UPDATE ON MONITORING REPORTS & 2019 HOUSING INVENTORY

Data & Analytics Group

San Francisco Planning

Presentation to the Planning Commission

July 16, 2020

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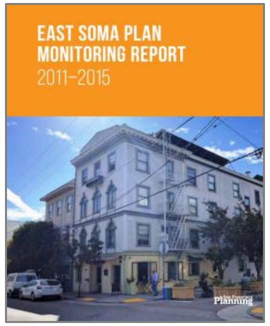
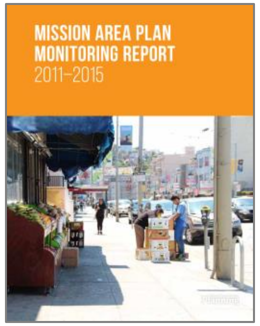
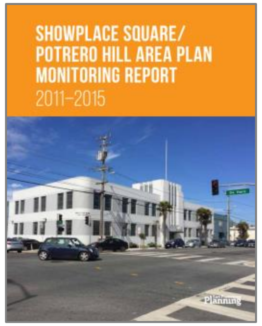
Land Use & Community Plans

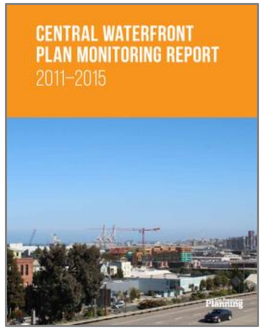
Completed	On Time		Target Completion	
• Housing Balance Report	• Q2 2020 Pipeline	Q3-20	• Q1 2020 Pipeline	07/20
• Housing Inventory	• Q3 2020 Pipeline	Q4-20	• Jobs-Housing Fit	Q3-20
	• Q4 2020 Pipeline	Q1-21	• Market & Octavia	Q3-20
			• Downtown	Q4-20
			• Commerce & Industry	Q1-21
			• Housing Balance Report, Fall 2020	Q1-21

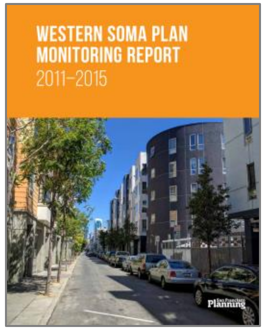
Area Plan Monitoring

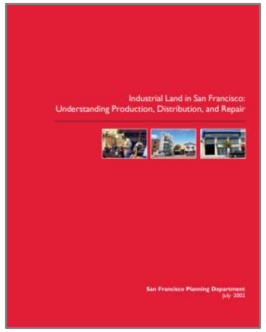


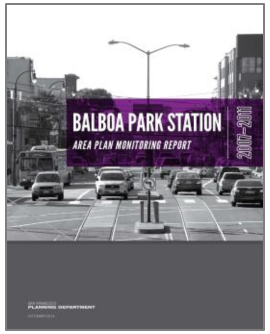


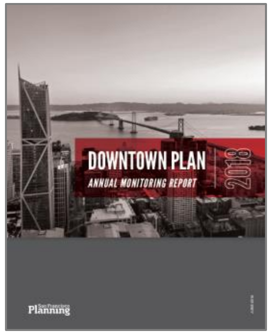




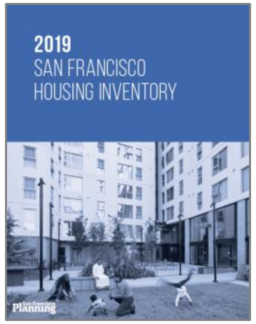




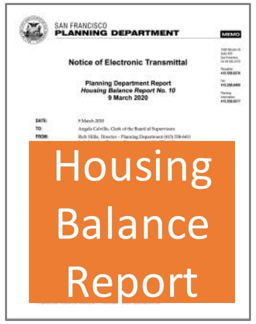


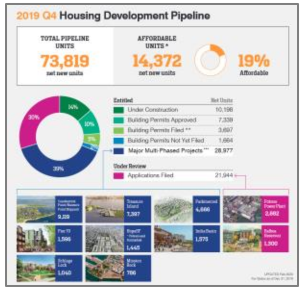


Housing Production

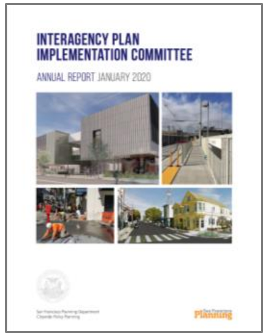


Jobs-Housing Fit Report





Economy & Impact Fees



Policy Initiatives

- Housing Affordability & Recovery Strategies
- Housing Element Update
- COVID-19 Response & Recovery
- Racial & Social Equity Initiative
- General Plan Elements Updates
- Prop E Office Allocation Cap
- Others…

2019 SAN FRANCISCO HOUSING INVENTORY

San Francisco Planning

ABOUT

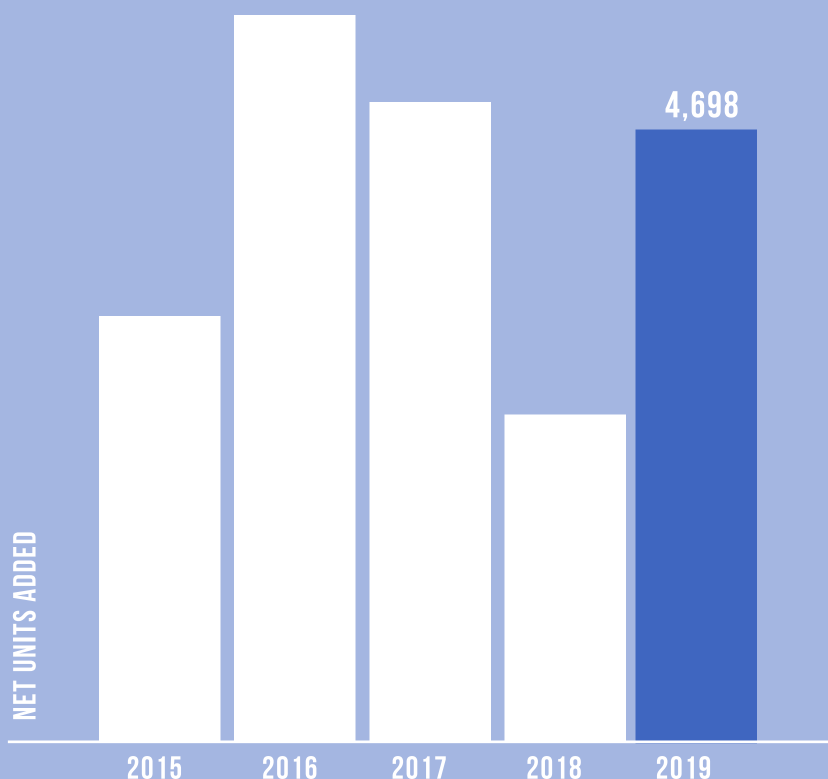
The Housing Inventory Report has been produced annually since 1967 - this year is the 50th edition.

The Report covers a range of information including: changes to San Francisco's housing stock, such as new construction,demolitions, alterations; progress with RHNA; annual net gain in housing units; and, affordable housing.

2019 SAN FRANCISCO HOUSING INVENTORY

TRENDS IN CURRENT HOUSING PRODUCTION

2019 HIGHLIGHTS—HOUSING PRODUCTION



HOUSING STOCK

CHANGE FROM 2018

399,313 ▲ 1.2%

NEW UNITS

CHANGE FROM 2018

4,858 ▲ 85%

UNITS LOST

CHANGE FROM 2018

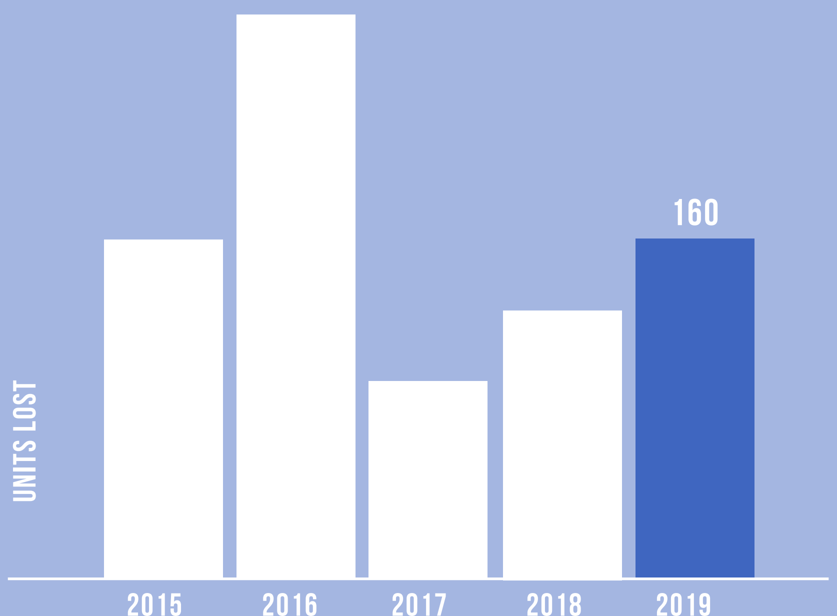
160 ▲ 44%

NET UNITS ADDED

CHANGE FROM 2018

4,698 ▲ 82%

2019 HIGHLIGHTS—UNITS LOST THROUGH ALTERATIONS AND DEMOLITIONS



DEMOLISHED UNITS

139

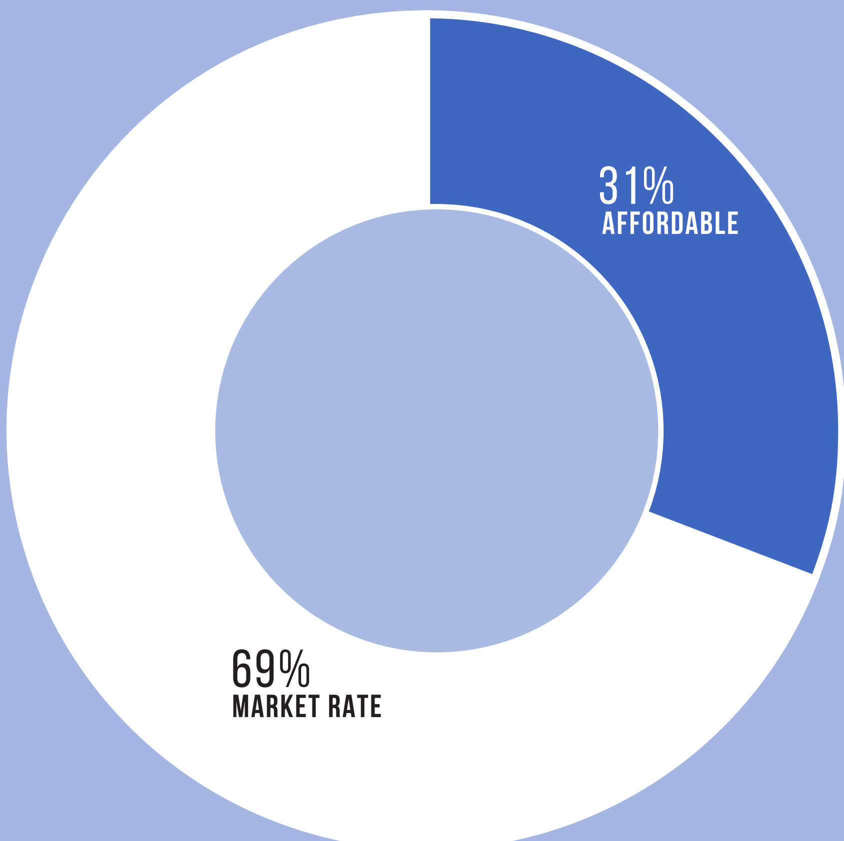
NON-CONFORMING OR ILLEGAL UNITS REMOVED

18

UNITS LOST VIA MERGERS

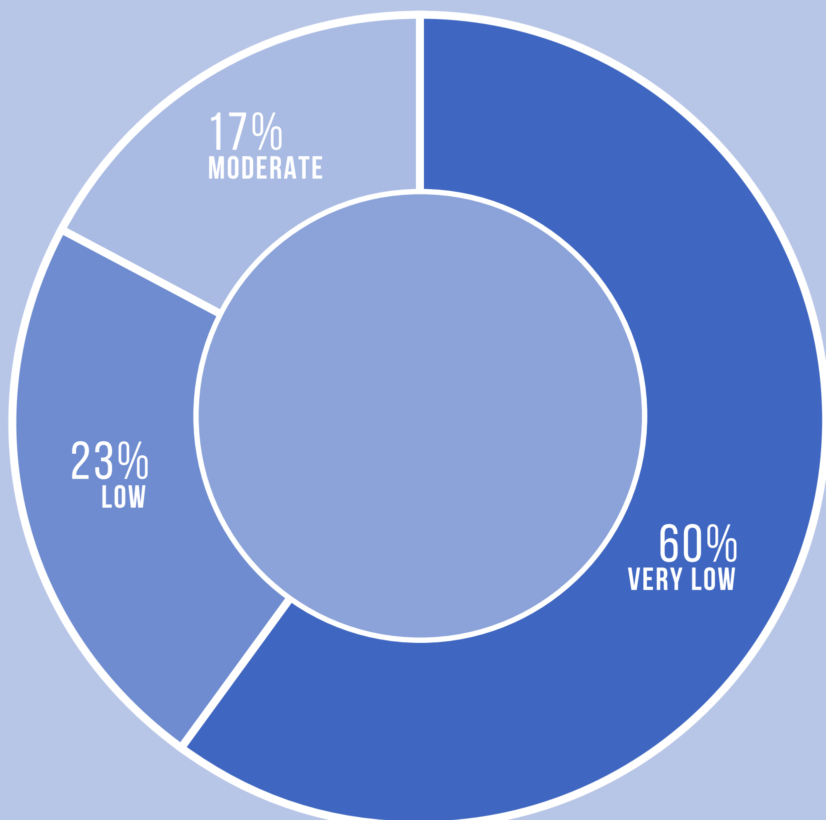
3

2019 HIGHLIGHTS— AFFORDABLE HOUSING PRODUCTION



NEW AFFORDABLE UNITS	CHANGE FROM 2018
1,456	▲126%
INCLUSIONARY UNITS	CHANGE FROM 2018
405	▲148%
SECONDARY UNITS/ADUS	CHANGE FROM 2018
177	▲26%

2019 HIGHLIGHTS— AFFORDABLE HOUSING BY INCOME LEVEL



EXTREMELY LOW INCOME (<30% AMI)

0

VERY LOW INCOME (30-50% AMI)

880 60%

LOW INCOME (50-80% AMI)

335 23%

MODERATE INCOME (80-120% AMI)

241* 17%

* 177 UNITS ARE CONSIDERED "SECONDARY UNITS" OR ACCESSORY DWELLING UNITS (ADUS) AND ARE NOT INCOME-RESTRICTED

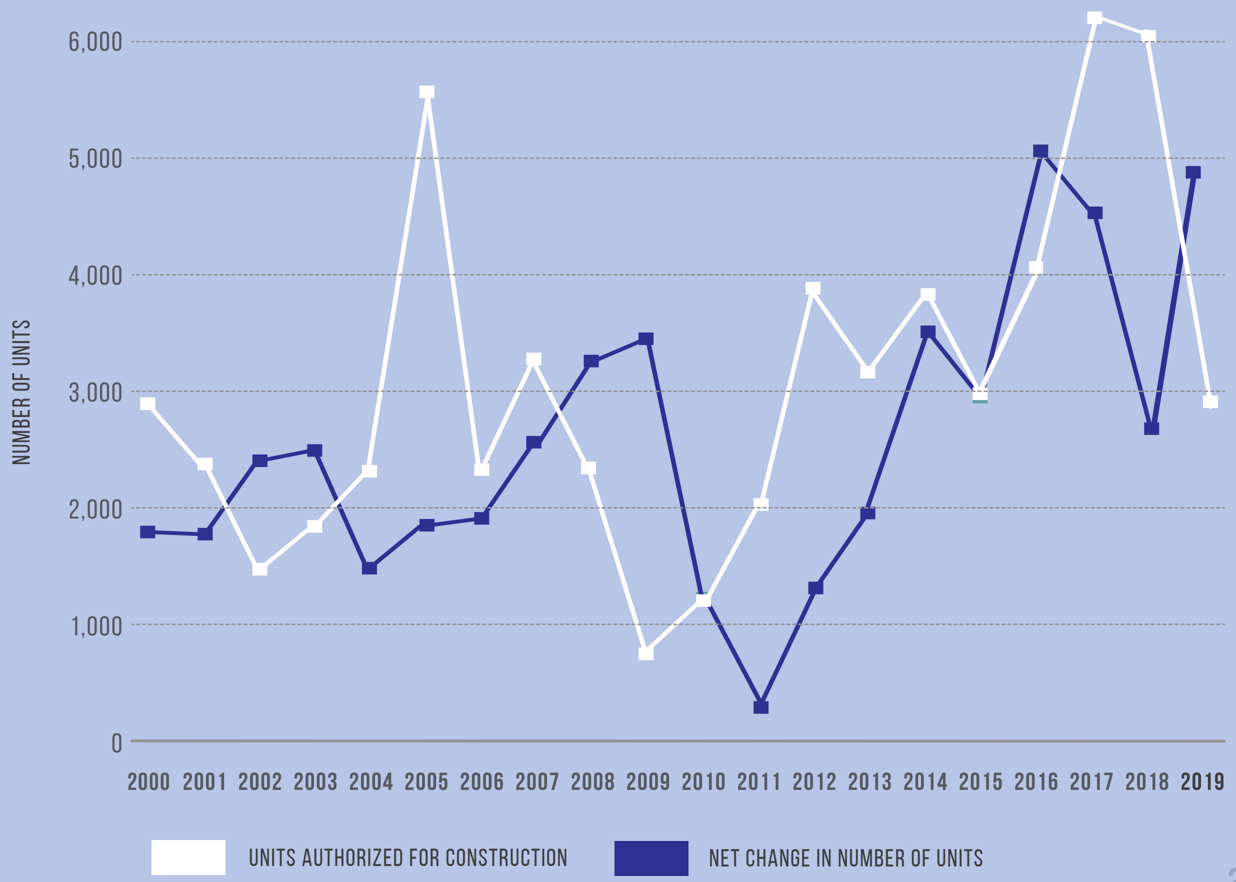
TRENDS IN PLANNED HOUSING PRODUCTION

2019 HIGHLIGHTS—AUTHORIZED UNITS

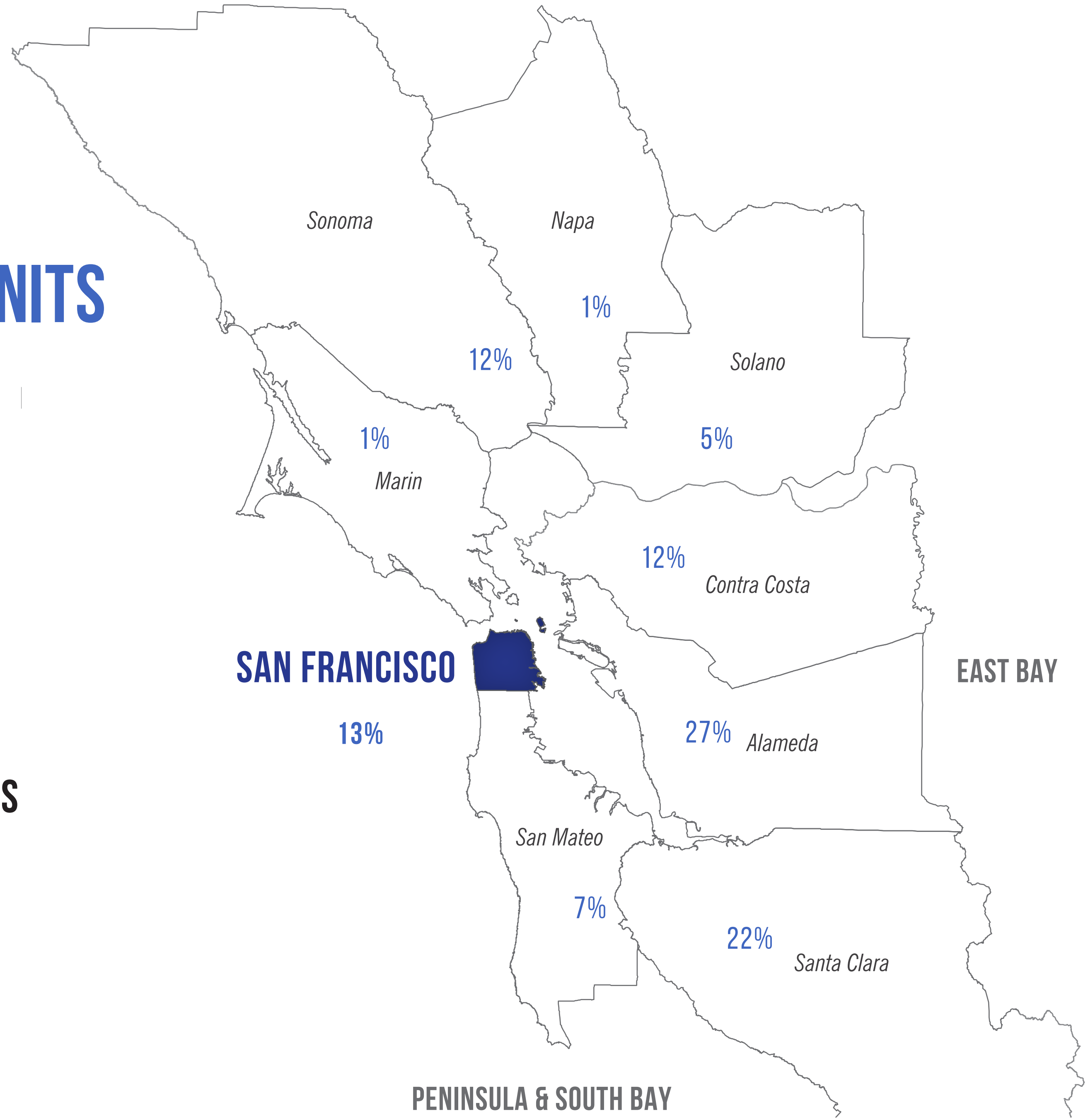
UNITS AUTHORIZED FOR CONSTRUCTION

2,944 ▼52%

20-YEAR UNIT AUTHORIZATION TRENDS, 2000–2019



2019 HIGHLIGHTS— AUTHORIZED UNITS BY SHARE OF REGION'S PRODUCTION



TOTAL AUTHORIZED UNITS

22,736

HOUSING BALANCE REPORT NO. 10

HOUSING BALANCE REPORT NO. 10

CUMULATIVE HOUSING BALANCE

21.5%

EXPANDED CUMULATIVE HOUSING BALANCE

28.6%

CHANGE FROM REPORT NO. 9

INCREASED FROM 27.4% FOR 2009Q2-2019Q2
FOR EXPANDED CUMULATIVE HOUSING BALANCE

RHNA ANNUAL PROGRESS REPORT

REGIONAL HOUSING NEEDS ALLOCATION

2019 TOTAL & PERCENTAGE OF RHNA GOALS MET

3,297 UNITS

65%

*

PERMITTED UNITS ISSUED BY AFFORDABILITY										
INCOME LEVEL		RHNA BY INCOME LEVEL	2015	2016	2017	2018	2019	TOTAL UNITS TO DATE (ALL YEARS)	% PROGRESS BY INCOME LEVEL	TOTAL REMAINING RHNA BY INCOME LEVEL
VERY LOW	DEED RESTRICTED	6,234	429	410	468	0	641	1,948	31%	4,286
	NON-DEED RESTRICTED									
LOW	DEED RESTRICTED	4,639	179	353	427	922	491	2,372	51%	2,267
	NON-DEED RESTRICTED									
MOD	DEED RESTRICTED	5,460	83	183	105	88	89	1,800	33%	3,660
	NON-DEED RESTRICTED		30	30	150	404	505			
ABOVE MOD		12,536	2,874	3,604	4,641	4,683	1,571	17,373	100%*	0
TOTAL RHNA		28,869								
TOTAL UNITS			3,595	4,700	5,804	6,097	3,297	23,493		10,213

* THE NUMBER OF ABOVE-MODERATE UNITS WITH BUILDING PERMITS ISSUED OR APPROVED EXCEEDS THE CURRENT RHNA GOAL FOR THIS INCOME LEVEL, THUS WE HAVE MET 100% OF THE RHNA ALLOCATION FOR ABOVE-MODERATE INCOME UNITS.

QUARTERLY RESIDENTIAL PIPELINE

2019 Q4 Housing Development Pipeline

TOTAL PIPELINE UNITS

73,819

net new units

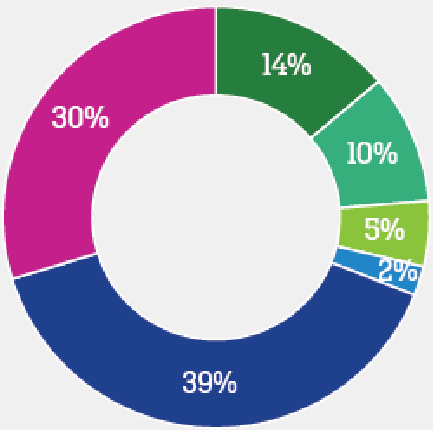
AFFORDABLE UNITS *

14,372

net new units

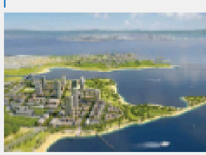
19%

Affordable



Entitled	Net Units
Under Construction	10,198
Building Permits Approved	7,339
Building Permits Filed **	3,697
Building Permits Not Yet Filed	1,664
Major Multi-Phased Projects ***	28,977

Under Review	
Applications Filed	21,944



Candlestick Point/Hunter's Point Shipyard

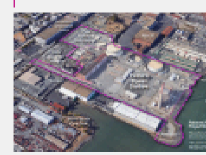
9,119

Treasure Island

7,397

Parkmerced

4,666

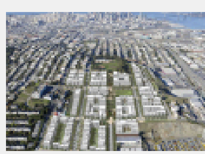


Potrero Power Plant

2,682

Pier 70

1,596



HopeSF – Potrero and Sunnydale

1,445

India Basin

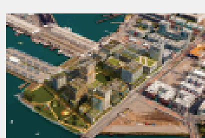
1,575

Balboa Reservoir

1,300

Schlage Lock

1,040



Mission Rock

786

UPDATED Feb 2020
For Status as of Dec 31, 2019

REPORT AND DATA AVAILABLE

PLANNING DEPARTMENT WEBSITE

SFPLANNING.ORG

DATA SF

DATASF.ORG

THANK YOU.

COMMENTS AND QUESTIONS?

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