

San Francisco
Planning

**Presentation to the
Planning Commission**

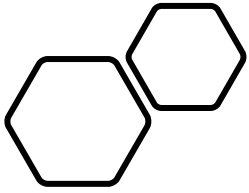
April 22, 2021

Michelle Littlefield
Data & Analytics Manager
SF Planning Department

Oscar Hernandez-Gomez
Planner/Senior Data Analyst
SF Planning Department

2020 HOUSING REPORTS

Data & Analytics Team



Overview

- **Staffing Update**
- **Upcoming Reports**
- **Focus of 2020 Reports**

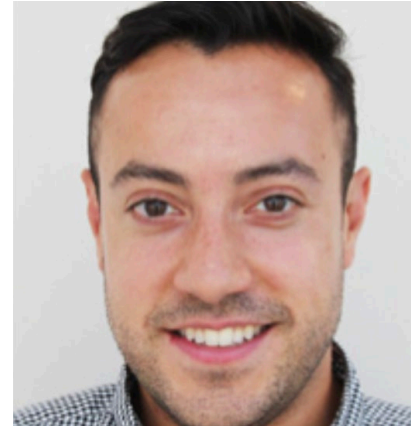
Data & Analytics Team



Michelle Littlefield
Data & Analytics Manager



John Boldrick
Senior Administrative Analyst



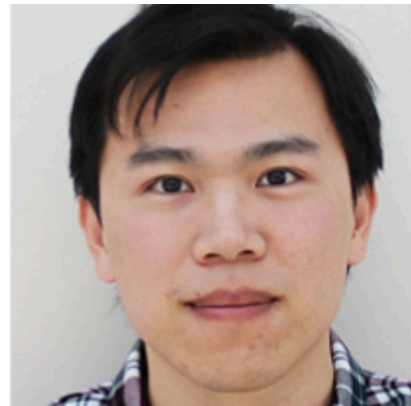
Oscar Hernandez-Gomez
Planner/Sr Data Analyst



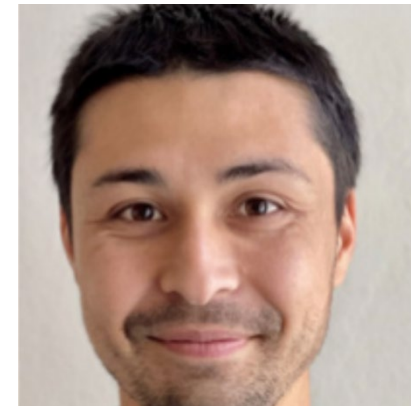
Scott Edmondson
Senior Planner



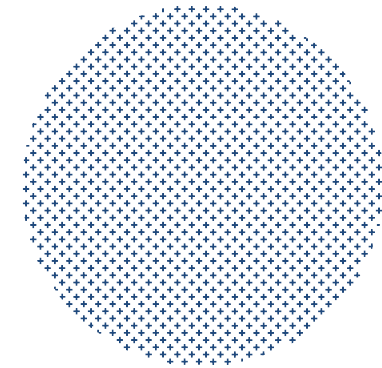
Mike Webster
GIS Cartographer



Ken Qi
Planner/GIS Data Analyst



Jason Sherba
GIS Data Analyst/Data Engineer



Vacant
Senior Data Engineer

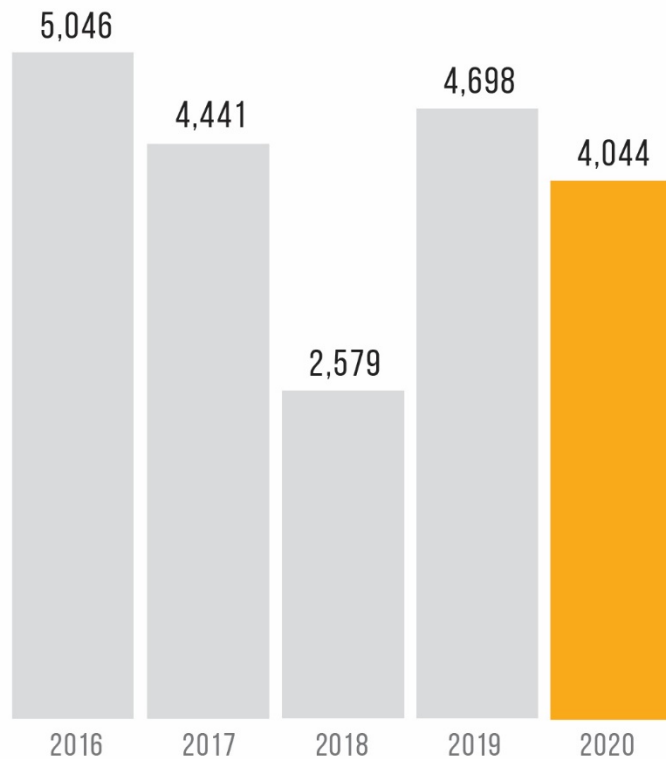
Today's Housing Reports Presentation

- 2020 Housing Inventory
- 20-21 Housing Balance Report, x2
- RHNA Annual Progress

Target Completion

- | | |
|------------------------------|-------|
| • Quarterly Pipeline | Q2-21 |
| • Jobs-Housing Fit | Q3-21 |
| • Downtown Monitoring Report | Q3-21 |
| • Commerce & Industry | Q3-21 |

2020 HIGHLIGHTS— HOUSING PRODUCTION



NET UNITS ADDED, 2016-2020

HOUSING STOCK

CHANGE FROM 2019 (399,313)

403,357

▲ 1.0%

NEW UNITS (GROSS)

CHANGE FROM 2019 (4,858)

4,402

▼ 9%

UNITS LOST

CHANGE FROM 2019 (160)

358

▲ 124%

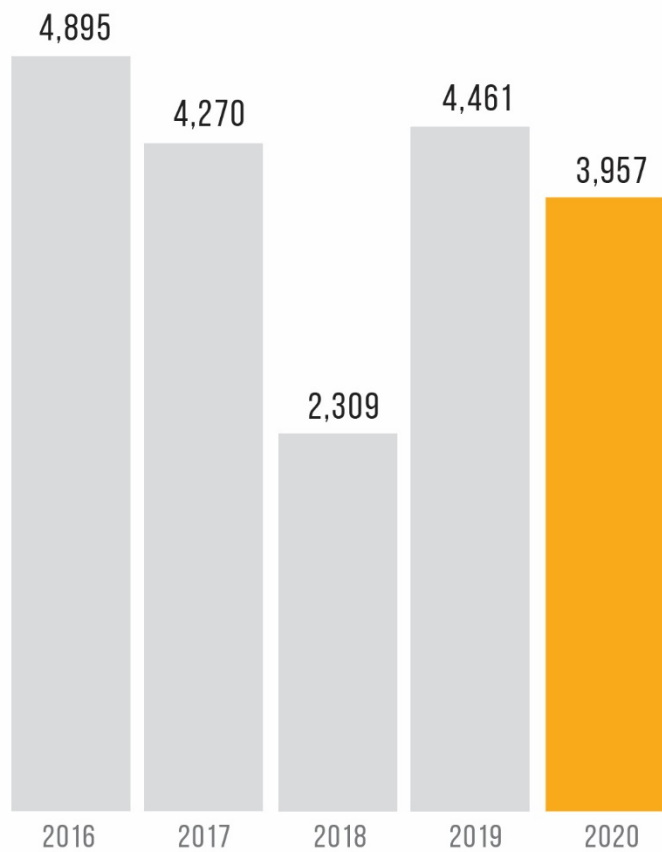
NET UNITS ADDED

CHANGE FROM 2019 (4,698)

4,044

▼ 14%

2020 HIGHLIGHTS— HOUSING PRODUCTION



GROSS UNITS COMPLETED FROM NEW CONSTRUCTION, 2016-2020

GROSS UNITS FROM NEW CONSTRUCTION

CHANGE FROM 2019 (4,461)

3,957

▼ 11%

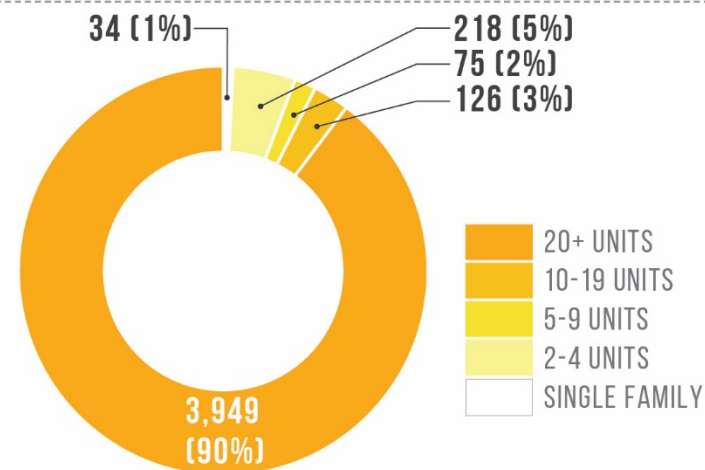
GROSS UNITS ADDED THROUGH ALTERATIONS

CHANGE FROM 2019 (397)

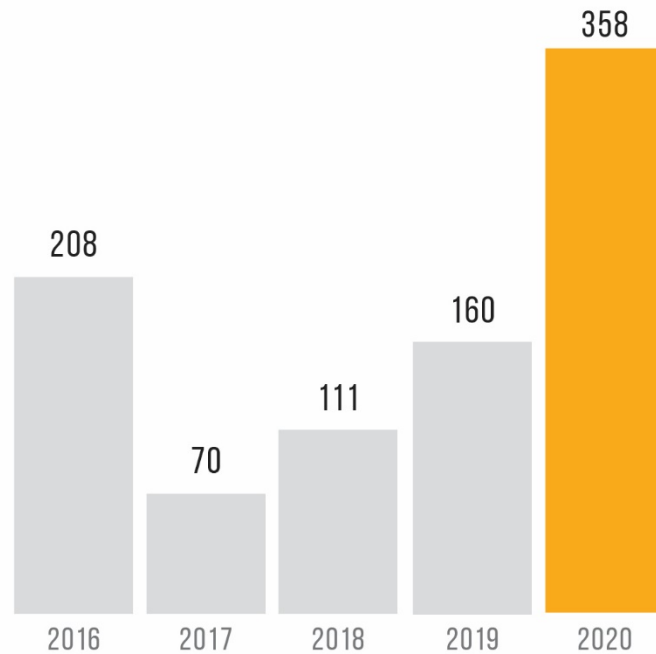
445

▲ 17%

GROSS UNIT TYPE DISTRIBUTION



2020 HIGHLIGHTS— UNITS LOST THROUGH ALTERATIONS AND DEMOLITIONS



GROSS UNITS LOST, 2016-2020

DEMOLISHED UNITS

CHANGE FROM 2019 (139)

352

▲ 153%

UNITS LOST VIA MERGERS

CHANGE FROM
2019 (3)

5

▲ 67%

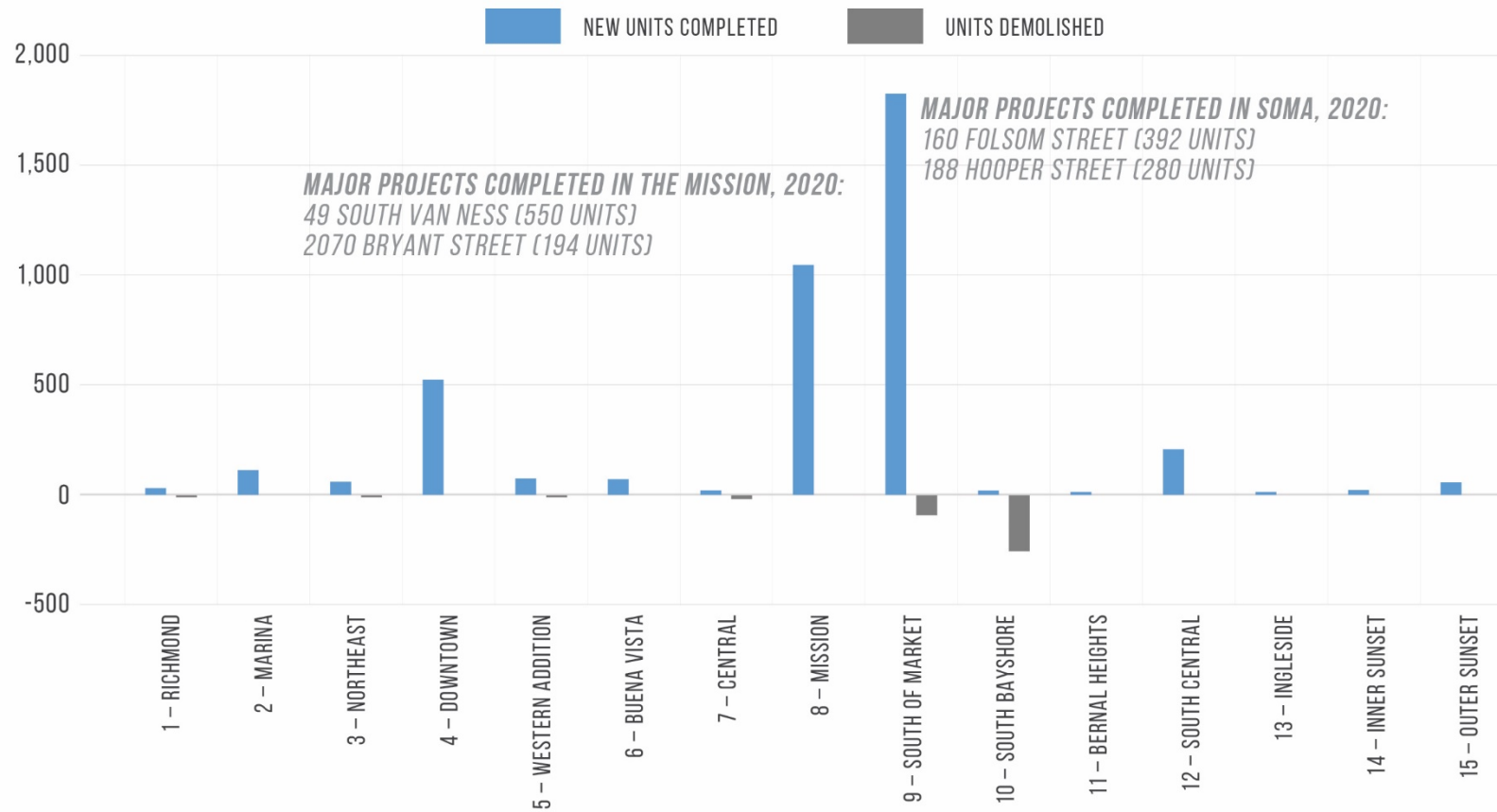
UNITS CONVERTED

CHANGE FROM
2019 (0)

1

▲ 100%

UNITS COMPLETED AND DEMOLISHED BY PLANNING DISTRICT, 2020



2020 HIGHLIGHTS— AUTHORIZED UNITS BY SHARE OF REGION'S PRODUCTION

UNITS AUTHORIZED

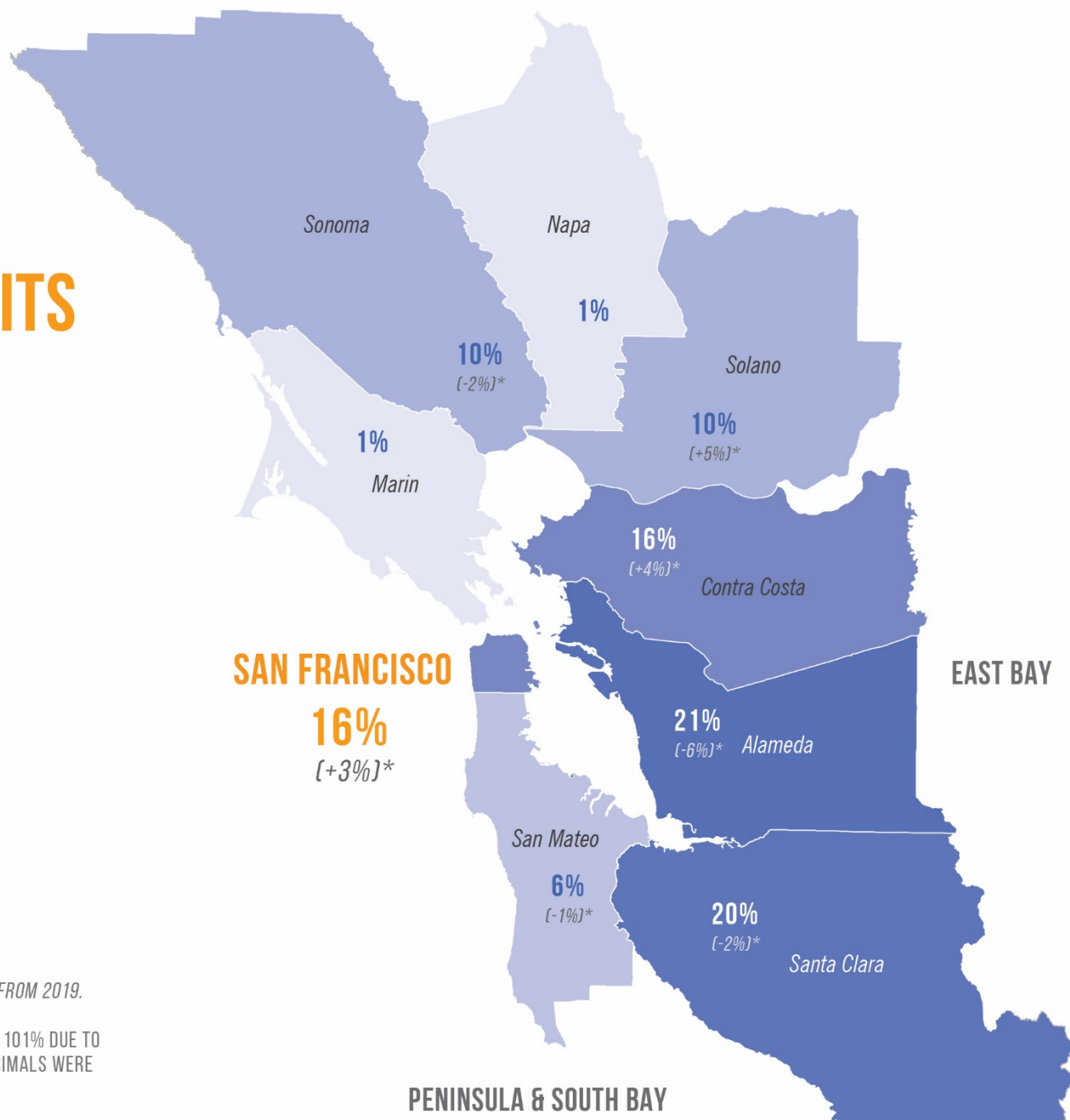
2020: 17,696 UNITS

2019: 22,736 UNITS

% CHANGE: 22% DECREASE

* REPRESENTS THE CHANGE IN PERCENTAGE SHARE FROM 2019.

NOTE: THE PERCENTAGES ON THIS MAP ADD UP TO 101% DUE TO ROUNDING AT THE INDIVIDUAL COUNTY LEVEL. DECIMALS WERE ROUNDED TO THE NEAREST INTEGER FOR CLARITY.



PENINSULA & SOUTH BAY

2020 HIGHLIGHTS— UNITS PROCESSED

UNITS FILED

CHANGE FROM 2019 (3,924)

3,453 UNITS

▼ 12%

UNITS ENTITLED

CHANGE FROM 2019 (2,895)

7,332 UNITS

▲ 153%

UNITS AUTHORIZED

CHANGE FROM 2019 (2,944)

2,767 UNITS

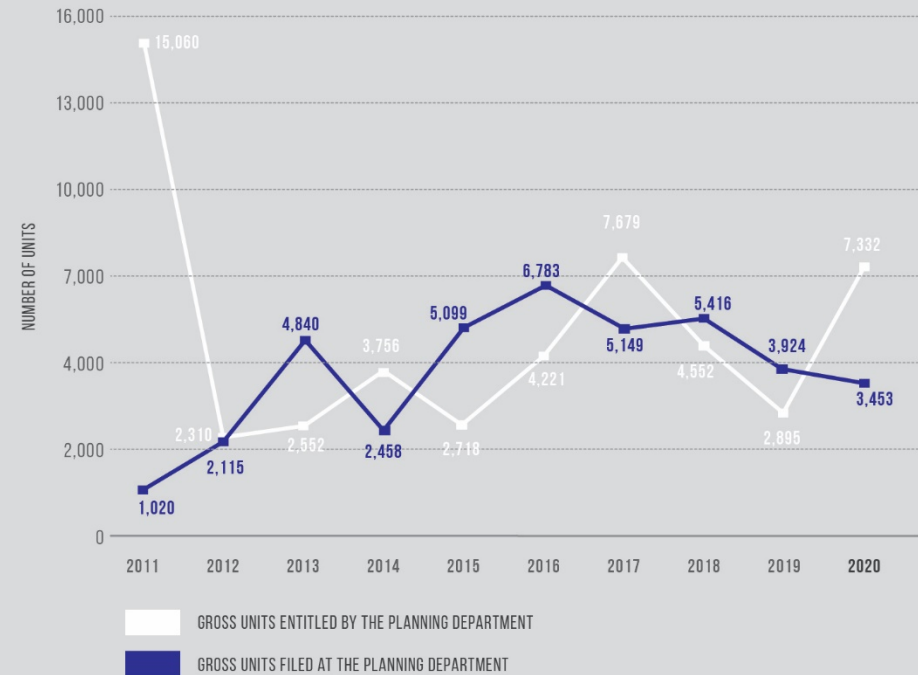
▼ 6%

NET UNITS COMPLETED

CHANGE FROM 2019 (4,698)

4,044 UNITS

▼ 14%



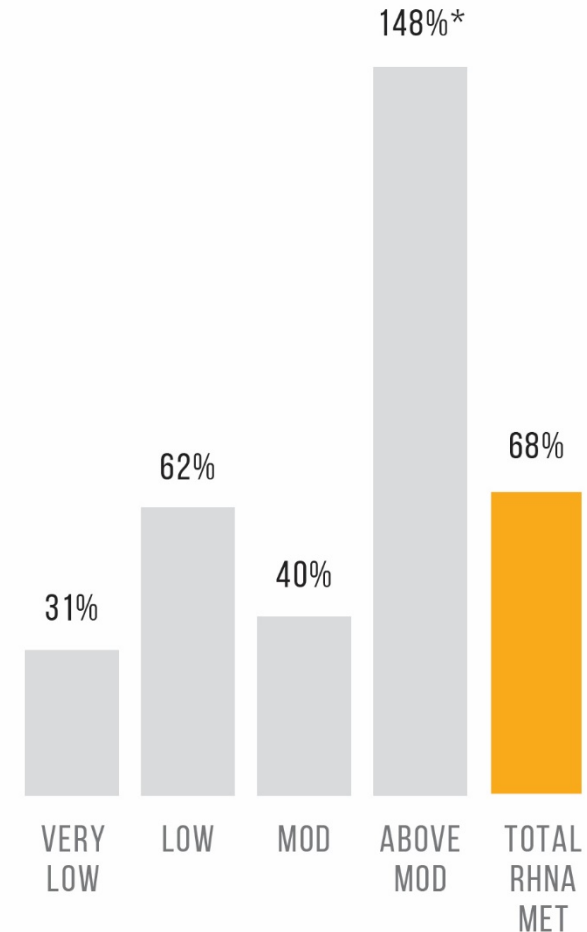
2020 REGIONAL HOUSING NEEDS ALLOCATION

TOTAL & PERCENTAGE OF RHNA GOALS MET AS OF 2020

25,651

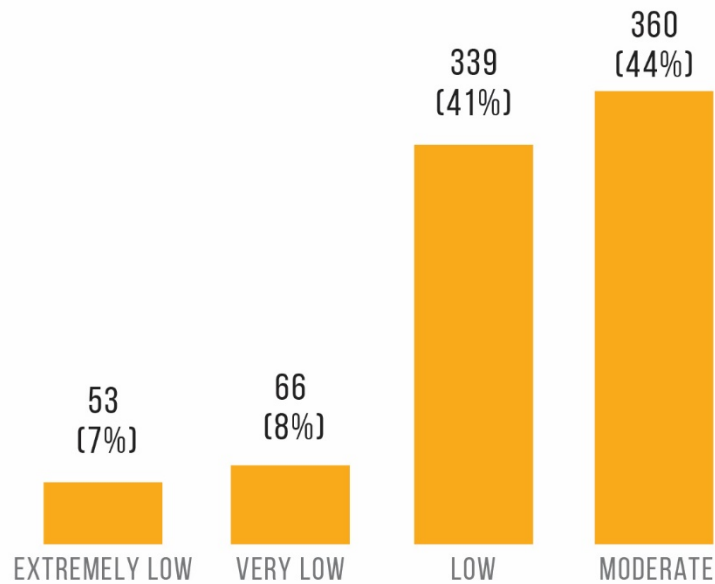
68%

PERMITTED UNITS ISSUED BY AFFORDABILITY										
INCOME LEVEL		2015	2016	2017	2018	2019	2020	TOTAL UNITS PERMITTED AS OF 2020	RHNA ALLOCATION (RHNA TARGET)	TOTAL REMAINING RHNA
VERY LOW	DEED RESTRICTED	429	410	468		654	0	1,961	6,234	4,273
	NON-DEED RESTRICTED									
LOW	DEED RESTRICTED	179	353	427	922	478	522	2,881	4,639	1,758
	NON-DEED RESTRICTED									
MODERATE	DEED RESTRICTED						176	2,211	5,460	3,249
	NON-DEED RESTRICTED	113	333	268	492	598	231			
ABOVE MODERATE		2,874	3,604	4,641	4,683	1,567	1,229	18,598*	12,536	0
TOTAL UNITS		3,595	4,700	5,804	6,097	3,297	2,158	25,651*	28,869	9,280*



* PER STATE LAW, UNITS CAN WILL COUNT TOWARD THE RHNA ALLOCATION UP TO THE TARGET AMOUNT OUTLINED FOR EACH INCOME LEVEL. UNITS EXCEEDING RHNA TARGETS IN ANY CATEGORY DO NOT COUNT TOWARD THE OVERALL RHNA HOUSING GOALS AND CANNOT FULFILL THE RHNA ALLOCATION IN ANOTHER INCOME LEVEL.

2020 HIGHLIGHTS— NET AFFORDABLE HOUSING CONSTRUCTION BY INCOME LEVEL



NET AFFORDABLE UNITS BY INCOME LEVEL

**EXTREMELY LOW
INCOME (≤30% AMI)**

CHANGE FROM
2019 (0)

53

▲ 100%

**VERY LOW INCOME
(31-50% AMI)**

CHANGE FROM
2019 (880)

66

▼ 93%

**LOW INCOME
(51-80% AMI)**

CHANGE FROM
2019 (335)

339

▲ 1%

**MODERATE INCOME
(81-120% AMI)**

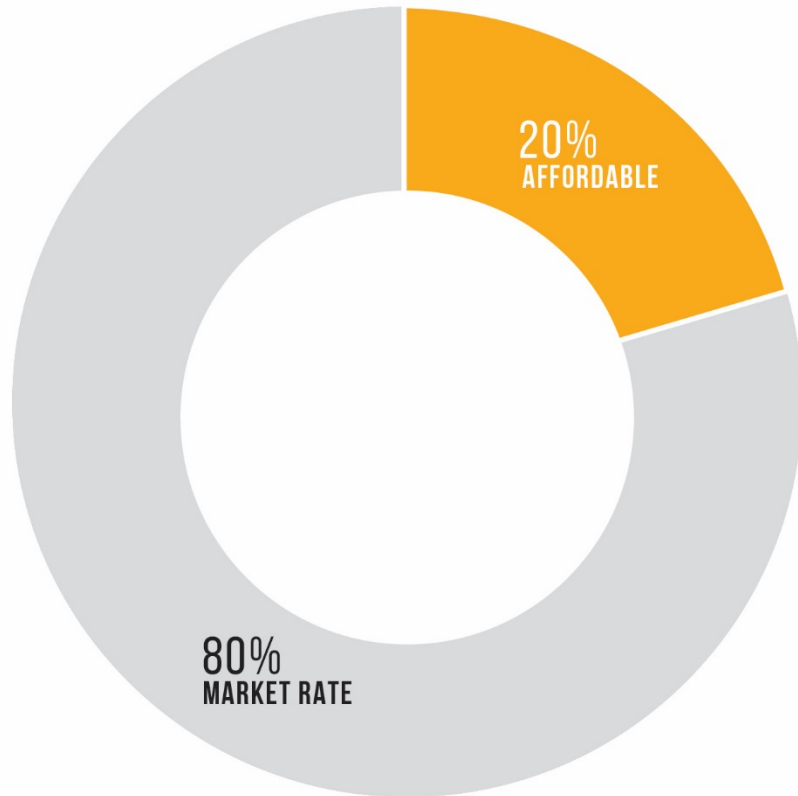
CHANGE FROM
2019 (241)

360*

▲ 49%

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

2020 HIGHLIGHTS— MARKET RATE & AFFORDABLE HOUSING



NEW MARKET RATE UNITS

CHANGE FROM
2019 (3,402)

3,226

▼5%

NEW AFFORDABLE UNITS

CHANGE FROM 2019 (1,456)

818

▼44%

INCLUSIONARY UNITS

CHANGE FROM 2019 (405)

480

▲19%

100% AFFORDABLE UNITS

CHANGE FROM 2019 (874)

208

▼76%

AFFORDABLE SECONDARY UNITS/ADUS

CHANGE FROM
2019 (177)

130

▲27%

2020 HIGHLIGHTS— ACCESSORY DWELLING UNITS

ADUs COMPLETED CHANGE FROM 2019 (177)

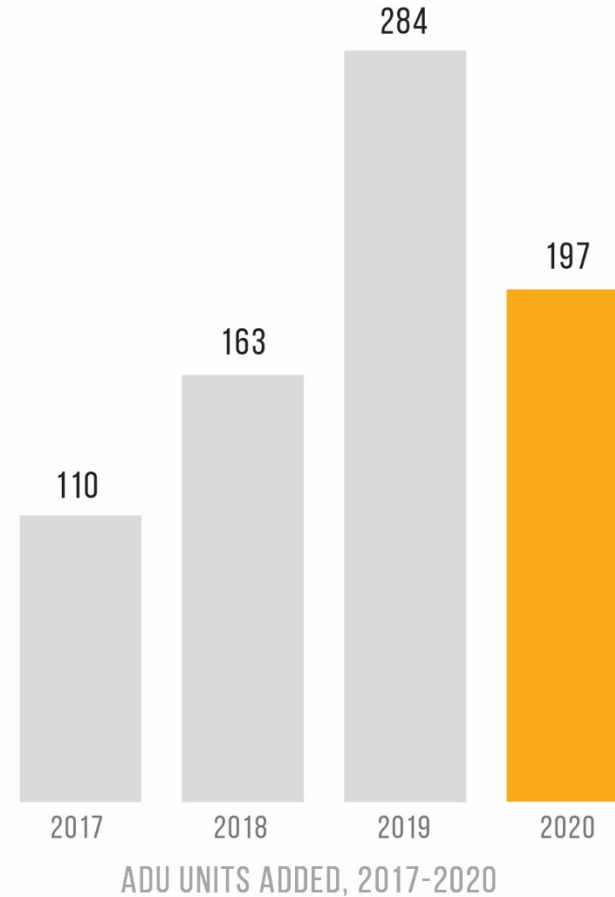
133 UNITS ▼ 25%

ADUs LEGALIZED CHANGE FROM 2019 (107)

64 UNITS ▼ 40%

TOTAL ADUs ADDED CHANGE FROM 2019 (284)

197 UNITS ▼ 31%



2020 HIGHLIGHTS— DENSITY BONUS

DENSITY BONUS
PROJECTS IN PIPELINE

CHANGE FROM 2019 (70)

77 PROJECTS

▲ 10%

UNITS PROPOSED
BEFORE BONUS

CHANGE FROM 2019 (5,550)

5,878 UNITS

▲ 6%

UNITS PROPOSED
AFTER BONUS

CHANGE FROM 2019 (698)

7,497 UNITS

▲ 12%

NET UNITS ADDED
THRU BONUS

CHANGE FROM 2019 (1,249)

1,619 UNITS

▲ 30%

2020 Housing Inventory

HOUSING BALANCE REPORT NOs. 10, 11, 12

EXPANDED CUMULATIVE HOUSING BALANCE	=	[NET NEW AFFORDABLE HOUSING + COMPLETED ACQUISITIONS & REHABS + COMPLETED HOPE SF + RAD PUBLIC HOUSING REPLACEMENT + ENTITLED & PERMITTED AFFORDABLE UNITS] - [UNITS REMOVED FROM PROTECTED STATUS]
		[NET NEW HOUSING BUILT + NET ENTITLED & PERMITTED UNITS]

	NO. 10	NO. 11	NO. 12
CUMULATIVE HOUSING BALANCE	21.5%	22.2%	18.1%
EXPANDED CUMULATIVE HOUSING BALANCE	28.6%	26.6%	22.3%
PROJECTED HOUSING BALANCE	22.7%	20.0%	17.3%

**REPORT AND DATA
AVAILABLE**

PLANNING DEPARTMENT WEBSITE

SFPLANNING.ORG

DATA SF

DATASF.ORG

**THANK
YOU.**

COMMENTS AND QUESTIONS?

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