
NCD-24th-Noe	24th - Noe Valley Neighborhood Commercial District
NCD-Broadway	Broadway Neighborhood Commercial District
NCD-Castro	Castro Neighborhood Commercial District
NCD-Haight	Haight Neighborhood Commercial District
NCD-Inner Clement	Inner Clement Neighborhood Commercial District
NCD-Inner Sunset	Inner Sunset Neighborhood Commercial District
NCD-North Beach	North Beach Neighborhood Commercial District
NCD-Outer Clement	Outer Clement Neighborhood Commercial District
NCD-Pacific	Pacific Neighborhood Commercial District
NCD-Polk	Polk Neighborhood Commercial District
NCD-Sacramento	Sacramento Neighborhood Commercial District
NCD-Union	Union Neighborhood Commercial District
NCD-Upper Fillmore	Upper Fillmore Neighborhood Commercial District

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Zoning	General Descriptions
NCD-Upper Market	Upper Market Neighborhood Commercial District
NCD-West Portal	West Portal Neighborhood Commercial District
Neighborhood Commercial Transit Districts	
NCT-1	Neighborhood Commercial Transit Cluster District
NCT-2	Small-Scale Neighborhood Commercial Transit District
NCT-3	Moderate-Scale Neighborhood Commercial Transit District
NCT-24th-Mission	24th - Mission Neighborhood Commercial Transit District
NCT-Hayes-Gough	Hayes - Gough Neighborhood Commercial Transit District
NCT-Mission	Mission Neighborhood Commercial Transit District
NCT-Ocean	Ocean Neighborhood Commercial Transit District
NCT-SoMa	South of Market Neighborhood Commercial Transit District
NCT-Upper Market	Upper Market Neighborhood Commercial Transit District
NCT-Valencia	Valencia Neighborhood Commercial Transit District
Chinatown Mixed Use Districts	
CRNC	Chinatown Residential Neighborhood Commercial District
CVR	Chinatown Visitor Retail District
CCB	Chinatown Community Business District
South of Market Mixed Use Districts	
RED	South of Market Residential Enclave District
RSD	South of Market Residential Service District
SLI	South of Market Service-Light Industrial District
SLR	South of Market Light Industrial-Residential District
SSO	South of Market Service / Secondary Office District
Eastern Neighborhoods Mixed Use Districts	
MUG	Mixed Use - General District
MUO	Mixed Use - Office District
MUR	Mixed Use - Residential District
SPD	South Park Mixed Use District
UMU	Urban Mixed Use District
Downtown Residential Districts	
DTR-RH	Downtown Residential - Rincon Hill District
DTR-SB	Downtown Residential - South Beach District
Western SoMa Mixed Use Districts	
WMUG	Western SOMA Mixed Use General
Commercial Districts	
C-2	Community Business District
Downtown Commercial Districts	
C-3-S	Downtown Commercial - Service District
C-3-G	Downtown Commercial - General District

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Zoning	General Descriptions
C-3-R	Downtown Commercial - Retail District
C-3-O	Downtown Commercial - Office District
C-3-O(SD)	Downtown Commercial - Office (Special Development) District
Industrial Districts	
M-1	Light Industrial District
M-2	Heavy Industrial District
C-M	Heavy Commercial District
PDR-1-B	Production Distribution and Repair Light Industrial Buffer District
PDR-1-G	Production Distribution and Repair General District
PDR-1-D	Production Distribution and Repair Design District
PDR-2	Core Production Distribution and Repair District
Redevelopment Agency Districts	
MB-OS	Mission Bay, Open Space
MB-O	Mission Bay, Office
MB-RA	Mission Bay Redevelopment Area Plan District
HP-RA	Bayview Hunters Point Redevelopment Area Plan District

Source: Planning Department

**TABLE D.**  
**In-Lieu Housing Fees Collected, 2011–2020**

Fiscal Year	Amount Collected
2011	\$1,173,628
2012	\$1,536,683
2013	\$9,130,671
2014	\$29,911,959
2015	\$73,576,017
2016	\$91,178,296
2017	\$107,299,676
2018	\$51,133,873
2019	\$30,922,187
2020	\$14,826,324
<b>TOTAL</b>	<b>\$410,689,314</b>

Source: Department of Building Inspection



## Appendix E: Glossary

**Affordable Housing Unit:** A housing unit – owned or rented – at a price affordable to low- and middle-income households. An affordable rental unit is one for which rent equals 30% of the income of a household with an income at or below 80% of the HUD median income for the San Francisco PMSA, utilities included. An affordable ownership unit is one for which the mortgage payments, PMI, property taxes, homeowners dues, and insurance equal 33% of the gross monthly income of a household earning between 80% and 120% of the San Francisco PMSA median income, assuming a 10% down payment and a 30-year, 8% fixed-rate loan.

**Alterations:** Improvements and enhancements to an existing building. At DBI, building permit applications for alterations use Forms 3 and 8. If you are not demolishing an existing building (Form 6) or newly constructing a new building (Forms 1 and 2), you are “*altering*” the building.

**Certificate of Final Completion (CFC):** A document issued by DBI that attests that a building is safe and sound for human occupancy.

**Conditional Use Permit:** A permit that is only granted with the consent of the Planning Commission, and not as of right.

**Condominium:** A building or complex in which units of property, such as apartments, are owned by individuals and common parts of the property, such as the grounds and building structure, are owned jointly by all of the unit owners.

**Current dollars:** The dollar amount for a given period or year not adjusted for inflation. In the case of income, it is the income amount in the year in which a person or household receives it. For example, the income someone received in 1989 unadjusted for inflation is in current dollars.

**General Plan:** Collection of Objectives, Policies, and Guidelines to direct guide the orderly and prudent use of land.

**HMFA:** HUD Metro FMR (Fair Market Rent) Area an urbanized county or set of counties with strong social and economic ties to neighboring communities.

PMSAs are identified within areas of one million-plus populations.

**Housing Unit:** A dwelling unit that can be a single family home, a unit in a multi-unit building or complex, or a unit in a residential hotel.

**Inclusionary Housing Units:** Housing units made affordable to lower- and moderate-income households as a result of legislation or policy requiring market rate developers to include or set aside a percentage (usually 10% to 20%) of the total housing development to be sold or rented at below market rates (BMR). In San Francisco, this is usually 15%, and it applies to most newly constructed housing developments containing five or more dwelling units.

**Median Income:** The median divides the household income distribution into two equal parts: one-half of the households falling below the median household income and one-half above the median.

**Pipeline:** All pending development projects – filed, approved or under construction. Projects are considered to be “in the pipeline” from the day they are submitted for review with the Planning Department, the Redevelopment Agency (SFRA), or DBI, until the day the project is issued a Certificate of Final Completion by DBI.

**Planning Code:** A local law prescribing how and for what purpose each parcel of land in a community may be used.

**Primary Metropolitan Statistical Area (PMSA):** A PMSA is an urbanized county or set of counties with strong social and economic ties to neighboring communities. PMSAs are identified within areas of one million-plus populations.

**Single Room Occupancy (SRO) Units:** Residential hotel rooms, typically occupied by one person, lacking bathroom and/or kitchen facilities.

**Temporary Certificate of Occupancy (TCO):** Like a CFC, a TCO allows occupancy of a building pending final inspection.

# ACKNOWLEDGMENTS

## Mayor

London Breed

## Board of Supervisors

Connie Chan  
Matt Haney  
Rafael Mandelman  
Gordon Mar  
Myrna Melgar  
Aaron Peskin  
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## Department of Building Inspection

## Mayor's Office of Housing and Community Development

## Office of Community Investment and Infrastructure

## Department of Public Works

## Office of Economic and Workforce Development

## Rent Board

## Office of Civic Investment & Infrastructure



# SAN FRANCISCO PLANNING DEPARTMENT

**MEMO**

## Memo to the Planning Commission

Hearing Date: April 22, 2021

49 South Van  
Ness Ave.,  
Suite 1400  
San Francisco,  
CA 94103

Reception:  
628.652.7600

**DATE:** 16 April 2021

**PROJECT NAME:** HOUSING BALANCE REPORT NO. 11  
1 July 2010 – 30 June 2020

**STAFF CONTACT:** John Boldrick, Senior Administrative Analyst  
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**REVIEWED BY:** Michelle Littlefield, Data & Analytics Manager  
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### SUMMARY

This report is submitted in compliance with Ordinance No. 53-15 requiring the Planning Department to monitor and report on the housing balance between new market rate and new affordable housing production. One of the stated purposes of the Housing Balance is “to ensure that data on meeting affordable housing targets citywide and within neighborhoods informs the approval process for new housing development.” This report is the eleventh in the series and covers the ten-year period from 1 July 2010 through 30 June 2020. The report is published twice annually in April and October.

The ordinance defines the “Housing Balance” as the proportion of all new affordable housing units to the total number of all new housing units for a 10-year “Housing Balance Period,” accounting for any loss of units removed from “protected status.”<sup>1</sup> In addition, the reporting must include a calculation of “Projected Housing Balance” which is focused exclusively on forward-looking housing production and includes residential projects that have received approvals from the Planning Commission or Planning Department, including projects under construction, permitted for construction, and those entitled but that have not yet received permits to commence construction.

In the 2010 Q3–2020 Q2 Housing Balance Period, the Cumulative Housing Balance is 22.2%, which is slightly higher than the previous period (21.5% for 2010 Q1 – 2019 Q4). The Expanded Citywide Cumulative Housing Balance is 26.6%, which is slightly lower than the previous period (28.6% for 2010 Q1 – 2019 Q4), although this varies by Supervisor district. Distribution of the Expanded Cumulative Housing Balance over the 11 Board of Supervisor Districts ranges from -94.7% (District 4) to 68.5% (District 3), which is shorter in overall range compared to the previous period (-178% (District 4) to 67.5% (District 5). This variation,

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<sup>1</sup> Units under “protected status” include units that are subject to rent control under the City’s Residential Rent Stabilization and Arbitration Ordinance.

especially with negative housing balances, is due to the units permanently withdrawn from rent control protection relative to the number of total net new units and net affordable units built in those districts.

The Projected Housing Balance Citywide is 20.0%, slightly lower than the 22.7% projection for the previous 10-year period. The ordinance specifically excludes master planned multi-phase development projects from the projected housing balance calculations until site permits are obtained. As such, the following projects were identified for exclusion: Balboa Reservoir, Candlestick Point, India Basin, Mission Rock, Pier 70, Potrero Power Plant, and Schlage Lock.

The Projected Housing Balance methodology as required by the ordinance is not necessarily an accurate predictor of current or future affordable housing production, as it does not account for the expected (but not yet entitled or permitted) affordable housing projects with funding either in hand or expected by the City. Examples of these projects include those funded through inclusionary fees paid by housing projects otherwise included in the Balance calculation, jobs-housing linkage fees paid by commercial development, voter-approved bonds, and other sources of funding. For the past ten years, affordable housing production has accounted for 24% of overall production.

## BACKGROUND

On 21 April 2015, the Board of Supervisors passed Ordinance No. 53-15 amending the *Planning Code* to include a new *Section 103* requiring the Planning Department to monitor and report on the Housing Balance between new market rate housing and new affordable housing production. The *Housing Balance Report* is submitted bi-annually by April 1 and October 1 of each year and published on the Planning Department's website. *Planning Code Section 103* also requires an annual hearing at the Board of Supervisors on strategies for achieving and maintaining the required housing balance in accordance with the City's housing production goals. (See *Appendix A* for complete text of Ordinance No. 53-15.) This hearing typically accompanies the April report.

On July 16 and July 27, 2020, staff provided an update to the Planning Commission and the Board of Supervisors, respectively, on anticipated delays on the delivery of several housing and area plan monitoring reports due to the COVID-19 pandemic, deployment of staff as disaster service workers, and unfilled vacancies on the Data and Analytics Team. Since that time, the Planning Department has restructured to consolidate existing data analysts into a single team, moving the data team to the Administration Division for easier collaboration with the IT Team, and recruiting for data team vacancies to meet existing mandatory reporting requirements and emerging data analysis needs for the Department. *Housing Balance Report No. 11*, which covers the 10-year period of 1 July 2010 through 30 June 2020, and *Housing Balance Report No. 12*, which covers the 10-year period of 1 January 2011 through 31 December 2020 (provided under separate cover), are submitted to meet the October 2020 and April 2021 housing balance reporting requirements, respectively.

The stated purposes for the Housing Balance Monitoring and Reporting are: a) to maintain a balance between new affordable and market rate housing Citywide and within neighborhoods; b) to make housing available for all income levels and housing need types; c) to preserve the mixed-

income character of the City and its neighborhoods; d) to offset the withdrawal of existing housing units from rent stabilization and the loss of single-room occupancy hotel units; e) to ensure the availability of land and encourage the deployment of resources to provide sufficient housing affordable to households of very low, low, and moderate incomes; f) to ensure adequate housing for families, seniors and the disabled communities; g) to ensure that data on meeting affordable housing targets Citywide and within neighborhoods informs the approval process for new housing development; and h) to enable public participation in determining the appropriate mix of new housing approvals.

Housing production targets adopted by the State and the Association of Bay Area Governments, and reflected in the City's *Housing Element*, last adopted in April 2015, calls for a minimum of 28,870 new units to be built in San Francisco between 2015 and 2022, including a minimum of 16,333 affordable units (57%<sup>2</sup> of the total). As mandated by law, the City provides the State Department of Housing and Community Development an annual progress report.<sup>3</sup> In addition, in November 2014, San Francisco's voters endorsed Proposition K, which set as city policy a goal to help construct or rehabilitate at least 30,000 homes by 2020, at least 33% of which will be affordable to low- and moderate-income households.<sup>4</sup> While the *Housing Balance Report* is intended to supplement analysis towards adopted City housing goals, the report and its calculations do not specifically track performance toward meeting goals set by the City's *Housing Element*/RHNA and Proposition K and are not comparable because the metrics and methodologies differ.

This *Housing Balance Report* was prepared from data gathered from other published sources including the Planning Department's annual *Housing Inventory* and quarterly *Pipeline Report* data, Department of Building Inspection data, San Francisco Rent Board data, and affordable housing data from the Mayor's Office of Housing and Community Development.

## CUMULATIVE HOUSING BALANCE CALCULATION

*Planning Code Section 103* calls for the Housing Balance "be expressed as a percentage, obtained by dividing the cumulative total of extremely low, very low, low, and moderate income affordable housing (all units 0-120% AMI) minus the lost protected units, by the total number of net new housing units within the Housing Balance Period." The ordinance requires that the "Cumulative Housing Balance" be provided using two calculations: a) one consisting of net housing built within a 10 year Housing Balance period, less units withdrawn from protected status, plus net units in projects that have received both approvals from the Planning Commission or Planning Department and site permits from the Department of Building

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<sup>2</sup> The Ordinance inaccurately stated that "22% of new housing demands to be affordable to households of moderate means." San Francisco's Regional Housing Needs Assessment (RHNA) allocation for moderate income households is 19% of total production goals.

<sup>3</sup> Printed annual progress reports submitted by all California jurisdictions can be accessed here – <http://www.hcd.ca.gov/community-development/housing-element/annual-progress-reports/index.php> -- or by calling HCD at 916-263-2911 for the latest reports as many jurisdictions now file reports online.

<sup>4</sup> For tracking of the Prop K affordable housing goal, see <https://sfmohcd.org>.

Inspection, and b) the addition of net units gained through acquisition and rehabilitation of affordable units, HOPE SF and RAD units<sup>5</sup>. “Protected units” include units that are subject to rent control under the City’s Residential Rent Stabilization and Arbitration Ordinance. Additional elements that figure into the Housing Balance include completed HOPE SF and RAD public housing replacement, substantially rehabilitated units, and single-room occupancy hotel units (SROs). The equation below shows the second, expanded calculation of the Cumulative Housing Balance.

<div> [Net New Affordable Housing +  Completed Acquisitions &amp; Rehabs + Completed  HOPE SF + RAD Public Housing Replacement +  Entitled &amp; Permitted Affordable Units]  – [Units Removed from Protected Status] </div>	=	<div> <b>EXPANDED  CUMULATIVE  HOUSING  BALANCE</b> </div>
<hr/> <div> [Net New Housing Built + Net Entitled &amp; Permitted Units] </div>		

The first “Housing Balance Period” is a ten-year period starting with the first quarter of 2005 through the last quarter of 2014. Subsequent housing balance reports will cover the 10 years preceding the most recent quarter. This report covers July 2010 (Q3) through June 2020 (Q2).

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<sup>5</sup> HOPESF and Rental Assistance Demonstration (RAD) Program units are deed-restricted affordable units that have been acquired and rehabilitated.

Table 1A below shows that the Cumulative Housing Balance for 10-year 2010 Q3 – 2020 Q2 period is 22.2% citywide. With the addition of RAD units, the Expanded Cumulative Housing Balance is 27.1%. The expanded Cumulative Housing Balance for the previous 10-year 2010 Q1 – 2019 Q4 period was 28.6%. In 2016, the Board of Supervisors revised the ordinance to include Owner Move-Ins (OMIs)<sup>6</sup> in the “Units Removed from Protected Status” section of the Housing Balance calculation. Although OMIs were not specifically called out by in the original Ordinance in the calculation of the Housing Balance, these were included in earlier reports because this type of no-fault eviction results in the loss of rent-controlled units either permanently or for a period of time.

**Table 1A**  
**Cumulative Housing Balance Calculation, 2010 Q3 – 2020 Q2**

Bos District	Net New Affordable Housing Built	Acquisitions, Rehabs & Small Sites Complete	Total Entitled & Permitted Affordable Uni	Units Removed from Protected Status	Total Net New Units Built	Total Entitled & Permitted Uni	Cumulative Housing Balan
BoS Dist. 1	188	56	-	462	449	331	-27.9%
BoS Dist. 2	58	-	23	281	1,056	664	-11.6%
BoS Dist. 3	236	618	326	276	1,019	1,142	41.8%
BoS Dist. 4	7	12	10	459	76	378	-94.7%
BoS Dist. 5	674	841	164	313	1,584	1,675	41.9%
BoS Dist. 6	3,384	1,916	3,709	142	15,853	18,798	25.6%
BoS Dist. 7	103	-	284	221	554	5,853	2.6%
BoS Dist. 8	238	139	24	586	1,492	627	-8.7%
BoS Dist. 9	160	717	729	615	890	2,103	33.1%
BoS Dist. 10	1,802	223	4,618	278	5,434	17,959	27.2%
BoS Dist. 11	37	42	137	386	181	654	-20.4%
<b>Totals</b>	<b>6,887</b>	<b>4,564</b>	<b>10,024</b>	<b>4,019</b>	<b>28,588</b>	<b>50,184</b>	<b>22.2%</b>

<sup>6</sup> Owner Move-In (OMI) Evictions occur when a landlord or property owner recovers possession of a rental unit for the occupancy of the owner or relative of the owner for use as their principal residence for a period of at least 36 continuous months. This information is collected from the Rent Board.

Table 1B below shows the Expanded Cumulative Housing Balances for Board of Supervisor Districts, ranging from -94.7% (District 4) to 68.5% (District 3). Negative balances in Districts 1 (-9.5%), 4 (-94.7%), and 11 (-20.4%) resulted from the units removed from protected status relative to the net new affordable housing and net new housing units built in those districts.

**Table 1B**  
**Expanded Cumulative Housing Balance Calculation, 2010 Q3—2020 Q2**

Bos District	Net New Affordable Housing Built	Acquisitions, Rehabs & Small Sites Complete	RAD Program and Hope SF Replacement Units	Total Entitled & Permitted Affordable Units	Units Removed from Protected Status	Total Net New Units Built	Total Entitled & Permitted Units	Expanded Cumulative Housing Balance
BoS Dist. 1	188	56	144	-	462	449	331	-9.5%
BoS Dist. 2	58	-	251	23	281	1,056	664	3.0%
BoS Dist. 3	236	618	576	326	276	1,019	1,142	68.5%
BoS Dist. 4	7	12	-	10	459	76	378	-94.7%
BoS Dist. 5	674	841	806	164	313	1,584	1,675	66.6%
BoS Dist. 6	3,384	1,916	560	3,709	142	15,853	18,798	27.2%
BoS Dist. 7	103	-	109	284	221	554	5,853	4.3%
BoS Dist. 8	238	139	330	24	586	1,492	627	6.8%
BoS Dist. 9	160	717	268	729	615	890	2,103	42.1%
BoS Dist. 10	1,802	223	436	4,618	278	5,434	17,959	29.1%
BoS Dist. 11	37	42	-	137	386	181	654	-20.4%
<b>Totals</b>	<b>6,887</b>	<b>4,564</b>	<b>3,480</b>	<b>10,024</b>	<b>4,019</b>	<b>28,588</b>	<b>50,184</b>	<b>26.6%</b>

## PROJECTED HOUSING BALANCE

Table 2 below summarizes residential projects that have received entitlements from the Planning Commission or the Planning Department, have received an approved building permit from the Department of Building Inspection (DBI), or are currently under construction. Table 2 is the summary of Tables 3 and 4, thus providing a projected housing balance that includes any residential project that has received approval from the Planning Commission and Planning Department, as required by the ordinance.

Overall projected housing balance at the end of 2020 Q2 is 20.0%; for the previous 10-year reporting period, this projected balance was 22.7%. The projected balance is also expected to change as several major projects have yet to declare how their affordable housing requirements will be met. In addition, seven (7) entitled major development projects—Balboa Reservoir, Candlestick Point, India Basin, Mission Rock, Pier 70, Potrero Power Plant, and Schlage Lock—are not included in the accounting until site or building permits are issued as specified in the ordinance.

As established by the ordinance, the Projected Housing Balance also does not account for affordable housing units that will be produced with current and future affordable housing funding (e.g. Inclusionary Housing Fee, Jobs-Housing Linkage Fee, bond funds), including funds owed or already paid by projects in a given reporting cycle. Those affordable housing units are produced several years after the fee is collected. Units produced through the fee typically serve lower income households than do the inclusionary units, including special needs populations requiring services, such as seniors, transitional aged youth, families, and veterans.



Table 2

## Projected Housing Balance (Entitled, Permitted, and Under Construction Units), 2020 Q2

Bos District	Very Low Income	Low Income	Moderate Income	TBD	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
BoS Dist. 1	-	-	-	-	-	331	0.0%
BoS Dist. 2	-	-	-	23	23	664	3.5%
BoS Dist. 3	-	10	-	316	326	1,142	28.5%
BoS Dist. 4	-	-	10	-	10	378	2.6%
BoS Dist. 5	-	22	58	84	164	1,675	9.8%
BoS Dist. 6	110	474	174	2,951	3,709	18,798	19.7%
BoS Dist. 7	-	-	-	284	284	5,853	4.9%
BoS Dist. 8	-	-	22	2	24	627	3.8%
BoS Dist. 9	-	564	68	97	729	2,103	34.7%
BoS Dist. 10	60	366	127	4,065	4,618	17,959	25.7%
BoS Dist. 11	-	-	-	137	137	654	20.9%
<b>Totals</b>	<b>170</b>	<b>1,436</b>	<b>459</b>	<b>7,959</b>	<b>10,024</b>	<b>50,184</b>	<b>20.0%</b>

## Permitted and Under Construction Units

Table 3 below lists the number of units that have received approved building permits or are currently under construction in 2020 Q2. Forty-eight percent (48%) of these units will be built in or are currently being built in District 6. Another 18% will be built in or are currently being built in District 10. Of all units that have received approved permits from DBI or are currently under construction, 25% will be affordable.

**Table 3**  
**Building Permits Approved or Under Construction, 2020 Q2**

Bos District	Very Low Income	Low Income	Moderate Income	TBD	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
BoS Dist. 1	-	-	-	-	-	250	0.0%
BoS Dist. 2	-	-	-	23	23	278	8.3%
BoS Dist. 3	-	10	-	310	320	567	56.4%
BoS Dist. 4	-	-	7	-	7	154	4.5%
BoS Dist. 5	-	22	58	71	151	1,190	12.7%
BoS Dist. 6	110	442	149	1,231	1,932	8,507	22.7%
BoS Dist. 7	-	-	-	-	-	1,109	0.0%
BoS Dist. 8	-	-	22	-	22	370	5.9%
BoS Dist. 9	-	564	38	86	688	1,619	42.5%
BoS Dist. 10	60	202	55	813	1,130	3,182	35.5%
BoS Dist. 11	-	-	-	132	132	427	30.9%
<b>Totals</b>	<b>170</b>	<b>1,240</b>	<b>329</b>	<b>2,666</b>	<b>4,405</b>	<b>17,653</b>	<b>25.0%</b>

## Entitled Units

Table 4 below lists the number of units that have received entitlements from the Planning Commission or the Planning Department in 2020 Q2. Seven (7) entitled major development projects—Balboa Reservoir, Candlestick Point, India Basin, Mission Rock, Pier 70, Potrero Power Plant, and Schlage Lock—are not included in the accounting as specified in the ordinance. Forty-five percent (45%) of these units will be built in District 10, and 32% in District 6. Of all units that have received Planning entitlements, 17% will be affordable.

**Table 4**  
**Entitled Units without a Building Permit Issued, 2020 Q2**

Bos District	Very Low Income	Low Income	Moderate Income	TBD	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
BoS Dist. 1	-	-	-	-	-	81	0.0%
BoS Dist. 2	-	-	-	-	-	386	0.0%
BoS Dist. 3	-	-	-	6	6	575	1.0%
BoS Dist. 4	-	-	3	-	3	224	1.3%
BoS Dist. 5	-	-	-	13	13	485	2.7%
BoS Dist. 6	-	32	25	1,720	1,777	10,291	17.3%
BoS Dist. 7	-	-	-	284	284	4,744	6.0%
BoS Dist. 8	-	-	-	2	2	257	0.8%
BoS Dist. 9	-	-	30	11	41	484	8.5%
BoS Dist. 10	-	164	72	3,252	3,488	14,777	23.6%
BoS Dist. 11	-	-	-	5	5	227	2.2%
<b>Totals</b>	-	<b>196</b>	<b>130</b>	<b>5,293</b>	<b>5,619</b>	<b>32,531</b>	<b>17.3%</b>

## CUMULATIVE HOUSING BALANCE ELEMENTS

Because the scope covered by the Housing Balance calculation is broad, each element – or group of elements – will be discussed separately. The body of this report will account for figures at the Board of Supervisor district level. The breakdown of each element using the Planning Department District geographies, as required by *Section 103*, is provided separately in *Appendix B*. This is to ensure simple and uncluttered tables in the main body of the report.

### Affordable Housing and Net New Housing Production

Table 5 below shows housing production between 2010 Q3 and 2020 Q2. This ten-year period resulted in a net addition of 28,588 units to the City's housing stock, including 6,887 affordable units (or approximately 24%). Most of the net new housing units and affordable units built in the ten-year reporting period were in District 6 (15,853 and 3,384 units, respectively). District 10 follows with 5,434 net new units, including 1,802 affordable units.

The table below also shows that approximately 25% of net new units built between 2010 Q3 and 2020 Q2 were affordable units. Nearly half (46%) of the affordable units built during that period were in District 6, and 25% in District 10.

**Table 5**  
**New Housing Production by Affordability, 2010 Q3 – 2020 Q2<sup>7</sup>**

Bos District	Very Low Income	Low Income	Moderate Income	Middle Income	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
BoS Dist. 1	170	-	18	-	188	449	41.9%
BoS Dist. 2	-	-	58	-	58	1,056	5.5%
BoS Dist. 3	178	2	56	-	236	1,019	23.2%
BoS Dist. 4	-	-	7	-	7	76	9.2%
BoS Dist. 5	264	315	95	-	674	1,584	42.6%
BoS Dist. 6	1,391	1,639	354	-	3,384	15,853	21.3%
BoS Dist. 7	70	29	4	-	103	554	18.6%
BoS Dist. 8	117	99	22	-	238	1,492	16.0%
BoS Dist. 9	93	40	27	-	160	890	18.0%
BoS Dist. 10	1,047	605	150	-	1,802	5,434	33.2%
BoS Dist. 11	-	2	35	-	37	181	20.4%
<b>Totals</b>	<b>3,330</b>	<b>2,731</b>	<b>826</b>	<b>-</b>	<b>6,887</b>	<b>28,588</b>	<b>24.1%</b>

<sup>7</sup> It should be noted that units affordable to Extremely Very Low Income (EVLI) households are included under the Very Low Income (VLI) category because certain projects that benefit homeless individuals and families – groups considered as EVLI – have income eligibility caps at the VLI level.

## Acquisition and Rehabilitation of Affordable Housing Units

Table 6a below lists the number of units that have been rehabilitated and/or acquired between 2010 Q3 and 2020 Q2 to ensure permanent affordability. These are mostly single-room occupancy hotel units that are affordable to extremely very low and very low-income households.

**Table 6a**

**Acquisitions and Rehabilitation of Affordable Housing, 2010 Q3—2020 Q2**

Bos District ▼	No. of Building ▼	No. of Units ▼
BoS Dist. 1	2	28
BoS Dist. 2	-	-
BoS Dist. 3	8	563
BoS Dist. 4	1	6
BoS Dist. 5	11	807
BoS Dist. 6	17	1,872
BoS Dist. 7	-	-
BoS Dist. 8	4	129
BoS Dist. 9	22	605
BoS Dist. 10	1	223
BoS Dist. 11	1	21
Totals	67	4,254

## Small Sites Program

The San Francisco Small Sites Program (SSP) is an initiative of the Mayor's Office of Housing and Community Development (MOHCD) to acquire small rent-controlled buildings (with four to 25 units) where tenants are at risk of eviction through the Ellis Act <sup>8</sup>or owner move-ins. Since its inception in 2014, some 31 buildings with 310 units have been acquired.

**Table 6b**  
**Small Sites Program, 2014—2020 Q2**

Bos District	No. of Building	No. of Units
BoS Dist. 1	2	28
BoS Dist. 2	-	-
BoS Dist. 3	3	55
BoS Dist. 4	1	6
BoS Dist. 5	4	34
BoS Dist. 6	3	44
BoS Dist. 7	-	-
BoS Dist. 8	2	10
BoS Dist. 9	15	112
BoS Dist. 10	-	-
BoS Dist. 11	1	21
<b>Totals</b>	<b>31</b>	<b>310</b>

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<sup>8</sup> Ellis Act evictions occur when a landlord withdraws the rental unit from the residential rental housing market.

## RAD Program

The San Francisco Housing Authority's Rental Assistance Demonstration (RAD) program preserves at risk public and assisted housing projects. According to the Mayor's Office, RAD Phase I transferred 1,425 units to developers in December 2015. An additional 2,055 units were transferred as Phase II in 2016.

**Table 7**  
**RAD Affordable Units, 2015-2020 Q2**

Bos District	No. of Building	No. of Units
BoS Dist. 1	2	144
BoS Dist. 2	3	251
BoS Dist. 3	4	576
BoS Dist. 4	-	-
BoS Dist. 5	6	806
BoS Dist. 6	4	560
BoS Dist. 7	1	109
BoS Dist. 8	4	330
BoS Dist. 9	2	268
BoS Dist. 10	2	436
BoS Dist. 11	-	-
<b>Totals</b>	<b>28</b>	<b>3,480</b>

## Units Removed from Protected Status

San Francisco's Residential Rent Stabilization and Arbitration Ordinance protects tenants and preserves affordability of about 175,000 rental units by limiting annual rent increases. Landlords can, however, terminate tenants' leases through no-fault that are not the tenants' fault. The Housing Balance calculation takes into account units permanently withdrawn from rent stabilization as loss of affordable housing. The following no-fault evictions affect the supply of rent-controlled units by removing units from the rental market: condo conversion, demolition, Ellis Act, and owner move-ins (OMIs). It should be noted that initially, OMIs were not specifically called out by the Ordinance to be included in the calculation. However, because owner move-ins have the effect of the losing rent-controlled units either permanently or for a substantial period of time, these numbers are included in the Housing Balance calculation as intended by the legislation's sponsors. Some of these OMI units may return to being rentals and will still fall under the rent control ordinance. On 14 November 2016, the Board of Supervisors amended Planning Code Section 103 to include OMIs as part of the housing balance calculation.

Table 8 below shows the distribution of no-fault eviction notices issued between July 2010 and June 2020. Eviction notices have been commonly used as proxy for evictions. Owner Move-In and Ellis Act notices made up most of no-fault evictions (59% and 29% respectively). Distribution of

these no-fault eviction notices is almost evenly dispersed, with Districts 8 and 9 leading (each with approximately 15% of the total units removed from protected status).

**Table 8**  
**Units Removed from Protected Status, 2010 Q3—2020 Q2**

Bos District	Condo Conversion	Demolition	Ellis Act	Owner Move-In	Units Removed from Protected Status
BoS Dist. 1	3	20	126	313	462
BoS Dist. 2	18	9	72	182	281
BoS Dist. 3	6	7	150	113	276
BoS Dist. 4	-	69	79	311	459
BoS Dist. 5	16	12	74	211	313
BoS Dist. 6	-	75	55	12	142
BoS Dist. 7	-	28	57	136	221
BoS Dist. 8	26	26	215	319	586
BoS Dist. 9	8	43	236	328	615
BoS Dist. 10	2	26	48	202	278
BoS Dist. 11	-	59	63	264	386
<b>Totals</b>	<b>79</b>	<b>374</b>	<b>1,175</b>	<b>2,391</b>	<b>4,019</b>

## PERIODIC REPORTING AND ONLINE ACCESS

This report complies with the *Planning Code Section 103* requirement that the Planning Department publish and update the *Housing Balance Report* bi-annually on April 1 and October 1 of each year. *Housing Balance Reports* are available online, as mandated by the ordinance, by going to this link: <https://sfplanning.org/housing-balance-report>.

## ANNUAL HEARING

A hearing on the Housing Balance before the Board of Supervisors is scheduled each year. The Mayor's Office of Housing and Community Development, the Mayor's Office of Economic and Workforce Development, the Rent Stabilization Board, the Department of Building Inspection, and the City Economist will present strategies for achieving and maintaining a housing balance consistent with the City's housing goals at this annual hearing. The ordinance also requires that MOHCD will determine the amount of funding needed to bring the City into the required minimum 33% should the cumulative housing balance fall below that threshold.



APPENDIX A  
Ordinance 53-15

	AMENDED IN COMMITTEE 4/6/15	ORDINANCE NO. 53-15
1	[Planning Code - City Housing Balance Monitoring and Reporting]	
2		
3	Ordinance amending the Planning Code to require the Planning Department to monitor	
4	the balance between new market rate housing and new affordable housing, and publish	
5	a bi-annual Housing Balance Report; requiring an annual hearing at the Board of	
6	Supervisors on strategies for achieving and maintaining the required housing balance	
7	in accordance with San Francisco's housing production goals; and making	
8	environmental findings, Planning Code, Section 302 findings, and findings of	
9	consistency with the General Plan, and the eight priority policies of Planning Code,	
10	Section 101.1.	
11		
12	NOTE: Unchanged Code text and uncodified text are in plain Arial font.	
13	Additions to Codes are in <u>single-underline italics Times New Roman font</u> .	
14	Deletions to Codes are in <del>strikethrough italics Times New Roman font</del> .	
15	Board amendment additions are in <u>double-underlined Arial font</u> .	
16	Board amendment deletions are in <del>strikethrough Arial font</del> .	
17	Asterisks (* * * *) indicate the omission of unchanged Code	
18	subsections or parts of tables.	
19		
20	Be it ordained by the People of the City and County of San Francisco:	
21		
22	Section 1. Findings.	
23	(a) The Planning Department has determined that the actions contemplated in this	
24	ordinance comply with the California Environmental Quality Act (California Public Resources	
25	Code Sections 21000 et seq.). Said determination is on file with the Clerk of the Board of	
	Supervisors in File No. 150029 and is incorporated herein by reference. The Board of	
	Supervisors affirms this determination.	
	(b) On March 19, 2015, the Planning Commission, in Resolution No. 19337, adopted	
	findings that the actions contemplated in this ordinance are consistent, on balance, with the	
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1 adopts these findings as its own. A copy of said Resolution is on file with the Clerk of the  
2 Board of Supervisors in File No. 150029, and is incorporated herein by reference.

3 (c) Pursuant to Planning Code Section 302, this Board finds that this Planning Code  
4 Amendment will serve the public necessity, convenience, and welfare for the reasons set forth  
5 in Planning Commission Resolution No. 150029 and the Board incorporates such reasons  
6 herein by reference.

7  
8 Section 2. The Planning Code is hereby amended by adding new Section 103 to read  
9 as follows:

10 **SEC. 103. HOUSING BALANCE MONITORING AND REPORTING.**

11 **(a) Purposes.** *To maintain a balance between new affordable and market rate housing City-*  
12 *wide and within neighborhoods, to make housing available for all income levels and housing need*  
13 *types, to preserve the mixed income character of the City and its neighborhoods, to offset the*  
14 *withdrawal of existing housing units from rent stabilization and the loss of single-room-occupancy*  
15 *hotel units, to ensure the availability of land and encourage the deployment of resources to provide*  
16 *sufficient housing affordable to households of very low, low, and moderate incomes, to ensure adequate*  
17 *housing for families, seniors and the disabled community, to ensure that data on meeting affordable*  
18 *housing targets City-wide and within neighborhoods informs the approval process for new housing*  
19 *development, and to enable public participation in determining the appropriate mix of new housing*  
20 *approvals, there is hereby established a requirement, as detailed in this Section 103, to monitor and*  
21 *regularly report on the housing balance between market rate housing and affordable housing.*

22 **(b) Findings.**

23 *(1) In November 2014, the City voters enacted Proposition K, which established City*  
24 *policy to help construct or rehabilitate at least 30,000 homes by 2020. More than 50% of this housing*  
25 *would be affordable for middle-class households, with at least 33% affordable for low- and moderate-*

1 income households, and the City is expected to develop strategies to achieve that goal. This section  
2 103 sets forth a method to track performance toward the City's Housing Element goals and the near-  
3 term Proposition K goal that 33% of all new housing shall be affordable housing, as defined herein.

4 (2) The City's rent stabilized and permanently affordable housing stock serves very low-  
5 low-, and moderate-income families, long-time residents, elderly seniors, disabled persons and others.  
6 The City seeks to achieve and maintain an appropriate balance between market rate housing and  
7 affordable housing City-wide and within neighborhoods because the availability of decent housing and  
8 a suitable living environment for every San Franciscan is of vital importance. Attainment of the City's  
9 housing goals requires the cooperative participation of government and the private sector to expand  
10 housing opportunities to accommodate housing needs for San Franciscans at all economic levels and to  
11 respond to the unique needs of each neighborhood where housing will be located.

12 (3) For tenants in unsubsidized housing, affordability is often preserved by the  
13 Residential Rent Stabilization and Arbitration Ordinance's limitations on the size of allowable rent  
14 increases during a tenancy. As documented in the Budget and Legislative Analyst's October 2013  
15 Policy Analysis Report on Tenant Displacement, San Francisco is experiencing a rise in units  
16 withdrawn from rent controls. Such rises often accompany periods of sharp increases in property  
17 values and housing prices. From 1998 through 2013, the Rent Board reported a total of 13,027 no-fault  
18 evictions (i.e., evictions in which the tenant had not violated any lease terms, but the owner sought to  
19 regain possession of the unit). Total evictions of all types have increased by 38.2% from Rent Board  
20 Year (i.e. from March through February) 2010 to Rent Board Year 2013. During the same period, Ellis  
21 Act evictions far outpaced other evictions, increasing by 169.8% from 43 in Rent Board Year 2010 to  
22 116 in Rent Board Year 2013. These numbers do not capture the large number of owner buyouts of  
23 tenants, which contribute further to the loss of rent-stabilized units from the housing market. Any fair  
24 assessment of the affordable housing balance must incorporate into the calculation units withdrawn  
25 from rent stabilization.

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1                   (4) Pursuant to Government Code Section 65584, the Association of Bay Area  
2                   Governments (ABAG), in coordination with the California State Department of Housing and  
3                   Community Development (HCD), determines the Bay Area's regional housing need based on regional  
4                   trends, projected job growth, and existing needs. The regional housing needs assessment (RHNA)  
5                   determination includes production targets addressing housing needs of a range of household income  
6                   categories. For the RHNA period covering 2015 through 2022, ABAG has projected that at least 38%  
7                   of new housing demands for San Francisco will be from very low and low income households  
8                   (households earning under 80% of area median income), and another 22% of new housing demands to  
9                   be affordable to households of moderate means (earning between 80% and 120% of area median  
10                  income). Market-rate housing is considered housing with no income limits or special requirements  
11                  attached.

12                  (5) The Housing Element of the City's General Plan states: "Based on the growing  
13                  population, and smart growth goals of providing housing in central areas like San Francisco, near jobs  
14                  and transit, the State Department of Housing and Community Development (HCD), with the  
15                  Association of Bay Area Governments (ABAG), estimates that in the current 2015-2022 Housing  
16                  Element period San Francisco must plan for the capacity for roughly 28,870 new units, 57% of which  
17                  should be suitable for housing for the extremely low, very low, low and moderate income households to  
18                  meet its share of the region's projected housing demand." Objective 1 of the Housing Element states  
19                  that the City should "identify and make available for development adequate sites to meet the City's  
20                  housing needs, especially permanently affordable housing." Objective 7 states that San Francisco's  
21                  projected affordable housing needs far outpace the capacity for the City to secure subsidies for new  
22                  affordable units.

23                  (6) In 2012, the City enacted Ordinance 237-12, the "Housing Preservation and  
24                  Production Ordinance," codified in Administrative Code Chapter 10E.4, to require Planning  
25                  Department staff to regularly report data on progress toward meeting San Francisco's quantified

1 production goals for different household income levels as provided in the General Plan's Housing  
2 Element. That Ordinance requires data on the number of units in all stages of the housing production  
3 process at various affordability levels to be included in staff reports on all proposed projects of five  
4 residential units or more and in quarterly housing production reports to the Planning Commission. The  
5 Planning Department has long tracked the number of affordable housing units and total number of  
6 housing units built throughout the City and in specific areas and should be able to track the ratio called  
7 for in this Section 103.

8 (7) As the private market has embarked upon, and government officials have urged, an  
9 ambitious program to produce significant amounts of new housing in the City, the limited remaining  
10 available land makes it essential to assess the impact of the approval of new market rate housing  
11 developments on the availability of land for affordable housing and to encourage the deployment of  
12 resources to provide such housing.

13 **(c) Housing Balance Calculation.**

14 (1) For purposes of this Section 103, "Housing Balance" shall be defined as the  
15 proportion of all new housing units affordable to households of extremely low, very low, low or  
16 moderate income households, as defined in California Health & Safety Code Sections 50079.5 et seq.,  
17 as such provisions may be amended from time to time, to the total number of all new housing units for a  
18 10 year Housing Balance Period.

19 (2) The Housing Balance Period shall begin with the first quarter of year 2005 to the  
20 last quarter of 2014, and thereafter for the ten years prior to the most recent calendar quarter.

21 (3) For each year that data is available, beginning in 2005, the Planning Department  
22 shall report net housing construction by income levels, as well as units that have been withdrawn from  
23 protection afforded by City law, such as laws providing for rent-controlled and single resident  
24 occupancy (SRO) units. The affordable housing categories shall include net new units, as well as  
25 existing units that were previously not restricted by deed or regulatory agreement that are acquired for



1 preservation as permanently affordable housing as determined by the Mayor's Office of Housing and  
2 Community Development (MOHCD) (not including refinancing or other rehabilitation under existing  
3 ownership), protected by deed or regulatory agreement for a minimum of 55 years. The report shall  
4 include, by year, and for the latest quarter, all units that have received Temporary Certificates of  
5 Occupancy within that year, a separate category for units that obtained a site or building permit, and  
6 another category for units that have received approval from the Planning Commission or Planning  
7 Department, but have not yet obtained a site or building permit to commence construction (except any  
8 entitlements that have expired and not been renewed during the Housing Balance Period). Master  
9 planned entitlements, including but not limited to such areas as Treasure Island, Hunters Point  
10 Shipyard and Park Merced, shall not be included in this latter category until individual building  
11 entitlements or site permits are approved for specific housing projects. For each year or approval  
12 status, the following categories shall be separately reported:

13 (A) Extremely Low Income Units, which are units available to individuals or  
14 families making between 0-30% Area Median Income (AMI) as defined in California Health & Safety  
15 Code Section 50106, and are subject to price or rent restrictions between 0-30% AMI;

16 (B) Very Low Income Units, which are units available to individuals or families  
17 making between 30-50% AMI as defined in California Health & Safety Code Section 50105, and are  
18 subject to price or rent restrictions between 30-50% AMI;

19 (C) Lower Income Units, which are units available to individuals or families  
20 making between 50-80% AMI as defined in California Health & Safety Code Section 50079.5, and are  
21 subject to price or rent restrictions between 50-80% AMI;

22 (D) Moderate Income Units, which are units available to individuals or families  
23 making between 80-120% AMI, and are subject to price or rent restrictions between 80-120% AMI;

24 (E) Middle Income Units, which are units available to individuals or families  
25 making between 120-150% AMI, and are subject to price or rent restrictions between 120-150% AMI;

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1 (F) Market-rate units, which are units not subject to any deed or regulatory  
2 agreement with price restrictions;

3 (G) Housing units withdrawn from protected status, including units withdrawn  
4 from rent control (except those units otherwise converted into permanently affordable housing),  
5 including all units that have been subject to rent control under the San Francisco Residential Rent  
6 Stabilization and Arbitration Ordinance but that a property owner removes permanently from the  
7 rental market through condominium conversion pursuant to Administrative Code Section 37.9(a)(9),  
8 demolition or alterations (including dwelling unit mergers), or permanent removal pursuant to  
9 Administrative Code Section 37.9(a)(10) or removal pursuant to the Ellis Act under Administrative  
10 Code Section 37.9(a)(13);

11 (H) Public housing replacement units and substantially rehabilitated units  
12 through the HOPE SF and Rental Assistance Demonstration (RAD) programs, as well as other  
13 substantial rehabilitation programs managed by MOHCD.

14 (4) The Housing Balance shall be expressed as a percentage, obtained by dividing the  
15 cumulative total of extremely low, very low, low and moderate income affordable housing units (all  
16 units 0-120% AMI) minus the lost protected units, by the total number of net new housing units within  
17 the Housing Balance Period. The Housing Balance shall also provide two calculations:

18 (A) the Cumulative Housing Balance, consisting of housing units that have  
19 already been constructed (and received a Temporary Certificate of Occupancy or other certificate that  
20 would allow occupancy of the units) within the 10-year Housing Balance Period, plus those units that  
21 have obtained a site or building permit. A separate calculation of the Cumulative Housing Balance  
22 shall also be provided, which includes HOPE SF and RAD public housing replacement and  
23 substantially rehabilitated units (but not including general rehabilitation / maintenance of public  
24 housing or other affordable housing units) that have received Temporary Certificates of Occupancy  
25

1 within the Housing Balance Period. The Housing Balance Reports will show the Cumulative Housing  
2 Balance with and without public housing included in the calculation; and

3 (B) the Projected Housing Balance, which shall include any residential project  
4 that has received approval from the Planning Commission or Planning Department, even if the  
5 housing project has not yet obtained a site or building permit to commence construction (except any  
6 entitlements that have expired and not been renewed during the Housing Balance period). Master  
7 planned entitlements shall not be included in the calculation until individual building entitlements or  
8 site permits are approved.

9 (d) **Bi-annual Housing Balance Reports.** Within 30 days of the effective date of this  
10 Section 103 By June 1, 2015, the Planning Department shall calculate the Cumulative and Projected  
11 Housing Balance for the most recent two quarters City-wide, by Supervisorial District, Plan Area, and  
12 by neighborhood Planning Districts, as defined in the annual Housing Inventory, and publish it as an  
13 easily visible and accessible page devoted to Housing Balance and Monitoring and Reporting on the  
14 Planning Department's website. By August September 1st and February March 1st of each year, the  
15 Planning Department shall publish and update the Housing Balance Report, and present this report at  
16 an informational hearing to the Planning Commission and Board of Supervisors, as well as to any  
17 relevant body with geographic purview over a plan area upon request, along with the other quarterly  
18 reporting requirements of Administrative Code Chapter 10E.4. The annual report to the Board of  
19 Supervisors shall be accepted by resolution of the Board, which resolution shall be introduced  
20 by the Planning Department. The Housing Balance Report shall also be incorporated into the  
21 Annual Planning Commission Housing Hearing and Annual Report to the Board of Supervisors  
22 required in Administrative Code Chapter 10E.4.

23 (e) **Annual Hearing by Board of Supervisors.**

24 (1) The Board of Supervisors shall hold a public Housing Balance hearing on an annual  
25 basis by April 1 of each year, to consider progress towards the City's affordable housing goals.

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1 including the goal of a minimum 33% affordable housing to low and moderate income households, as  
2 well as the City's General Plan Housing Element housing production goals by income category. The  
3 first hearing shall occur no later than 30 days after the effective date of this ordinance, and by April 1  
4 of each year thereafter.

5 (2) The hearing shall include reporting by the Planning Department, which shall present  
6 the latest Housing Balance Report City-wide and by Supervisorial District and Planning District; the  
7 Mayor's Office of Housing and Community Development, the Mayor's Office of Economic and  
8 Workforce Development, the Rent Stabilization Board, by the Department of Building Inspection, and  
9 the City Economist on strategies for achieving and maintaining a housing balance in accordance with  
10 San Francisco's housing production goals. If the Cumulative Housing Balance has fallen below 33% in  
11 any year, MOHCD shall determine how much funding is required to bring the City into a minimum  
12 33% Housing Balance and the Mayor shall submit to the Board of Supervisors a strategy to accomplish  
13 the minimum of 33% Housing Balance. City Departments shall at minimum report on the following  
14 issues relevant to the annual Housing Balance hearing: MOHCD shall report on the annual and  
15 projected progress by income category in accordance with the City's General Plan Housing Element  
16 housing production goals, projected shortfalls and gaps in funding and site control, and progress  
17 toward the City's Neighborhood Stabilization goals for acquiring and preserving the affordability of  
18 existing rental units in neighborhoods with high concentrations of low and moderate income  
19 households or historically high levels of evictions; the Planning Department shall report on current  
20 and proposed zoning and land use policies that affect the City's General Plan Housing Element  
21 housing production goals; the Mayor's Office of Economic and Workforce Development shall report on  
22 current and proposed major development projects, dedicated public sites, and policies that affect the

23  
24  
25  
  
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1 City's General Plan Housing Element housing production goals; the Rent Board shall report on the  
2 withdrawal or addition of rent-controlled units and current or proposed policies that affect these  
3 numbers; the Department of Building Inspection shall report on the withdrawal or addition of  
4 Residential Hotel units and current or proposed policies that affect these numbers; and the City  
5 Economist shall report on annual and projected job growth by the income categories specified in the  
6 City's General Plan Housing Element.

7 (3) All reports and presentation materials from the annual Housing Balance hearing  
8 shall be maintained by year for public access on the Planning Department's website on its page  
9 devoted to Housing Balance Monitoring and Reporting.

10  
11 Section 4. Effective Date. This ordinance shall become effective 30 days after  
12 enactment. Enactment occurs when the Mayor signs the ordinance, the Mayor returns the  
13 ordinance unsigned or does not sign the ordinance within ten days of receiving it, or the Board  
14 of Supervisors overrides the Mayor's veto of the ordinance.

15  
16 APPROVED AS TO FORM:  
17 DENNIS J. HERRERA, City Attorney

18 By:   
19 MARLENA BYRNE  
Deputy City Attorney

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City and County of San Francisco  
Tails  
Ordinance

City Hall  
1 Dr. Carlton B. Goodlett Place  
San Francisco, CA 94102-4689

File Number: 150029

Date Passed: April 21, 2015

Ordinance amending the Planning Code to require the Planning Department to monitor the balance between new market rate housing and new affordable housing, and publish a bi-annual Housing Balance Report; requiring an annual hearing at the Board of Supervisors on strategies for achieving and maintaining the required housing balance in accordance with San Francisco's housing production goals; and making environmental findings, Planning Code, Section 302, findings, and findings of consistency with the General Plan, and the eight priority policies of Planning Code, Section 101.1.

April 06, 2015 Land Use and Transportation Committee - AMENDED, AN AMENDMENT OF THE WHOLE BEARING SAME TITLE

April 06, 2015 Land Use and Transportation Committee - RECOMMENDED AS AMENDED

April 14, 2015 Board of Supervisors - PASSED, ON FIRST READING

Ayes: 11 - Avalos, Breed, Campos, Christensen, Cohen, Farrell, Kim, Mar, Tang, Wiener and Yee

April 21, 2015 Board of Supervisors - FINALLY PASSED

Ayes: 11 - Avalos, Breed, Campos, Christensen, Cohen, Farrell, Kim, Mar, Tang, Wiener and Yee

File No. 150029

I hereby certify that the foregoing Ordinance was FINALLY PASSED on 4/21/2015 by the Board of Supervisors of the City and County of San Francisco.

Angela Calvillo  
Clerk of the Board

  
Mayor

Date Approved

## APPENDIX B

### CUMULATIVE HOUSING BALANCE REPORT No 10 TABLES BY PLANNING DISTRICTS

Table 1A

#### Cumulative Housing Balance Calculation, 2010 Q3 – 2020 Q2

Planning District	Net New Affordable Housing Built	Acquisitions, Rehabs & Small Sites Complete	Total Entitled & Permitted Affordable Units	Units Removed from Protected Status	Total Net New Units Built	Total Entitled & Permitted Units	Cumulative Housing Balance
Bernal Heights	2	356	9	181	60	169	81.2%
Buena Vista	282	202	97	190	1,124	749	20.9%
Central	22	16	7	315	354	335	-39.2%
Downtown	1,298	1,156	879	120	4,728	4,426	35.1%
Ingleside	122	-	284	193	565	5,835	3.3%
Inner Sunset	1	-	-	175	99	111	-82.9%
Marina	12	-	-	164	388	246	-24.0%
Mission	399	474	1,153	564	2,024	4,270	23.2%
Northeast	219	498	241	292	823	885	39.0%
Outer Sunset	7	12	10	459	68	377	-96.6%
Presidio	-	-	-	-	161	1	0.0%
Richmond	238	56	23	518	518	551	-18.8%
South Bayshore	1,386	223	3,171	106	1,995	13,147	30.9%
South Central	72	42	458	444	77	1,562	7.8%
South of Market	2,238	880	3,625	120	13,892	16,400	21.9%
Treasure Island	-	-	-	-	-	-	N/A
Western Addition	589	649	67	178	1,712	1,120	39.8%
<b>Totals</b>	<b>6,887</b>	<b>4,564</b>	<b>10,024</b>	<b>4,019</b>	<b>28,588</b>	<b>50,184</b>	<b>22.2%</b>

\*Treasure Island developments permitted are included as part of Planning District 9 South of Market.

**Table 1B**  
**Expanded Cumulative Housing Balance Calculation, 2010 Q3—2020 Q2**

Planning District	Net New Affordable Housing Built	Acquisitions, Rehabs & Small Sites Complete	RAD Program and Hope SF Replacement Units	Total Entitled & Permitted Affordable Units	Units Removed from Protected Status	Total Net New Units Built	Total Entitled & Permitted Units	Expanded Cumulative Housing Balance
Bernal Heights	2	356	268	9	181	60	169	198.3%
Buena Vista	282	202	132	97	190	1,124	749	27.9%
Central	22	16	107	7	315	354	335	-23.7%
Downtown	1,298	1,156	284	879	120	4,728	4,426	38.2%
Ingleside	122	-	-	284	193	565	5,835	3.3%
Inner Sunset	1	-	109	-	175	99	111	-31.0%
Marina	12	-	138	-	164	388	246	-2.2%
Mission	399	474	91	1,153	564	2,024	4,270	24.7%
Northeast	219	498	576	241	292	823	885	72.7%
Outer Sunset	7	12	-	10	459	68	377	-96.6%
Presidio	-	-	-	-	-	161	1	0.0%
Richmond	238	56	144	23	518	518	551	-5.3%
South Bayshore	1,386	223	436	3,171	106	1,995	13,147	33.7%
South Central	72	42	-	458	444	77	1,562	7.8%
South of Market	2,238	880	276	3,625	120	13,892	16,400	22.8%
Treasure Island	-	-	-	-	-	-	-	N/A
Western Addition	589	649	919	67	178	1,712	1,120	72.2%
<b>Totals</b>	<b>6,887</b>	<b>4,564</b>	<b>3,480</b>	<b>10,024</b>	<b>4,019</b>	<b>28,588</b>	<b>50,184</b>	<b>26.6%</b>

\*Treasure Island developments permitted are included as part of Planning District 9 South of Market.

Table 2

## Projected Housing Balance (Entitled, Permitted, and Under Construction Units), 2020 Q2

Planning District	Very Low Income	Low Income	Moderate Income	TBD	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
Bernal Heights	-	-	-	9	9	169	5.3%
Buena Vista	-	4	30	63	97	749	13.0%
Central	-	-	5	2	7	335	2.1%
Downtown	-	187	70	622	879	4,426	19.9%
Ingleside	-	-	-	284	284	5,835	4.9%
Inner Sunset	-	-	-	-	-	111	0.0%
Marina	-	-	-	-	-	246	0.0%
Mission	110	577	103	363	1,153	4,270	27.0%
Northeast	-	2	-	239	241	885	27.2%
Outer Sunset	-	-	10	-	10	377	2.7%
Presidio	-	-	-	-	-	1	0.0%
Richmond	-	-	-	23	23	551	4.2%
South Bayshore	-	-	72	3,099	3,171	13,147	24.1%
South Central	-	167	7	284	458	1,562	29.3%
South of Market	60	481	134	2,950	3,625	16,400	22.1%
Treasure Island	-	-	-	-	-	-	N/A
Western Addition	-	18	28	21	67	1,120	6.0%
<b>Totals</b>	<b>170</b>	<b>1,436</b>	<b>459</b>	<b>7,959</b>	<b>10,024</b>	<b>50,184</b>	<b>20.0%</b>

\*Treasure Island developments permitted are included as part of Planning District 9 South of Market.

Table 3

## Building Permits Approved or Under Construction, 2020 Q2

Planning District	Very Low Income	Low Income	Moderate Income	TBD	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
Bernal Heights	-	-	-	-	-	65	0.0%
Buena Vista	-	4	30	63	97	398	24.4%
Central	-	-	5	-	5	166	3.0%
Downtown	-	187	70	602	859	3,790	22.7%
Ingleside	-	-	-	-	-	1,096	0.0%
Inner Sunset	-	-	-	-	-	50	0.0%
Marina	-	-	-	-	-	156	0.0%
Mission	110	564	73	361	1,108	3,547	31.2%
Northeast	-	2	-	234	236	447	52.8%
Outer Sunset	-	-	7	-	7	153	4.6%
Presidio	-	-	-	-	-	1	0.0%
Richmond	-	-	-	23	23	192	12.0%
South Bayshore	-	-	-	218	218	906	24.1%
South Central	-	167	7	132	306	662	46.2%
South of Market	60	298	109	1,025	1,492	5,055	29.5%
Treasure Island	-	-	-	-	-	-	N/A
Western Addition	-	18	28	8	54	969	5.6%
<b>Totals</b>	<b>170</b>	<b>1,240</b>	<b>329</b>	<b>2,666</b>	<b>4,405</b>	<b>17,653</b>	<b>25.0%</b>

\*Treasure Island developments permitted are included as part of Planning District 9 South of Market.

**Table 4**  
**Entitled Units without a Building Permit Issued, 2020 Q2**

Planning District	Very Low Income	Low Income	Moderate Income	TBD	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
Bernal Heights	-	-	-	9	9	104	8.7%
Buena Vista	-	-	-	-	-	351	0.0%
Central	-	-	-	2	2	169	1.2%
Downtown	-	-	-	20	20	636	3.1%
Ingleside	-	-	-	284	284	4,739	6.0%
Inner Sunset	-	-	-	-	-	61	0.0%
Marina	-	-	-	-	-	90	0.0%
Mission	-	13	30	2	45	723	6.2%
Northeast	-	-	-	5	5	438	1.1%
Outer Sunset	-	-	3	-	3	224	1.3%
Presidio	-	-	-	-	-	-	N/A
Richmond	-	-	-	-	-	359	0.0%
South Bayshore	-	-	72	2,881	2,953	12,241	24.1%
South Central	-	-	-	152	152	900	16.9%
South of Market	-	183	25	1,925	2,133	11,345	18.8%
Treasure Island	-	-	-	-	-	-	N/A
Western Addition	-	-	-	13	13	151	8.6%
<b>Totals</b>	<b>-</b>	<b>196</b>	<b>130</b>	<b>5,293</b>	<b>5,619</b>	<b>32,531</b>	<b>17.3%</b>

**Table 5**  
**New Housing Production by Affordability, 2010 Q3 – 2020 Q2**

Planning District	Very Low Income	Low Income	Moderate Income	Middle Income	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
Bernal Heights	-	-	2	-	2	60	3.3%
Buena Vista	149	81	52	-	282	1,124	25.1%
Central	-	18	4	-	22	354	6.2%
Downtown	601	468	229	-	1,298	4,728	27.5%
Ingleside	70	29	23	-	122	565	21.6%
Inner Sunset	-	-	1	-	1	99	1.0%
Marina	-	-	12	-	12	388	3.1%
Mission	169	191	39	-	399	2,024	19.7%
Northeast	178	2	39	-	219	823	26.6%
Outer Sunset	-	-	7	-	7	68	10.3%
Presidio	-	-	-	-	-	161	0.0%
Richmond	182	37	19	-	238	518	45.9%
South Bayshore	933	354	99	-	1,386	1,995	69.5%
South Central	54	2	16	-	72	77	93.5%
South of Market	774	1,271	193	-	2,238	13,892	16.1%
Treasure Island	-	-	-	-	-	-	N/A
Western Addition	220	278	91	-	589	1,712	34.4%
<b>Totals</b>	<b>3,330</b>	<b>2,731</b>	<b>826</b>	<b>-</b>	<b>6,887</b>	<b>28,588</b>	<b>24.1%</b>

**Table 6a**  
**Acquisitions and Rehabilitation of**  
**Affordable Housing, 2010 Q3—2020 Q2**

Planning District ▼	No. of Building ▼	No. of Units ▼
Bernal Heights	9	328
Buena Vista	4	190
Central	1	8
Downtown	14	1,136
Ingleside	-	-
Inner Sunset	-	-
Marina	-	-
Mission	15	393
Northeast	6	461
Outer Sunset	1	6
Presidio	-	-
Richmond	2	28
South Bayshore	1	223
South Central	1	21
South of Market	5	838
Treasure Island	-	-
Western Addition	8	622
<b>Totals</b>	<b>67</b>	<b>4,254</b>

**Table 6b**  
**Small Sites Program Acquisitions, 2014—2020 Q2**

Planning District ▼	No. of Building ▼	No. of Units ▼
Bernal Heights	5	28
Buena Vista	2	12
Central	1	8
Downtown	2	20
Ingleside	-	-
Inner Sunset	-	-
Marina	-	-
Mission	10	81
Northeast	2	37
Outer Sunset	1	6
Presidio	-	-
Richmond	2	28
South Bayshore	-	-
South Central	1	21
South of Market	2	42
Treasure Island	-	-
Western Addition	3	27
<b>Totals</b>	<b>31</b>	<b>310</b>



**Table 7**  
**RAD Affordable Units, 2015-2020 Q2**

Planning District ▼	No. of Building ▼	No. of Units ▼
<b>Bernal Heights</b>	2	268
<b>Buena Vista</b>	2	132
<b>Central</b>	1	107
<b>Downtown</b>	3	284
<b>Ingleside</b>	-	-
<b>Inner Sunset</b>	1	109
<b>Marina</b>	2	138
<b>Mission</b>	1	91
<b>Northeast</b>	4	576
<b>Outer Sunset</b>	-	-
<b>Presidio</b>	-	-
<b>Richmond</b>	2	144
<b>South Bayshore</b>	2	436
<b>South Central</b>	-	-
<b>South of Market</b>	1	276
<b>Treasure Island</b>	-	-
<b>Western Addition</b>	7	919
<b>Totals</b>	<b>28</b>	<b>3,480</b>

**Table 8**  
**Units Removed from Protected Status, 2010 Q3—2020 Q2**

Planning District	Condo Conversion	Demolition	Ellis Act	Owner Move-In	Units Removed from Protected Status
<b>Bernal Heights</b>	6	18	56	101	181
<b>Buena Vista</b>	5	3	71	111	190
<b>Central</b>	23	14	80	198	315
<b>Downtown</b>	-	68	48	4	120
<b>Ingleside</b>	-	35	30	128	193
<b>Inner Sunset</b>	5	12	60	98	175
<b>Marina</b>	11	4	35	114	164
<b>Mission</b>	4	30	279	251	564
<b>Northeast</b>	11	8	148	125	292
<b>Outer Sunset</b>	-	69	79	311	459
<b>Presidio</b>	-	-	-	-	-
<b>Richmond</b>	5	24	148	341	518
<b>South Bayshore</b>	-	11	12	83	106
<b>South Central</b>	-	53	62	329	444
<b>South of Market</b>	2	18	35	65	120
<b>Treasure Island</b>	-	-	-	-	-
<b>Western Addition</b>	7	7	32	132	178
<b>Totals</b>	<b>79</b>	<b>374</b>	<b>1,175</b>	<b>2,391</b>	<b>4,019</b>



# SAN FRANCISCO PLANNING DEPARTMENT

MEMO

## Memo to the Planning Commission

Hearing Date: April 22, 2021

**DATE:** 16 April 2021  
**PROJECT NAME:** HOUSING BALANCE REPORT NO. 12  
1 Jan 2011 – 31 Dec 2020  
**STAFF CONTACT:** John Boldrick, Senior Administrative Analyst  
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### SUMMARY

This report is submitted in compliance with Ordinance No. 53-15 requiring the Planning Department to monitor and report on the housing balance between new market rate and new affordable housing production. One of the stated purposes of the Housing Balance is “to ensure that data on meeting affordable housing targets citywide and within neighborhoods informs the approval process for new housing development.” This report is the twelfth in the series and covers the ten-year period from 1 January 2011 through 31 December 2020. The report is published twice annually in April and October.

The ordinance defines the “Housing Balance” as the proportion of all new affordable housing units to the total number of all new housing units for a 10-year “Housing Balance Period,” accounting for any loss of units removed from “protected status.”<sup>1</sup> In addition, the reporting must include a calculation of “Projected Housing Balance” which is focused exclusively on forward-looking housing production and includes residential projects that have received approvals from the Planning Commission or Planning Department, including projects under construction, permitted for construction, and those entitled but that have not yet received permits to commence construction.

In the 2011 Q1 – 2020 Q4 Housing Balance Period, the Cumulative Housing Balance is 18.1%, which is lower than the previous period (22.7% for 2010 Q1 – 2019 Q4). The Expanded Citywide Cumulative Housing Balance is 22.3%, which is lower than the previous period (27.1% for 2010 Q3 – 2020 Q2), although this varies by Supervisor district. Distribution of the Expanded Cumulative Housing Balance over the 11 Board of Supervisor Districts ranges from -73.9% (District 4) to 54.6% (District 5), which is shorter in overall range compared to the previous period (-89.0% (District 4) to 69.6% (District 3)). This variation, especially with negative housing balances, is due to the large number of units permanently withdrawn from

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<sup>1</sup> Units under “protected status” include units that are subject to rent control under the City’s Residential Rent Stabilization and Arbitration Ordinance.

rent control protection relative to the number of total net new units and net affordable units built in those districts.

The Projected Housing Balance Citywide is 17.3%, slightly lower than the 20.0% projection for the previous 10-year period. The ordinance specifically excludes master planned multi-phase development projects from the projected housing balance calculations until site permits are obtained. As such, the following projects were identified for exclusion: Balboa Reservoir, Hunters View, India Basin, Mission Rock, Pier 70, and Schlage Lock.

The Projected Housing Balance methodology as required by the ordinance is not necessarily an accurate predictor of current or future affordable housing production, as it does not account for the expected (but not yet entitled or permitted) affordable housing projects with funding either in hand or expected by the City. Examples of these projects include those funded through inclusionary fees paid by housing projects otherwise included in the Balance calculation, jobs-housing linkage fees paid by commercial development, voter-approved bonds, and other sources of funding. For the past ten years, affordable housing production has accounted for 24% of overall production.

## BACKGROUND

On 21 April 2015, the Board of Supervisors passed Ordinance No. 53-15 amending the *Planning Code* to include a new *Section 103* requiring the Planning Department to monitor and report on the Housing Balance between new market rate housing and new affordable housing production. The *Housing Balance Report* is submitted bi-annually by April 1 and October 1 of each year and published on the Planning Department's website. *Planning Code Section 103* also requires an annual hearing at the Board of Supervisors on strategies for achieving and maintaining the required housing balance in accordance with the City's housing production goals. (See *Appendix A* for complete text of Ordinance No. 53-15.) This hearing typically accompanies the April report.

On July 16 and July 27, 2020, staff provided an update to the Planning Commission and the Board of Supervisors, respectively, on anticipated delays on the delivery of several housing and area plan monitoring reports due to the COVID-19 pandemic, deployment of staff as disaster service workers, and unfilled vacancies on the Data and Analytics Team. Since that time, the Planning Department has restructured to consolidate existing data analysts into a single team, moving the data team to the Administration Division for easier collaboration with the IT Team, and recruiting for data team vacancies to meet existing mandatory reporting requirements and emerging data analysis needs for the Department. *Housing Balance Report No. 11*, which covers the 10-year period of 1 July 2010 through 30 June 2020 (provided under separate cover), and this *Housing Balance Report No. 12*, which covers the 10-year period of 1 January 2011 through 31 December 2020, are submitted to meet the October 2020 and April 2021 housing balance reporting requirements, respectively.

The stated purposes for the Housing Balance Monitoring and Reporting are: a) to maintain a balance between new affordable and market rate housing Citywide and within neighborhoods; b) to make housing available for all income levels and housing need types; c) to preserve the mixed-income character of the City and its neighborhoods; d) to offset the withdrawal of existing

housing units from rent stabilization and the loss of single-room occupancy hotel units; e) to ensure the availability of land and encourage the deployment of resources to provide sufficient housing affordable to households of very low, low, and moderate incomes; f) to ensure adequate housing for families, seniors and the disabled communities; g) to ensure that data on meeting affordable housing targets Citywide and within neighborhoods informs the approval process for new housing development; and h) to enable public participation in determining the appropriate mix of new housing approvals.

Housing production targets adopted by the State and the Association of Bay Area Governments, and reflected in the City's *Housing Element*, last adopted in April 2015, calls for a minimum of 28,870 new units to be built in San Francisco between 2015 and 2022, including a minimum of 16,333 affordable units (57%<sup>2</sup> of the total). As mandated by law, the City provides the State Department of Housing and Community Development an annual progress report.<sup>3</sup> In addition, in November 2014, San Francisco's voters endorsed Proposition K, which set as city policy a goal to help construct or rehabilitate at least 30,000 homes by 2020, at least 33% of which will be affordable to low- and moderate-income households.<sup>4</sup> While the *Housing Balance Report* is intended to supplement analysis towards adopted City housing goals, the report and its calculations do not specifically track performance toward meeting goals set by the City's *Housing Element*/RHNA and Proposition K and are not comparable because the metrics and methodologies differ.

This *Housing Balance Report* was prepared from data gathered from other published sources including the Planning Department's annual *Housing Inventory* and quarterly *Pipeline Report* data, Department of Building Inspection data, San Francisco Rent Board data, and affordable housing data from the Mayor's Office of Housing and Community Development.

## CUMULATIVE HOUSING BALANCE CALCULATION

*Planning Code Section 103* calls for the Housing Balance "be expressed as a percentage, obtained by dividing the cumulative total of extremely low, very low, low, and moderate income affordable housing (all units 0-120% AMI) minus the lost protected units, by the total number of net new housing units within the Housing Balance Period." The ordinance requires that the "Cumulative Housing Balance" be provided using two calculations: a) one consisting of net housing built within a 10 year Housing Balance period, less units withdrawn from protected status, plus net units in projects that have received both approvals from the Planning Commission or Planning Department and site permits from the Department of Building Inspection, and b) the addition of net units gained through acquisition and rehabilitation of

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<sup>2</sup> The Ordinance inaccurately stated that "22% of new housing demands to be affordable to households of moderate means." San Francisco's Regional Housing Needs Assessment (RHNA) allocation for moderate income households is 19% of total production goals.

<sup>3</sup> Printed annual progress reports submitted by all California jurisdictions can be accessed here – <http://www.hcd.ca.gov/community-development/housing-element/annual-progress-reports/index.php> -- or by calling HCD at 916-263-2911 for the latest reports as many jurisdictions now file reports online.

<sup>4</sup> For tracking of the Prop K affordable housing goal, see <https://sfmohcd.org>.

affordable units, HOPE SF and RAD units<sup>5</sup>. “Protected units” include units that are subject to rent control under the City’s Residential Rent Stabilization and Arbitration Ordinance. Additional elements that figure into the Housing Balance include completed HOPE SF and RAD public housing replacement, substantially rehabilitated units, and single-room occupancy hotel units (SROs). The equation below shows the second, expanded calculation of the Cumulative Housing Balance.

<div> [Net New Affordable Housing +  Completed Acquisitions &amp; Rehabs + Completed  HOPE SF + RAD Public Housing Replacement +  Entitled &amp; Permitted Affordable Units]  – [Units Removed from Protected Status] </div> <hr/> <div> [Net New Housing Built + Net Entitled &amp; Permitted Units] </div>	=	<b>EXPANDED CUMULATIVE HOUSING BALANCE</b>
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The first “Housing Balance Period” is a ten-year period starting with the first quarter of 2005 through the last quarter of 2014. Subsequent housing balance reports will cover the 10 years preceding the most recent quarter. This report covers January 2011 (Q1) through December 2020 (Q4).

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<sup>5</sup> HOPESF and Rental Assistance Demonstration (RAD) Program units are deed-restricted affordable units that have been acquired and rehabilitated.

Table 1A below shows that the Cumulative Housing Balance for 10-year 2011 Q1—2020 Q4 period is 18.1% citywide. With the addition of RAD units, the Expanded Cumulative Housing Balance is 22.8%. The expanded Cumulative Housing Balance for the previous 10-year 2010 Q3—2020 Q2 period was 27.1%. In 2016, the Board of Supervisors revised the ordinance to include Owner Move-Ins (OMIs)<sup>6</sup> in the “Units Removed from Protected Status” section of the Housing Balance calculation. Although OMIs were not specifically called out by in the original Ordinance in the calculation of the Housing Balance, these were included in earlier reports because this type of no-fault eviction results in the loss of rent-controlled units either permanently or for a period of time.

**Table 1A**  
**Cumulative Housing Balance Calculation, 2011 Q1—2020 Q4**

Bos District	Net New Affordable Housing Built	Acquisitions, Rehabs & Small Sites Complete	Total Entitled & Permitted Affordable Uni	Units Removed from Protected Status	Total Net New Units Built	Total Entitled & Permitted Uni	Cumulative Housing Balan
BoS Dist. 1	48	56	-	464	319	451	-46.8%
BoS Dist. 2	67	-	41	281	931	704	-10.6%
BoS Dist. 3	295	353	274	288	1,092	1,147	28.3%
BoS Dist. 4	17	44	10	461	139	389	-73.9%
BoS Dist. 5	669	478	155	317	1,673	1,609	30.0%
BoS Dist. 6	3,463	1,573	3,488	142	16,868	19,507	23.0%
BoS Dist. 7	107	-	286	221	578	5,821	2.7%
BoS Dist. 8	243	32	29	602	1,501	654	-13.8%
BoS Dist. 9	322	427	724	621	1,282	2,139	24.9%
BoS Dist. 10	1,819	-	3,766	282	6,060	18,562	21.5%
BoS Dist. 11	41	16	137	390	393	649	-18.8%
<b>Totals</b>	<b>7,091</b>	<b>2,979</b>	<b>8,910</b>	<b>4,069</b>	<b>30,836</b>	<b>51,632</b>	<b>18.1%</b>

<sup>6</sup> Owner Move-In (OMI) Evictions occur when a landlord or property owner recovers possession of a rental unit for the occupancy of the owner or relative of the owner for use as their principal residence for a period of at least 36 continuous months. This information is collected from the Rent Board.

Table 1B below shows the Expanded Cumulative Housing Balances for Board of Supervisor Districts, ranging from -73.9% (District 4) to 54.6% (District 5). Negative balances in Districts 1 (21.8%), 4 (-73.9%), and 11 (-18.8%) resulted from the units removed from protected status relative to the net new affordable housing and net new housing units built in those districts.

**Table 1B**  
**Expanded Cumulative Housing Balance Calculation, 2011 Q1—2020 Q4**

Bos District	Net New Affordable Housing Built	Acquisitions, Rehabs & Small Sites Complete	RAD Program and Hope SF Replacement Units	Total Entitled & Permitted Affordable Uni	Units Removed from Protected Status	Total Net New Units Built	Total Entitled & Permitted Units	Expanded Cumulative Housing Balan
BoS Dist. 1	48	56	144	-	464	319	451	-28.1%
BoS Dist. 2	67	-	251	41	281	931	704	4.8%
BoS Dist. 3	295	353	576	274	288	1,092	1,147	54.0%
BoS Dist. 4	17	44	-	10	461	139	389	-73.9%
BoS Dist. 5	669	478	806	155	317	1,673	1,609	54.6%
BoS Dist. 6	3,463	1,573	560	3,488	142	16,868	19,507	24.6%
BoS Dist. 7	107	-	109	286	221	578	5,821	4.4%
BoS Dist. 8	243	32	330	29	602	1,501	654	1.5%
BoS Dist. 9	322	427	268	724	621	1,282	2,139	32.7%
BoS Dist. 10	1,819	-	436	3,766	282	6,060	18,562	23.3%
BoS Dist. 11	41	16	-	137	390	393	649	-18.8%
<b>Totals</b>	<b>7,091</b>	<b>2,979</b>	<b>3,480</b>	<b>8,910</b>	<b>4,069</b>	<b>30,836</b>	<b>51,632</b>	<b>22.3%</b>

## PROJECTED HOUSING BALANCE

Table 2 below summarizes residential projects that have received entitlements from the Planning Commission or the Planning Department, have received an approved building permit from the Department of Building Inspection (DBI), or are currently under construction. Table 2 is the summary of Tables 3 and 4, thus providing a projected housing balance that includes any residential project that has received approval from the Planning Commission and Planning Department, as required by the ordinance.

Overall projected housing balance at the end of 2020 Q4 is 17.3%; for the previous 10-year reporting period, this projected balance was 20.0%. The projected balance is also expected to change as several major projects have yet to declare how their affordable housing requirements will be met. In addition, six (6) entitled major development projects—Balboa Reservoir, Hunters View, India Basin, Mission Rock, Pier 70, and Schlage Lock—are not included in the accounting until site or building permits are issued as specified in the ordinance.

As established by the ordinance, the Projected Housing Balance also does not account for affordable housing units that will be produced with current and future affordable housing funding (e.g. Inclusionary Housing Fee, Jobs-Housing Linkage Fee, bond funds), including funds owed or already paid by projects in a given reporting cycle. Those affordable housing units are produced several years after the fee is collected. Units produced through the fee typically serve lower income households than do the inclusionary units, including special needs populations requiring services, such as seniors, transitional aged youth, families, and veterans.



Table 2

Projected Housing Balance (Entitled, Permitted, and Under Construction Units), 2020 Q4

Bos District	Very Low Income	Low Income	Moderate Income	TBD	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
BoS Dist. 1	-	-	-	-	-	451	0.0%
BoS Dist. 2	-	-	-	41	41	704	5.8%
BoS Dist. 3	-	10	-	264	274	1,147	23.9%
BoS Dist. 4	-	-	10	-	10	389	2.6%
BoS Dist. 5	-	18	53	84	155	1,609	9.6%
BoS Dist. 6	-	448	174	2,866	3,488	19,507	17.9%
BoS Dist. 7	-	-	-	286	286	5,821	4.9%
BoS Dist. 8	-	-	22	7	29	654	4.4%
BoS Dist. 9	-	562	65	97	724	2,139	33.8%
BoS Dist. 10	60	366	124	3,216	3,766	18,562	20.3%
BoS Dist. 11	-	-	-	137	137	649	21.1%
<b>Totals</b>	<b>60</b>	<b>1,404</b>	<b>448</b>	<b>6,998</b>	<b>8,910</b>	<b>51,632</b>	<b>17.3%</b>

## Permitted and Under Construction Units

Table 3 below lists the number of units that have received approved building permits or are currently under construction in 2019 Q4. Fifty-two percent (52%) of these units will be built in or are currently being built in District 6. Another 14% will be built in or are currently being built in District 10. Of all units that have received approved permits from DBI or are currently under construction, 20% will be affordable.

**Table 3**  
**Building Permits Approved or Under Construction, 2020 Q4**

Bos District	Very Low Income	Low Income	Moderate Income	TBD	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
BoS Dist. 1	-	-	-	-	-	248	0.0%
BoS Dist. 2	-	-	-	23	23	247	9.3%
BoS Dist. 3	-	10	-	258	268	539	49.7%
BoS Dist. 4	-	-	7	-	7	285	2.5%
BoS Dist. 5	-	18	53	71	142	1,106	12.8%
BoS Dist. 6	-	416	149	1,146	1,711	8,664	19.7%
BoS Dist. 7	-	-	-	2	2	1,071	0.2%
BoS Dist. 8	-	-	22	-	22	364	6.0%
BoS Dist. 9	-	562	35	88	685	1,407	48.7%
BoS Dist. 10	60	202	52	112	426	2,426	17.6%
BoS Dist. 11	-	-	-	132	132	417	31.7%
<b>Totals</b>	<b>60</b>	<b>1,208</b>	<b>318</b>	<b>1,832</b>	<b>3,418</b>	<b>16,774</b>	<b>20.4%</b>

## Entitled Units

Table 4 below lists the number of units that have received entitlements from the Planning Commission or the Planning Department in 2020 Q2. Six (6) entitled major development projects—Balboa Reservoir, Hunters View, India Basin, Mission Rock, Pier 70, and Schlage Lock—are not included in the accounting as specified in the ordinance. Forty-six percent (46%) of these units will be built in District 10, and 31% in District 6. Of all units that have received Planning entitlements, 16% will be affordable.

**Table 4**  
**Entitled Units without a Building Permit Issued, 2020 Q4**

Bos District	Very Low Income	Low Income	Moderate Income	TBD	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
BoS Dist. 1	-	-	-	-	-	203	0.0%
BoS Dist. 2	-	-	-	18	18	457	3.9%
BoS Dist. 3	-	-	-	6	6	608	1.0%
BoS Dist. 4	-	-	3	-	3	104	2.9%
BoS Dist. 5	-	-	-	13	13	503	2.6%
BoS Dist. 6	-	32	25	1,720	1,777	10,843	16.4%
BoS Dist. 7	-	-	-	284	284	4,750	6.0%
BoS Dist. 8	-	-	-	7	7	290	2.4%
BoS Dist. 9	-	-	30	9	39	732	5.3%
BoS Dist. 10	-	164	72	3,104	3,340	16,136	20.7%
BoS Dist. 11	-	-	-	5	5	232	2.2%
<b>Totals</b>	-	<b>196</b>	<b>130</b>	<b>5,166</b>	<b>5,492</b>	<b>34,858</b>	<b>15.8%</b>

## CUMULATIVE HOUSING BALANCE ELEMENTS

Because the scope covered by the Housing Balance calculation is broad, each element – or group of elements – will be discussed separately. The body of this report will account for figures at the Board of Supervisor district level. The breakdown of each element using the Planning Department District geographies, as required by *Section 103*, is provided separately in *Appendix B*. This is to ensure simple and uncluttered tables in the main body of the report.

### Affordable Housing and Net New Housing Production

Table 5 below shows housing production between 2011 Q1 and 2020 Q4. This ten-year period resulted in a net addition of 30,836 units to the City's housing stock, including 7,091 affordable units (or approximately 23%). Most of the net new housing units and affordable units built in the ten-year reporting period were in District 6 (16,868 and 3,463 units respectively). District 10 follows with 6,060 net new units, including 1,819 affordable units.

The table below also shows that approximately 23% of net new units built between 2011 Q1 and 2020 Q4 were affordable units. Nearly half (49%) of the affordable units built during that period were in District 6, and 26% in District 10.

**Table 5**  
**New Housing Production by Affordability, 2011 Q1 – 2020 Q4<sup>7</sup>**

Bos District	Very Low Income	Low Income	Moderate Income	Middle Income	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
BoS Dist. 1	20	-	28	-	48	319	15.0%
BoS Dist. 2	-	-	67	-	67	931	7.2%
BoS Dist. 3	178	54	63	-	295	1,092	27.0%
BoS Dist. 4	-	-	17	-	17	139	12.2%
BoS Dist. 5	249	298	122	-	669	1,673	40.0%
BoS Dist. 6	1,237	1,714	512	-	3,463	16,868	20.5%
BoS Dist. 7	70	29	8	-	107	578	18.5%
BoS Dist. 8	117	99	27	-	243	1,501	16.2%
BoS Dist. 9	93	197	32	-	322	1,282	25.1%
BoS Dist. 10	976	665	178	-	1,819	6,060	30.0%
BoS Dist. 11	-	2	39	-	41	393	10.4%
<b>Totals</b>	<b>2,940</b>	<b>3,058</b>	<b>1,093</b>	<b>-</b>	<b>7,091</b>	<b>30,836</b>	<b>23.0%</b>

<sup>7</sup> It should be noted that units affordable to Extremely Very Low Income (EVLI) households are included under the Very Low Income (VLI) category because certain projects that benefit homeless individuals and families – groups considered as EVLI – have income eligibility caps at the VLI level.

## Acquisition and Rehabilitation of Affordable Housing Units

Table 6a below lists the number of units that have been rehabilitated and/or acquired between 2011 Q1 and 2020 Q4 to ensure permanent affordability. These are mostly single-room occupancy hotel units that are affordable to extremely very low and very low-income households.

**Table 6a**

**Acquisitions and Rehabilitation of Affordable Housing, 2011 Q1—2020 Q4**

Bos District ▼	No. of Building ▼	No. of Units ▼
BoS Dist. 1	2	28
BoS Dist. 2	-	-
BoS Dist. 3	8	299
BoS Dist. 4	4	34
BoS Dist. 5	9	444
BoS Dist. 6	19	1,541
BoS Dist. 7	-	-
BoS Dist. 8	2	27
BoS Dist. 9	13	359
BoS Dist. 10	-	-
BoS Dist. 11	1	16
Totals	58	2,748

## Small Sites Program

The San Francisco Small Sites Program (SSP) is an initiative of the Mayor's Office of Housing and Community Development (MOHCD) to acquire small rent-controlled buildings (with four to 25 units) where tenants are at risk of eviction through the Ellis Act <sup>8</sup>or owner move-ins. Since its inception in 2014, some 25 buildings with 231 units have been acquired.

**Table 6b**  
**Small Sites Program, 2014—2020 Q4**

Bos District	No. of Building	No. of Units
BoS Dist. 1	2	28
BoS Dist. 2	-	-
BoS Dist. 3	3	54
BoS Dist. 4	2	10
BoS Dist. 5	4	34
BoS Dist. 6	4	32
BoS Dist. 7	-	-
BoS Dist. 8	1	5
BoS Dist. 9	9	68
BoS Dist. 10	-	-
BoS Dist. 11	-	-
<b>Totals</b>	<b>25</b>	<b>231</b>

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<sup>8</sup> Ellis Act evictions occur when a landlord withdraws the rental unit from the residential rental housing market.

## RAD Program

The San Francisco Housing Authority's Rental Assistance Demonstration (RAD) program preserves at risk public and assisted housing projects. According to the Mayor's Office, RAD Phase I transferred 1,425 units to developers in December 2015. An additional 2,055 units were transferred as Phase II in 2016.

**Table 7**  
**RAD Affordable Units, 2015-2020 Q4**

Bos District	No. of Building	No. of Units
BoS Dist. 1	2	144
BoS Dist. 2	3	251
BoS Dist. 3	4	576
BoS Dist. 4	-	-
BoS Dist. 5	6	806
BoS Dist. 6	4	560
BoS Dist. 7	1	109
BoS Dist. 8	4	330
BoS Dist. 9	2	268
BoS Dist. 10	2	436
BoS Dist. 11	-	-
<b>Totals</b>	<b>28</b>	<b>3,480</b>

## Units Removed from Protected Status

San Francisco's Residential Rent Stabilization and Arbitration Ordinance protects tenants and preserves affordability of about 175,000 rental units by limiting annual rent increases. Landlords can, however, terminate tenants' leases through no-fault that are not the tenants' fault. The Housing Balance calculation takes into account units permanently withdrawn from rent stabilization as loss of affordable housing. The following no-fault evictions affect the supply of rent-controlled units by removing units from the rental market: condo conversion, demolition, Ellis Act, and owner move-ins (OMIs). It should be noted that initially, OMIs were not specifically called out by the Ordinance to be included in the calculation. However, because owner move-ins have the effect of the losing rent-controlled units either permanently or for a substantial period of time, these numbers are included in the Housing Balance calculation as intended by the legislation's sponsors. Some of these OMI units may return to being rentals and will still fall under the rent control ordinance. On 14 November 2016, the Board of Supervisors amended Planning Code Section 103 to include OMIs as part of the housing balance calculation.

Table 8 below shows the distribution of no-fault eviction notices issued between January 2011 and December 2020. Eviction notices have been commonly used as proxy for evictions. Owner Move-In and Ellis Act notices made up most of no-fault evictions (59% and 30% respectively).

Distribution of these no-fault eviction notices is almost evenly dispersed, with Districts 8 and 9 leading (each with approximately 15% of the total units removed from protected status).

**Table 8**  
**Units Removed from Protected Status, 2011 Q1 – 2020 Q4**

Bos District	Condo Conversion	Demolition	Ellis Act	Owner Move-In	Units Removed from Protected Status
BoS Dist. 1	3	20	127	314	464
BoS Dist. 2	18	9	72	182	281
BoS Dist. 3	6	7	159	116	288
BoS Dist. 4	-	69	81	311	461
BoS Dist. 5	16	12	77	212	317
BoS Dist. 6	-	75	55	12	142
BoS Dist. 7	-	28	57	136	221
BoS Dist. 8	27	26	228	321	602
BoS Dist. 9	8	43	241	329	621
BoS Dist. 10	2	26	51	203	282
BoS Dist. 11	-	59	66	265	390
<b>Totals</b>	<b>80</b>	<b>374</b>	<b>1,214</b>	<b>2,401</b>	<b>4,069</b>

## PERIODIC REPORTING AND ONLINE ACCESS

This report complies with the *Planning Code Section 103* requirement that the Planning Department publish and update the *Housing Balance Report* bi-annually on April 1 and October 1 of each year. *Housing Balance Reports* are available online, as mandated by the ordinance, by going to this link: <https://sfplanning.org/housing-balance-report>.

## ANNUAL HEARING

A hearing on the Housing Balance before the Board of Supervisors is scheduled each year. The Mayor's Office of Housing and Community Development, the Mayor's Office of Economic and Workforce Development, the Rent Stabilization Board, the Department of Building Inspection, and the City Economist will present strategies for achieving and maintaining a housing balance consistent with the City's housing goals at this annual hearing. The ordinance also requires that MOHCD will determine the amount of funding needed to bring the City into the required minimum 33% should the cumulative housing balance fall below that threshold.



APPENDIX A  
Ordinance 53-15

	AMENDED IN COMMITTEE 4/6/15	ORDINANCE NO. 53-15
1	[Planning Code - City Housing Balance Monitoring and Reporting]	
2		
3	Ordinance amending the Planning Code to require the Planning Department to monitor	
4	the balance between new market rate housing and new affordable housing, and publish	
5	a bi-annual Housing Balance Report; requiring an annual hearing at the Board of	
6	Supervisors on strategies for achieving and maintaining the required housing balance	
7	in accordance with San Francisco's housing production goals; and making	
8	environmental findings, Planning Code, Section 302 findings, and findings of	
9	consistency with the General Plan, and the eight priority policies of Planning Code,	
10	Section 101.1.	
11		
12	NOTE: Unchanged Code text and uncodified text are in plain Arial font.	
13	Additions to Codes are in <u>single-underline italics Times New Roman font</u> .	
14	Deletions to Codes are in <del>strikethrough italics Times New Roman font</del> .	
15	Board amendment additions are in <u>double-underlined Arial font</u> .	
16	Board amendment deletions are in <del>strikethrough Arial font</del> .	
17	Asterisks (* * * *) indicate the omission of unchanged Code	
18	subsections or parts of tables.	
19		
20	Be it ordained by the People of the City and County of San Francisco:	
21		
22	Section 1. Findings.	
23	(a) The Planning Department has determined that the actions contemplated in this	
24	ordinance comply with the California Environmental Quality Act (California Public Resources	
25	Code Sections 21000 et seq.). Said determination is on file with the Clerk of the Board of	
	Supervisors in File No. 150029 and is incorporated herein by reference. The Board of	
	Supervisors affirms this determination.	
	(b) On March 19, 2015, the Planning Commission, in Resolution No. 19337, adopted	
	findings that the actions contemplated in this ordinance are consistent, on balance, with the	
	Supervisor Kim	
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1 adopts these findings as its own. A copy of said Resolution is on file with the Clerk of the  
2 Board of Supervisors in File No. 150029, and is incorporated herein by reference.

3 (c) Pursuant to Planning Code Section 302, this Board finds that this Planning Code  
4 Amendment will serve the public necessity, convenience, and welfare for the reasons set forth  
5 in Planning Commission Resolution No. 150029 and the Board incorporates such reasons  
6 herein by reference.

7  
8 Section 2. The Planning Code is hereby amended by adding new Section 103 to read  
9 as follows:

10 **SEC. 103. HOUSING BALANCE MONITORING AND REPORTING.**

11 **(a) Purposes.** *To maintain a balance between new affordable and market rate housing City-*  
12 *wide and within neighborhoods, to make housing available for all income levels and housing need*  
13 *types, to preserve the mixed income character of the City and its neighborhoods, to offset the*  
14 *withdrawal of existing housing units from rent stabilization and the loss of single-room-occupancy*  
15 *hotel units, to ensure the availability of land and encourage the deployment of resources to provide*  
16 *sufficient housing affordable to households of very low, low, and moderate incomes, to ensure adequate*  
17 *housing for families, seniors and the disabled community, to ensure that data on meeting affordable*  
18 *housing targets City-wide and within neighborhoods informs the approval process for new housing*  
19 *development, and to enable public participation in determining the appropriate mix of new housing*  
20 *approvals, there is hereby established a requirement, as detailed in this Section 103, to monitor and*  
21 *regularly report on the housing balance between market rate housing and affordable housing.*

22 **(b) Findings.**

23 *(1) In November 2014, the City voters enacted Proposition K, which established City*  
24 *policy to help construct or rehabilitate at least 30,000 homes by 2020. More than 50% of this housing*  
25 *would be affordable for middle-class households, with at least 33% affordable for low- and moderate-*

1 income households, and the City is expected to develop strategies to achieve that goal. This section  
2 103 sets forth a method to track performance toward the City's Housing Element goals and the near-  
3 term Proposition K goal that 33% of all new housing shall be affordable housing, as defined herein.

4 (2) The City's rent stabilized and permanently affordable housing stock serves very low-  
5 low-, and moderate-income families, long-time residents, elderly seniors, disabled persons and others.  
6 The City seeks to achieve and maintain an appropriate balance between market rate housing and  
7 affordable housing City-wide and within neighborhoods because the availability of decent housing and  
8 a suitable living environment for every San Franciscan is of vital importance. Attainment of the City's  
9 housing goals requires the cooperative participation of government and the private sector to expand  
10 housing opportunities to accommodate housing needs for San Franciscans at all economic levels and to  
11 respond to the unique needs of each neighborhood where housing will be located.

12 (3) For tenants in unsubsidized housing, affordability is often preserved by the  
13 Residential Rent Stabilization and Arbitration Ordinance's limitations on the size of allowable rent  
14 increases during a tenancy. As documented in the Budget and Legislative Analyst's October 2013  
15 Policy Analysis Report on Tenant Displacement, San Francisco is experiencing a rise in units  
16 withdrawn from rent controls. Such rises often accompany periods of sharp increases in property  
17 values and housing prices. From 1998 through 2013, the Rent Board reported a total of 13,027 no-fault  
18 evictions (i.e., evictions in which the tenant had not violated any lease terms, but the owner sought to  
19 regain possession of the unit). Total evictions of all types have increased by 38.2% from Rent Board  
20 Year (i.e. from March through February) 2010 to Rent Board Year 2013. During the same period, Ellis  
21 Act evictions far outpaced other evictions, increasing by 169.8% from 43 in Rent Board Year 2010 to  
22 116 in Rent Board Year 2013. These numbers do not capture the large number of owner buyouts of  
23 tenants, which contribute further to the loss of rent-stabilized units from the housing market. Any fair  
24 assessment of the affordable housing balance must incorporate into the calculation units withdrawn  
25 from rent stabilization.

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1                   (4) Pursuant to Government Code Section 65584, the Association of Bay Area  
2                   Governments (ABAG), in coordination with the California State Department of Housing and  
3                   Community Development (HCD), determines the Bay Area's regional housing need based on regional  
4                   trends, projected job growth, and existing needs. The regional housing needs assessment (RHNA)  
5                   determination includes production targets addressing housing needs of a range of household income  
6                   categories. For the RHNA period covering 2015 through 2022, ABAG has projected that at least 38%  
7                   of new housing demands for San Francisco will be from very low and low income households  
8                   (households earning under 80% of area median income), and another 22% of new housing demands to  
9                   be affordable to households of moderate means (earning between 80% and 120% of area median  
10                  income). Market-rate housing is considered housing with no income limits or special requirements  
11                  attached.

12                  (5) The Housing Element of the City's General Plan states: "Based on the growing  
13                  population, and smart growth goals of providing housing in central areas like San Francisco, near jobs  
14                  and transit, the State Department of Housing and Community Development (HCD), with the  
15                  Association of Bay Area Governments (ABAG), estimates that in the current 2015-2022 Housing  
16                  Element period San Francisco must plan for the capacity for roughly 28,870 new units, 57% of which  
17                  should be suitable for housing for the extremely low, very low, low and moderate income households to  
18                  meet its share of the region's projected housing demand." Objective 1 of the Housing Element states  
19                  that the City should "identify and make available for development adequate sites to meet the City's  
20                  housing needs, especially permanently affordable housing." Objective 7 states that San Francisco's  
21                  projected affordable housing needs far outpace the capacity for the City to secure subsidies for new  
22                  affordable units.

23                  (6) In 2012, the City enacted Ordinance 237-12, the "Housing Preservation and  
24                  Production Ordinance," codified in Administrative Code Chapter 10E.4, to require Planning  
25                  Department staff to regularly report data on progress toward meeting San Francisco's quantified

1 production goals for different household income levels as provided in the General Plan's Housing  
2 Element. That Ordinance requires data on the number of units in all stages of the housing production  
3 process at various affordability levels to be included in staff reports on all proposed projects of five  
4 residential units or more and in quarterly housing production reports to the Planning Commission. The  
5 Planning Department has long tracked the number of affordable housing units and total number of  
6 housing units built throughout the City and in specific areas and should be able to track the ratio called  
7 for in this Section 103.

8 (7) As the private market has embarked upon, and government officials have urged, an  
9 ambitious program to produce significant amounts of new housing in the City, the limited remaining  
10 available land makes it essential to assess the impact of the approval of new market rate housing  
11 developments on the availability of land for affordable housing and to encourage the deployment of  
12 resources to provide such housing.

13 **(c) Housing Balance Calculation.**

14 (1) For purposes of this Section 103, "Housing Balance" shall be defined as the  
15 proportion of all new housing units affordable to households of extremely low, very low, low or  
16 moderate income households, as defined in California Health & Safety Code Sections 50079.5 et seq.,  
17 as such provisions may be amended from time to time, to the total number of all new housing units for a  
18 10 year Housing Balance Period.

19 (2) The Housing Balance Period shall begin with the first quarter of year 2005 to the  
20 last quarter of 2014, and thereafter for the ten years prior to the most recent calendar quarter.

21 (3) For each year that data is available, beginning in 2005, the Planning Department  
22 shall report net housing construction by income levels, as well as units that have been withdrawn from  
23 protection afforded by City law, such as laws providing for rent-controlled and single resident  
24 occupancy (SRO) units. The affordable housing categories shall include net new units, as well as  
25 existing units that were previously not restricted by deed or regulatory agreement that are acquired for



1 preservation as permanently affordable housing as determined by the Mayor's Office of Housing and  
2 Community Development (MOHCD) (not including refinancing or other rehabilitation under existing  
3 ownership), protected by deed or regulatory agreement for a minimum of 55 years. The report shall  
4 include, by year, and for the latest quarter, all units that have received Temporary Certificates of  
5 Occupancy within that year, a separate category for units that obtained a site or building permit, and  
6 another category for units that have received approval from the Planning Commission or Planning  
7 Department, but have not yet obtained a site or building permit to commence construction (except any  
8 entitlements that have expired and not been renewed during the Housing Balance Period). Master  
9 planned entitlements, including but not limited to such areas as Treasure Island, Hunters Point  
10 Shipyard and Park Merced, shall not be included in this latter category until individual building  
11 entitlements or site permits are approved for specific housing projects. For each year or approval  
12 status, the following categories shall be separately reported:

13 (A) Extremely Low Income Units, which are units available to individuals or  
14 families making between 0-30% Area Median Income (AMI) as defined in California Health & Safety  
15 Code Section 50106, and are subject to price or rent restrictions between 0-30% AMI;

16 (B) Very Low Income Units, which are units available to individuals or families  
17 making between 30-50% AMI as defined in California Health & Safety Code Section 50105, and are  
18 subject to price or rent restrictions between 30-50% AMI;

19 (C) Lower Income Units, which are units available to individuals or families  
20 making between 50-80% AMI as defined in California Health & Safety Code Section 50079.5, and are  
21 subject to price or rent restrictions between 50-80% AMI;

22 (D) Moderate Income Units, which are units available to individuals or families  
23 making between 80-120% AMI, and are subject to price or rent restrictions between 80-120% AMI;

24 (E) Middle Income Units, which are units available to individuals or families  
25 making between 120-150% AMI, and are subject to price or rent restrictions between 120-150% AMI;

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1 (F) Market-rate units, which are units not subject to any deed or regulatory  
2 agreement with price restrictions;

3 (G) Housing units withdrawn from protected status, including units withdrawn  
4 from rent control (except those units otherwise converted into permanently affordable housing),  
5 including all units that have been subject to rent control under the San Francisco Residential Rent  
6 Stabilization and Arbitration Ordinance but that a property owner removes permanently from the  
7 rental market through condominium conversion pursuant to Administrative Code Section 37.9(a)(9),  
8 demolition or alterations (including dwelling unit mergers), or permanent removal pursuant to  
9 Administrative Code Section 37.9(a)(10) or removal pursuant to the Ellis Act under Administrative  
10 Code Section 37.9(a)(13);

11 (H) Public housing replacement units and substantially rehabilitated units  
12 through the HOPE SF and Rental Assistance Demonstration (RAD) programs, as well as other  
13 substantial rehabilitation programs managed by MOHCD.

14 (4) The Housing Balance shall be expressed as a percentage, obtained by dividing the  
15 cumulative total of extremely low, very low, low and moderate income affordable housing units (all  
16 units 0-120% AMI) minus the lost protected units, by the total number of net new housing units within  
17 the Housing Balance Period. The Housing Balance shall also provide two calculations:

18 (A) the Cumulative Housing Balance, consisting of housing units that have  
19 already been constructed (and received a Temporary Certificate of Occupancy or other certificate that  
20 would allow occupancy of the units) within the 10-year Housing Balance Period, plus those units that  
21 have obtained a site or building permit. A separate calculation of the Cumulative Housing Balance  
22 shall also be provided, which includes HOPE SF and RAD public housing replacement and  
23 substantially rehabilitated units (but not including general rehabilitation / maintenance of public  
24 housing or other affordable housing units) that have received Temporary Certificates of Occupancy  
25

1 within the Housing Balance Period. The Housing Balance Reports will show the Cumulative Housing  
2 Balance with and without public housing included in the calculation; and

3 (B) the Projected Housing Balance, which shall include any residential project  
4 that has received approval from the Planning Commission or Planning Department, even if the  
5 housing project has not yet obtained a site or building permit to commence construction (except any  
6 entitlements that have expired and not been renewed during the Housing Balance period). Master  
7 planned entitlements shall not be included in the calculation until individual building entitlements or  
8 site permits are approved.

9 (d) **Bi-annual Housing Balance Reports.** Within 30 days of the effective date of this  
10 Section 103 By June 1, 2015, the Planning Department shall calculate the Cumulative and Projected  
11 Housing Balance for the most recent two quarters City-wide, by Supervisorial District, Plan Area, and  
12 by neighborhood Planning Districts, as defined in the annual Housing Inventory, and publish it as an  
13 easily visible and accessible page devoted to Housing Balance and Monitoring and Reporting on the  
14 Planning Department's website. By August September 1st and February March 1st of each year, the  
15 Planning Department shall publish and update the Housing Balance Report, and present this report at  
16 an informational hearing to the Planning Commission and Board of Supervisors, as well as to any  
17 relevant body with geographic purview over a plan area upon request, along with the other quarterly  
18 reporting requirements of Administrative Code Chapter 10E.4. The annual report to the Board of  
19 Supervisors shall be accepted by resolution of the Board, which resolution shall be introduced  
20 by the Planning Department. The Housing Balance Report shall also be incorporated into the  
21 Annual Planning Commission Housing Hearing and Annual Report to the Board of Supervisors  
22 required in Administrative Code Chapter 10E.4.

23 (e) **Annual Hearing by Board of Supervisors.**

24 (1) The Board of Supervisors shall hold a public Housing Balance hearing on an annual  
25 basis by April 1 of each year, to consider progress towards the City's affordable housing goals.

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1 including the goal of a minimum 33% affordable housing to low and moderate income households, as  
2 well as the City's General Plan Housing Element housing production goals by income category. The  
3 first hearing shall occur no later than 30 days after the effective date of this ordinance, and by April 1  
4 of each year thereafter.

5 (2) The hearing shall include reporting by the Planning Department, which shall present  
6 the latest Housing Balance Report City-wide and by Supervisorial District and Planning District; the  
7 Mayor's Office of Housing and Community Development, the Mayor's Office of Economic and  
8 Workforce Development, the Rent Stabilization Board, by the Department of Building Inspection, and  
9 the City Economist on strategies for achieving and maintaining a housing balance in accordance with  
10 San Francisco's housing production goals. If the Cumulative Housing Balance has fallen below 33% in  
11 any year, MOHCD shall determine how much funding is required to bring the City into a minimum  
12 33% Housing Balance and the Mayor shall submit to the Board of Supervisors a strategy to accomplish  
13 the minimum of 33% Housing Balance. City Departments shall at minimum report on the following  
14 issues relevant to the annual Housing Balance hearing: MOHCD shall report on the annual and  
15 projected progress by income category in accordance with the City's General Plan Housing Element  
16 housing production goals, projected shortfalls and gaps in funding and site control, and progress  
17 toward the City's Neighborhood Stabilization goals for acquiring and preserving the affordability of  
18 existing rental units in neighborhoods with high concentrations of low and moderate income  
19 households or historically high levels of evictions; the Planning Department shall report on current  
20 and proposed zoning and land use policies that affect the City's General Plan Housing Element  
21 housing production goals; the Mayor's Office of Economic and Workforce Development shall report on  
22 current and proposed major development projects, dedicated public sites, and policies that affect the

23  
24  
25  
  
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1 City's General Plan Housing Element housing production goals; the Rent Board shall report on the  
2 withdrawal or addition of rent-controlled units and current or proposed policies that affect these  
3 numbers; the Department of Building Inspection shall report on the withdrawal or addition of  
4 Residential Hotel units and current or proposed policies that affect these numbers; and the City  
5 Economist shall report on annual and projected job growth by the income categories specified in the  
6 City's General Plan Housing Element.

7 (3) All reports and presentation materials from the annual Housing Balance hearing  
8 shall be maintained by year for public access on the Planning Department's website on its page  
9 devoted to Housing Balance Monitoring and Reporting.

10  
11 Section 4. Effective Date. This ordinance shall become effective 30 days after  
12 enactment. Enactment occurs when the Mayor signs the ordinance, the Mayor returns the  
13 ordinance unsigned or does not sign the ordinance within ten days of receiving it, or the Board  
14 of Supervisors overrides the Mayor's veto of the ordinance.

15  
16 APPROVED AS TO FORM:  
17 DENNIS J. HERRERA, City Attorney

18 By:   
19 MARLENA BYRNE  
Deputy City Attorney

20 n:\egana\as2015\1500366\01006068.doc

21  
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23  
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25  
  
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City and County of San Francisco  
Tails  
Ordinance

City Hall  
1 Dr. Carlton B. Goodlett Place  
San Francisco, CA 94102-4689

File Number: 150029

Date Passed: April 21, 2015

Ordinance amending the Planning Code to require the Planning Department to monitor the balance between new market rate housing and new affordable housing, and publish a bi-annual Housing Balance Report; requiring an annual hearing at the Board of Supervisors on strategies for achieving and maintaining the required housing balance in accordance with San Francisco's housing production goals; and making environmental findings, Planning Code, Section 302, findings, and findings of consistency with the General Plan, and the eight priority policies of Planning Code, Section 101.1.

April 06, 2015 Land Use and Transportation Committee - AMENDED, AN AMENDMENT OF THE WHOLE BEARING SAME TITLE

April 06, 2015 Land Use and Transportation Committee - RECOMMENDED AS AMENDED

April 14, 2015 Board of Supervisors - PASSED, ON FIRST READING

Ayes: 11 - Avalos, Breed, Campos, Christensen, Cohen, Farrell, Kim, Mar, Tang, Wiener and Yee

April 21, 2015 Board of Supervisors - FINALLY PASSED

Ayes: 11 - Avalos, Breed, Campos, Christensen, Cohen, Farrell, Kim, Mar, Tang, Wiener and Yee

File No. 150029

I hereby certify that the foregoing Ordinance was FINALLY PASSED on 4/21/2015 by the Board of Supervisors of the City and County of San Francisco.

Angela Calvillo  
Clerk of the Board

  
Mayor

Date Approved

## APPENDIX B

### CUMULATIVE HOUSING BALANCE REPORT No. 12 TABLES BY PLANNING DISTRICTS

**Table 1A**

**Cumulative Housing Balance Calculation, 2011 Q1 – 2020 Q4**

Planning District	Net New Affordable Housing Built	Acquisitions, Rehabs & Small Sites Complete	Total Entitled & Permitted Affordable Units	Units Removed from Protected Status	Total Net New Units Built	Total Entitled & Permitted Units	Cumulative Housing Balance
Bernal Heights	2	123	9	182	66	179	-19.6%
Buena Vista	284	202	88	193	1,192	720	19.9%
Central	25	22	10	320	360	356	-36.7%
Downtown	1,193	983	794	120	4,909	4,819	29.3%
Ingleside	127	16	284	195	571	5,797	3.6%
Inner Sunset	6	-	2	176	123	116	-70.3%
Marina	16	-	18	164	410	281	-18.8%
Mission	588	318	1,040	578	2,503	4,296	20.1%
Northeast	282	235	189	304	900	881	22.6%
Outer Sunset	17	44	10	461	130	389	-75.1%
Presidio	-	-	-	-	-	1	0.0%
Richmond	98	56	23	520	390	669	-32.4%
South Bayshore	1,296	-	2,959	109	1,771	12,552	28.9%
South Central	75	-	458	447	291	1,562	4.6%
South of Market	2,500	694	2,959	121	15,479	17,926	18.1%
Treasure Island	-	-	-	-	-	-	N/A
Western Addition	582	286	67	179	1,741	1,088	26.7%
<b>Totals</b>	<b>7,091</b>	<b>2,979</b>	<b>8,910</b>	<b>4,069</b>	<b>30,836</b>	<b>51,632</b>	<b>18.1%</b>

\*Treasure Island developments permitted are included as part of Planning District 9 South of Market.

**Table 1B**  
**Expanded Cumulative Housing Balance Calculation, 2011 Q1–2020 Q4**

Planning District	Net New Affordable Housing Built	Acquisitions, Rehabs & Small Sites Completed	RAD Program and Home SF Replacement Units	Total Entitled & Permitted Affordable Units	Units Removed from Protected Status	Total Net New Units Built	Total Entitled & Permitted Units	Expanded Cumulative Housing Balance
Bernal Heights	2	123	268	9	182	66	179	89.8%
Buena Vista	284	202	132	88	193	1,192	720	26.8%
Central	25	22	107	10	320	360	356	-21.8%
Downtown	1,193	983	284	794	120	4,909	4,819	32.2%
Ingleside	127	16	-	284	195	571	5,797	3.6%
Inner Sunset	6	-	109	2	176	123	116	-24.7%
Marina	16	-	138	18	164	410	281	1.2%
Mission	588	318	91	1,040	578	2,503	4,296	21.5%
Northeast	282	235	576	189	304	900	881	54.9%
Outer Sunset	17	44	-	10	461	130	389	-75.1%
Presidio	-	-	-	-	-	-	1	0.0%
Richmond	98	56	144	23	520	390	669	-18.8%
South Bayshore	1,296	-	436	2,959	109	1,771	12,552	32.0%
South Central	75	-	-	458	447	291	1,562	4.6%
South of Market	2,500	694	276	2,959	121	15,479	17,926	18.9%
Treasure Island	-	-	-	-	-	-	-	N/A
Western Addition	582	286	919	67	179	1,741	1,088	59.2%
<b>Totals</b>	<b>7,091</b>	<b>2,979</b>	<b>3,480</b>	<b>8,910</b>	<b>4,069</b>	<b>30,836</b>	<b>51,632</b>	<b>22.3%</b>

\*Treasure Island developments permitted are included as part of Planning District 9 South of Market.

Table 2

## Projected Housing Balance (Entitled, Permitted, and Under Construction Units), 2020 Q4

Planning District	Very Low Income	Low Income	Moderate Income	TBD	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
Bernal Heights	-	-	-	9	9	179	5.0%
Buena Vista	-	-	25	63	88	720	12.2%
Central	-	-	5	5	10	356	2.8%
Downtown	-	187	70	537	794	4,819	16.5%
Ingleside	-	-	-	284	284	5,797	4.9%
Inner Sunset	-	-	-	2	2	116	1.7%
Marina	-	-	-	18	18	281	6.4%
Mission	-	575	100	365	1,040	4,296	24.2%
Northeast	-	2	-	187	189	881	21.5%
Outer Sunset	-	-	10	-	10	389	2.6%
Presidio	-	-	-	-	-	1	0.0%
Richmond	-	-	-	23	23	669	3.4%
South Bayshore	-	-	72	2,887	2,959	12,552	23.6%
South Central	-	167	7	284	458	1,562	29.3%
South of Market	60	455	131	2,313	2,959	17,926	16.5%
Treasure Island	-	-	-	-	-	-	N/A
Western Addition	-	18	28	21	67	1,088	6.2%
<b>Totals</b>	<b>60</b>	<b>1,404</b>	<b>448</b>	<b>6,998</b>	<b>8,910</b>	<b>51,632</b>	<b>17.3%</b>

\*Treasure Island developments permitted are included as part of Planning District 9 South of Market.

Table 3

## Building Permits Approved or Under Construction, 2020 Q4

Planning District	Very Low Income	Low Income	Moderate Income	TBD	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
Bernal Heights	-	-	-	-	-	63	0.0%
Buena Vista	-	-	25	63	88	356	24.7%
Central	-	-	5	-	5	159	3.1%
Downtown	-	187	70	517	774	4,152	18.6%
Ingleside	-	-	-	-	-	1,059	0.0%
Inner Sunset	-	-	-	2	2	47	4.3%
Marina	-	-	-	-	-	128	0.0%
Mission	-	562	70	363	995	3,342	29.8%
Northeast	-	2	-	182	184	409	45.0%
Outer Sunset	-	-	7	-	7	285	2.5%
Presidio	-	-	-	-	-	1	0.0%
Richmond	-	-	-	23	23	188	12.2%
South Bayshore	-	-	-	112	112	845	13.3%
South Central	-	167	7	132	306	648	47.2%
South of Market	60	272	106	430	868	4,164	20.8%
Treasure Island	-	-	-	-	-	-	N/A
Western Addition	-	18	28	8	54	928	5.8%
<b>Totals</b>	<b>60</b>	<b>1,208</b>	<b>318</b>	<b>1,832</b>	<b>3,418</b>	<b>16,774</b>	<b>20.4%</b>

\*Treasure Island developments permitted are included as part of Planning District 9 South of Market.

**Table 4**  
**Entitled Units without a Building Permit Issued, 2020 Q4**

Planning District	Very Low Income	Low Income	Moderate Income	TBD	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
Bernal Heights	-	-	-	9	9	116	7.8%
Buena Vista	-	-	-	-	-	364	0.0%
Central	-	-	-	5	5	197	2.5%
Downtown	-	-	-	20	20	667	3.0%
Ingleside	-	-	-	284	284	4,738	6.0%
Inner Sunset	-	-	-	-	-	69	0.0%
Marina	-	-	-	18	18	153	11.8%
Mission	-	13	30	2	45	954	4.7%
Northeast	-	-	-	5	5	472	1.1%
Outer Sunset	-	-	3	-	3	104	2.9%
Presidio	-	-	-	-	-	-	N/A
Richmond	-	-	-	-	-	481	0.0%
South Bayshore	-	-	72	2,775	2,847	11,707	24.3%
South Central	-	-	-	152	152	914	16.6%
South of Market	-	183	25	1,883	2,091	13,762	15.2%
Treasure Island	-	-	-	-	-	-	N/A
Western Addition	-	-	-	13	13	160	8.1%
<b>Totals</b>	<b>-</b>	<b>196</b>	<b>130</b>	<b>5,166</b>	<b>5,492</b>	<b>34,858</b>	<b>15.8%</b>

**Table 5**  
**New Housing Production by Affordability, 2011 Q1 – 2020 Q4**

Planning District	Very Low Income	Low Income	Moderate Income	Middle Income	Total Affordable Units	Net New Units	Total Affordable Units as % of Net New Units
Bernal Heights	-	-	13	-	13	66	19.7%
Buena Vista	134	85	99	-	318	1,192	26.7%
Central	-	18	53	-	71	360	19.7%
Downtown	455	508	232	-	1,195	4,909	24.3%
Ingleside	70	29	40	-	139	571	24.3%
Inner Sunset	-	-	30	-	30	123	24.4%
Marina	-	-	52	-	52	410	12.7%
Mission	169	453	93	-	715	2,503	28.6%
Northeast	178	54	74	-	306	900	34.0%
Outer Sunset	-	-	37	-	37	130	28.5%
Presidio	-	-	-	-	-	-	N/A
Richmond	69	-	79	-	148	390	37.9%
South Bayshore	862	354	86	-	1,302	1,771	73.5%
South Central	54	2	30	-	86	291	29.6%
South of Market	686	1,419	410	-	2,515	15,479	16.2%
Treasure Island	-	-	-	-	-	-	N/A
Western Addition	220	257	138	-	615	1,741	35.3%
<b>Totals</b>	<b>2,897</b>	<b>3,179</b>	<b>1,466</b>	<b>-</b>	<b>7,542</b>	<b>30,836</b>	<b>24.5%</b>

**Table 6a**  
**Acquisitions and Rehabilitation of**  
**Affordable Housing, 2011 Q1 – 2020 Q4**

Planning District	No. of Building	No. of Units
Bernal Heights	4	112
Buena Vista	4	190
Central	1	22
Downtown	14	958
Ingleside	1	16
Inner Sunset	-	-
Marina	-	-
Mission	10	254
Northeast	6	198
Outer Sunset	4	34
Presidio	-	-
Richmond	2	28
South Bayshore	-	-
South Central	-	-
South of Market	6	677
Treasure Island	-	-
Western Addition	6	259
<b>Totals</b>	<b>58</b>	<b>2,748</b>

**Table 6b**  
**Small Sites Program Acquisitions, 2014 – 2020 Q4**

Planning District	No. of Building	No. of Units
Bernal Heights	2	11
Buena Vista	2	12
Central	-	-
Downtown	3	25
Ingleside	-	-
Inner Sunset	-	-
Marina	-	-
Mission	8	64
Northeast	2	37
Outer Sunset	2	10
Presidio	-	-
Richmond	2	28
South Bayshore	-	-
South Central	-	-
South of Market	1	17
Treasure Island	-	-
Western Addition	3	27
<b>Totals</b>	<b>25</b>	<b>231</b>



**Table 7**  
**RAD Affordable Units, 2015-2020 Q4**

Planning District ▼	No. of Building ▼	No. of Units ▼
<b>Bernal Heights</b>	2	268
<b>Buena Vista</b>	2	132
<b>Central</b>	1	107
<b>Downtown</b>	3	284
<b>Ingleside</b>	-	-
<b>Inner Sunset</b>	1	109
<b>Marina</b>	2	138
<b>Mission</b>	1	91
<b>Northeast</b>	4	576
<b>Outer Sunset</b>	-	-
<b>Presidio</b>	-	-
<b>Richmond</b>	2	144
<b>South Bayshore</b>	2	436
<b>South Central</b>	-	-
<b>South of Market</b>	1	276
<b>Treasure Island</b>	-	-
<b>Western Addition</b>	7	919
<b>Totals</b>	<b>28</b>	<b>3,480</b>

**Table 8**  
**Units Removed from Protected Status, 2011 Q1 – 2020 Q4**

Planning District	Condo Conversion	Demolition	Ellis Act	Owner Move-In	Units Removed from Protected Status
<b>Bernal Heights</b>	6	18	56	102	182
<b>Buena Vista</b>	5	3	72	113	193
<b>Central</b>	24	14	83	199	320
<b>Downtown</b>	-	68	48	4	120
<b>Ingleside</b>	-	35	31	129	195
<b>Inner Sunset</b>	5	12	61	98	176
<b>Marina</b>	11	4	35	114	164
<b>Mission</b>	4	30	293	251	578
<b>Northeast</b>	11	8	157	128	304
<b>Outer Sunset</b>	-	69	81	311	461
<b>Presidio</b>	-	-	-	-	-
<b>Richmond</b>	5	24	149	342	520
<b>South Bayshore</b>	-	11	14	84	109
<b>South Central</b>	-	53	65	329	447
<b>South of Market</b>	2	18	36	65	121
<b>Treasure Island</b>	-	-	-	-	-
<b>Western Addition</b>	7	7	33	132	179
<b>Totals</b>	<b>80</b>	<b>374</b>	<b>1,214</b>	<b>2,401</b>	<b>4,069</b>