Jobs-Housing Capacity & Growth

Overview of Data and Policy Considerations

San Francisco Planning

Planning Commission Informational | October 5, 2017

Highlights of Past Presentations

- April 28, 2016: Job + Office Trends
  - SF jobs grew slower than Bay Area and US until mid-2000s, then faster
  - SF annual job growth 1985-2015: +4,000; 1995-2015: +7,500; 2005-2015: +13,000
  - SF and a few peer cities saw substantial average wage spikes between 1990-2000
  - Class B + C office space have seen greatest rent increases; no more “affordable” office-submarkets in SF
- March 2, 2017: Jobs + Housing Trends
  - Increasing housing demand from increasing high-income households without commensurate housing production has resulted in major pressure on existing housing stock
  - Percent of in-commute/out-commute have remained pretty steady, but have grown in actual numbers as city has grown
  - Rest of region has produced way more jobs:housing than historic patterns
  - SF jobs/housing ratio has remained relatively unchanged since 1980 at about 1.75:1
  - Plan Bay Area housing+job allocation would result in SF at 1.66:1 in 2040
  - Jobs-housing balance is a regional question primarily

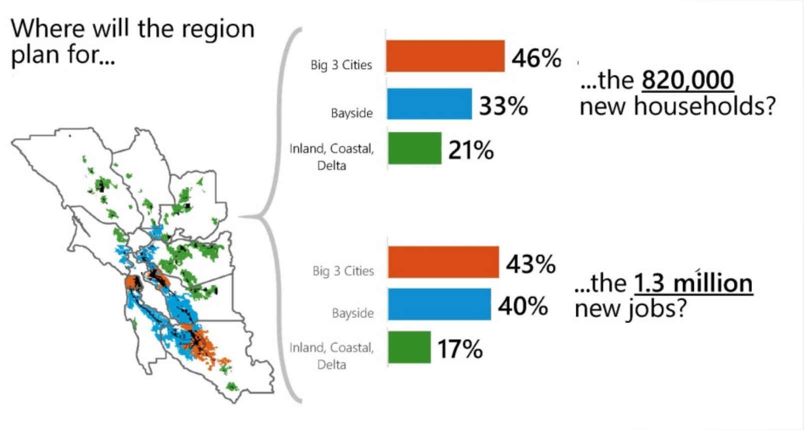
Jobs will continue to grow in the Bay Area

Plan Bay Area projects regional job growth of 700,000 jobs from 2015-2040

Plan Bay Area 2040

Not the torrid pace of past 5 years, but modest steady growth

Whether SF zones for this space or not, the jobs will go… somewhere



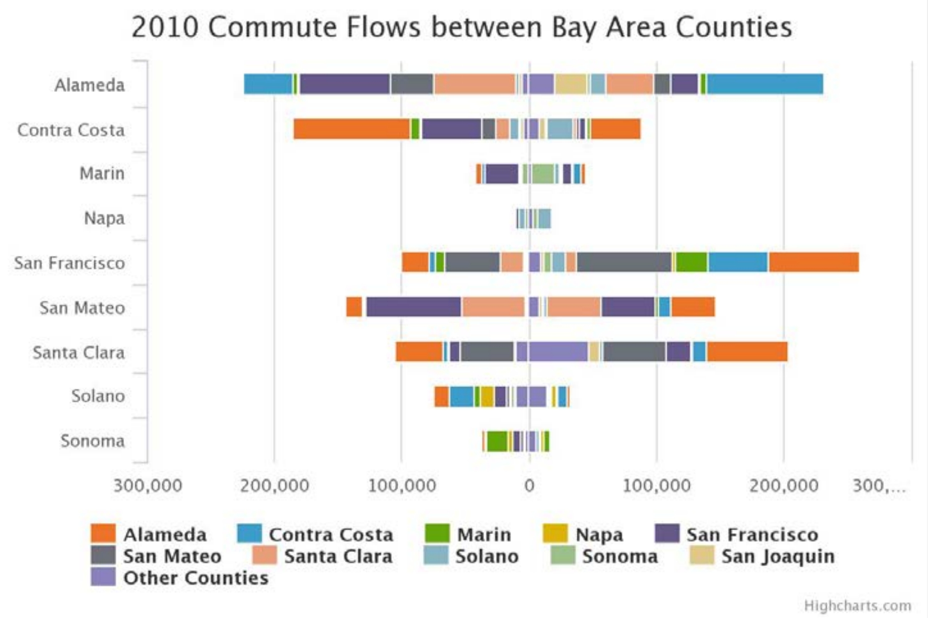
City-centered jobs are transit-accessible, and therefore accessible to a greater range of workers, regardless of income or car status. They are denser, greener, cleaner and more energy efficient than jobs located outside of the urban core.

Jobs Need to be Near Regional Transit

- GHG performance heavily influenced by commute travel
- Workplace location relative to transit is huge influence over travel behavior and very sensitive to distance (moreso than proximity of home to transit)
  - "Last mile" practical and psychological challenges
  - Inevitable need to trip-chain on *home* end of commute transit trip that are less practical/desirable on *work* end (eg daycare/school, errands/shopping)

Jobs Need to be Near Regional Transit

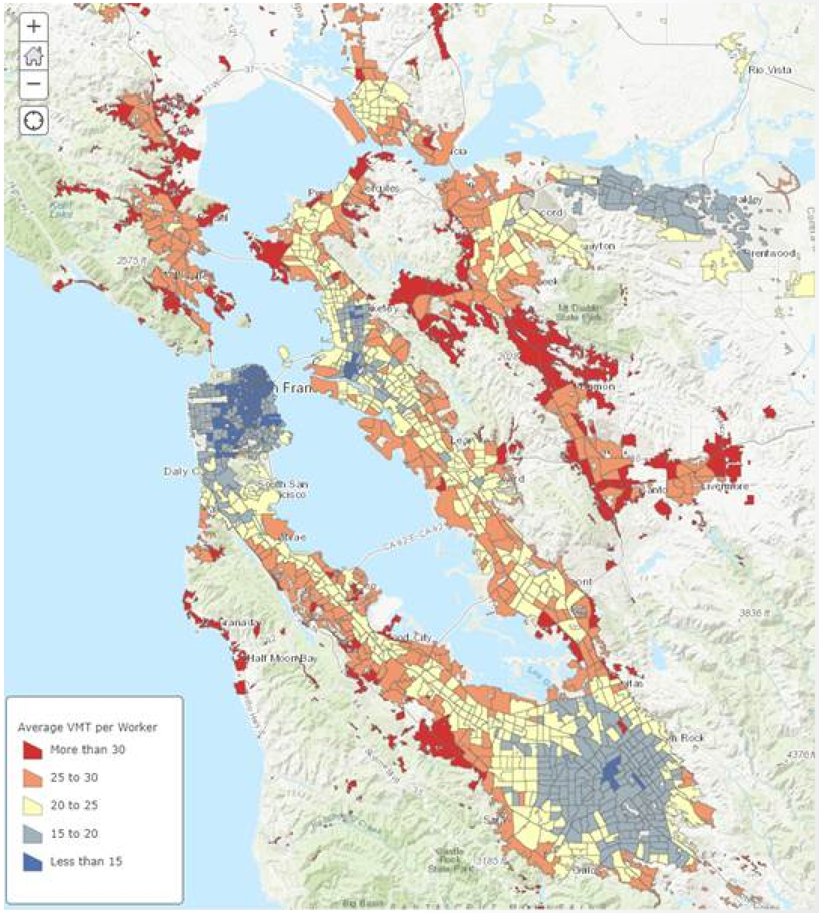
- Job market is regional
- Regardless of jobs-housing balance in and between individual cities, there is huge inter-city commute activity.
- For example: While SF has 32K worker net in-commute from SM County, a total of 130K residents between the two counties switch places every day.



Worker Flows To and From SF for 2015				
	SF Residents Who Work	Workers in SF	Net In-commute	Change in net In-commute since 1990
Bay Area Total	484,532	689,896	205,365	29,385
Alameda	21,859	107,075	85,216	44,289
Contra Costa	4,040	62,794	58,754	17,520
Marin	7,134	30,399	23,265	(5,534)
San Francisco	370,247	370,247	-	-
San Mateo	49,179	81,867	32,688	(12,858)
Santa Clara	30,541	17,173	(13,368)	(13,918)
Rest of Bay Area	1,533	20,343	18,810	(115)

Jobs Need to be Near Regional Transit:
SF is transit king in Bay Area

- Without locating significant share of expected regional job growth through 2040 in key SF locations, little chance of Bay Area meeting GHG reduction targets.



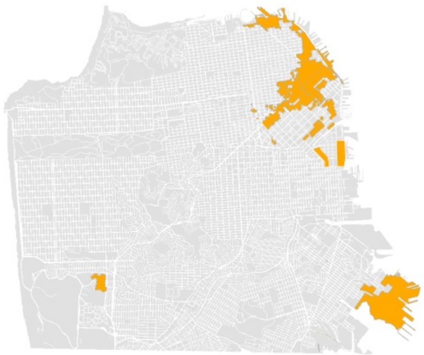
Daily VMT per worker by job location:

- Downtown SF/SOMA: 5-10
- Downtown Oakland: 12-20
- Downtown San Jose: 13-20
- Mountain View: 25-30
- Walnut Creek: 22-26
- Dublin/Pleasanton: 30+

Jobs Need to be Near Regional Transit

- Over 90% of SF off-limit to most jobs
- Besides Central SoMa and Southern Bayfront, there are no obvious appropriate places for job growth through 2040 near existing and planned transit:
  - Central Subway opening 2019
  - Caltrain Electrification, DTX, CAHSR
  - Transbay Core Capacity to SOMA/MB

Zoning allows housing



Zoning allows office

Transit Accessibility of Jobs is Key to Economic Equity

- Jobs accessible to transit are jobs accessible to people without cars
- Lower income households own fewer or no cars
- Job centers away from transit hubs are either not accessible to lower income households throughout the region or cause unreasonable financial, social and health toll from long car commutes

Other Considerations: Location/Mix of Jobs + Housing

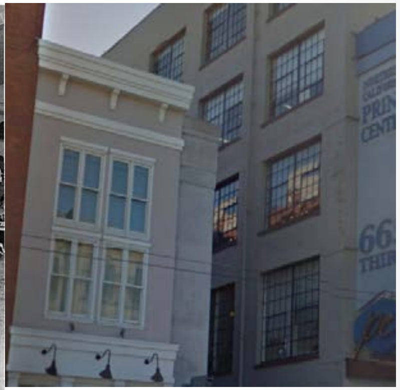
- **Economic Diversity**: Lack of commercial space supply is pricing out non-profits, arts, and small businesses


SAN FRANCISCO ◆ SINCE 1865
Examiner

Sierra Club moving headquarters from SF to Oakland due to rising rents

By Laura Dudnick on October 1, 2015 2:25 pm

- **Neighborhood Character:**
  - Many neighborhoods have historically diverse/eclectic land use patterns (SoMa, Central Waterfront) with significant job activities
  - Mixed uses creates 24/7/365 activity and interesting, urbane environment



- **Use Adjacencies:** Some sites have particular features (eg heavy industry, maritime, utility uses) that makes adjacent residential inappropriate or less desirable

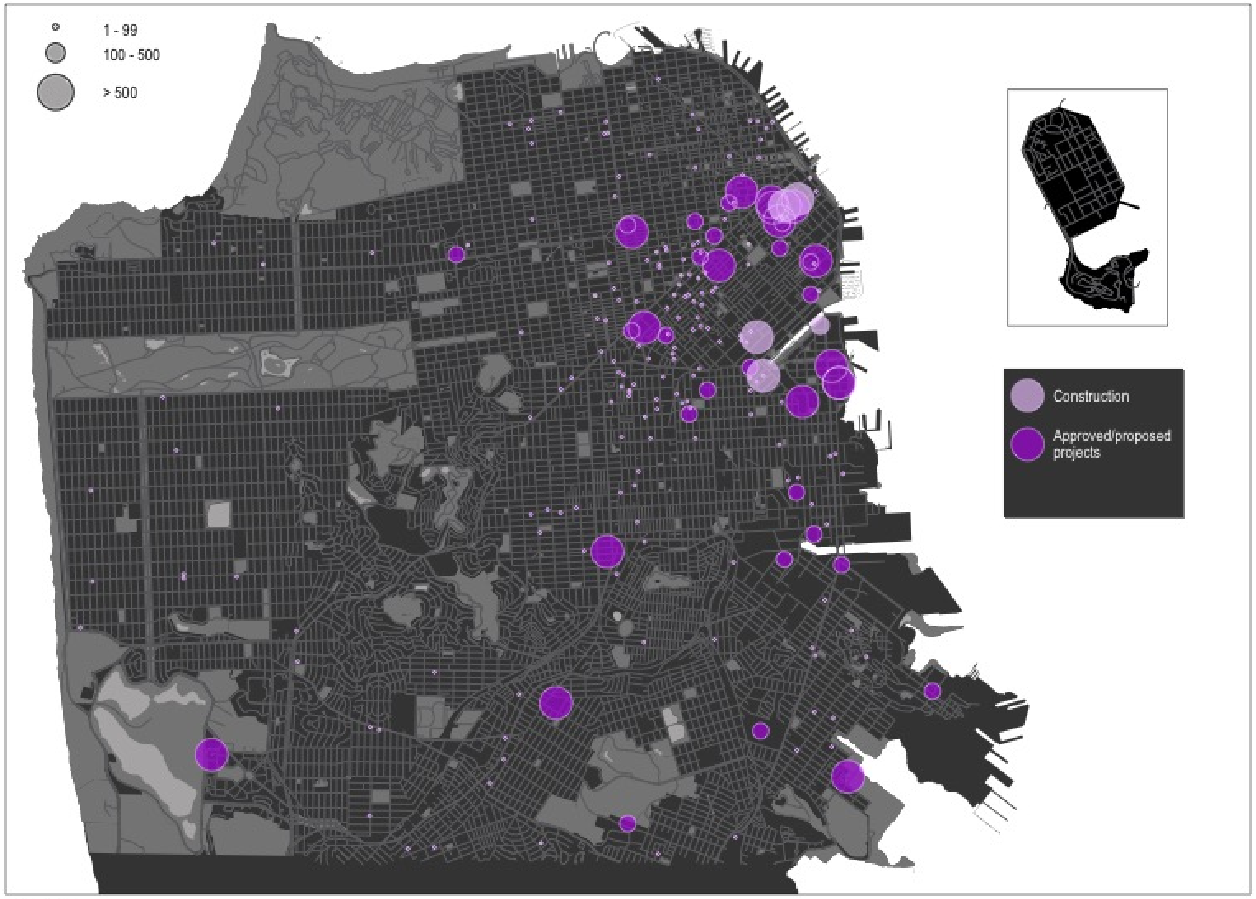
Other Considerations: Location/Mix of Jobs + Housing

- Affordable Housing Funding
  - Jobs-Housing Linkage is important source for funding MOHCD's mission-driven 100% BMR projects. In 2016/2017 J-H-L was 16% ($40m) of total funding.
  - Mandates to self-fund high BMR percentages (eg 30-40%) on specific sites/plans typically require cross-subsidy from commercial Jobs-Housing Fees or other sources
- Housing Typologies by location
  - High rise and large housing projects, while offering density, are complex and expensive to build, taking longer to bring online with higher price points. Low and mid-rise housing is cheaper and quicker to build.

Jobs Capacity: Pipeline

Total: 61,750 jobs

- Under Construction
  19,600 jobs
- Approved (individual sites)
  24,000 jobs
  (Note: Much of the "approved" sites have started construction since completion of this data, including CPMC, Chase Center, UCSF)
- Approved (master plans)
  15,000 jobs
- Proposed Applications
  3,150 jobs
  (*Excludes proposed projects dependent on rezoning*)



JOBS
Construction and approved/proposed projects

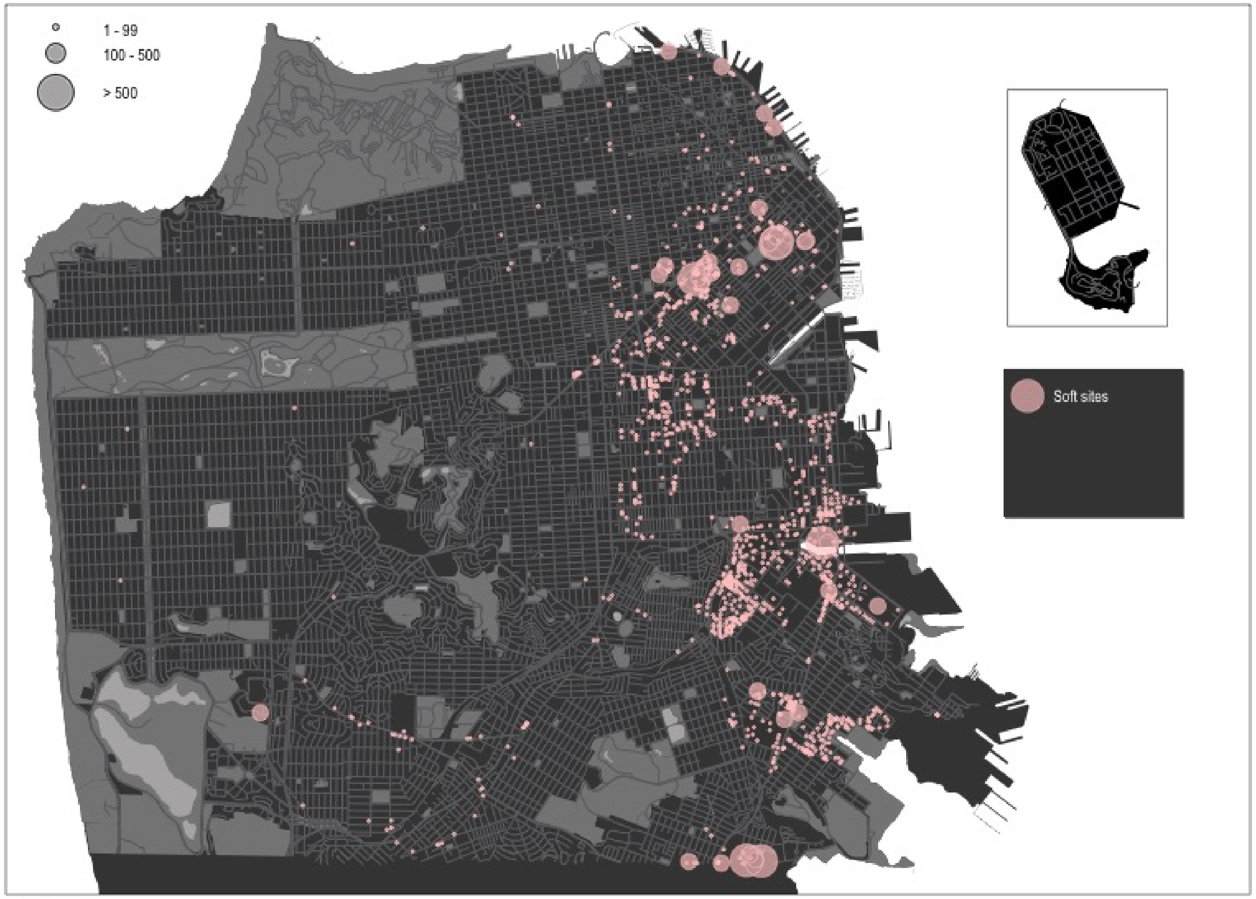
Jobs Capacity: Existing Zoning

Total: 61,500 jobs

- Soft Sites
  61,500 jobs

Assumes sites built to <30% of zoning; reduced for historic resources, sites with existing housing

(Note: These jobs mostly small scale retail/services associated with residential infill and PDR jobs in PDR districts)



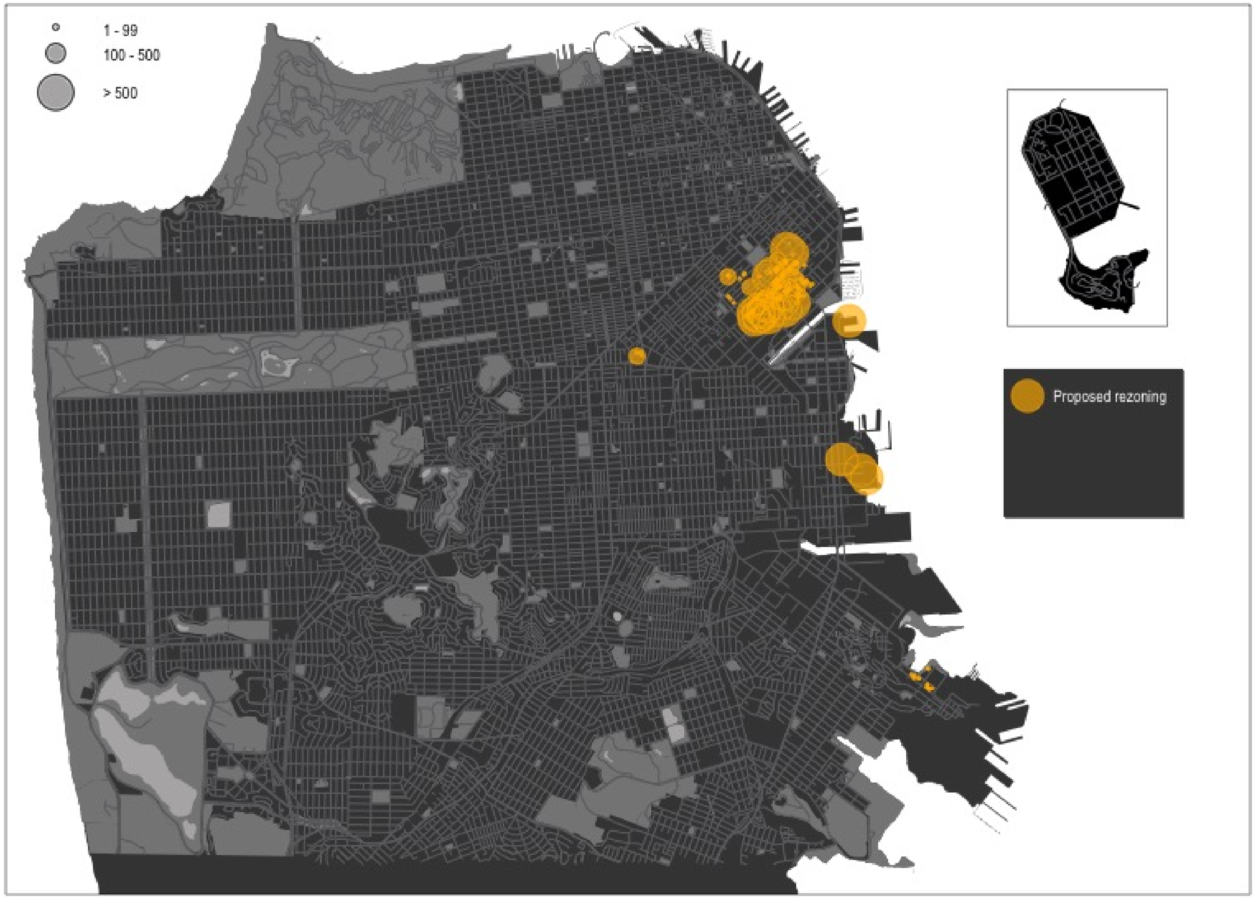
JOBS
Soft sites

Jobs Capacity: Proposed Rezoning

Total: 46,750 jobs

- Pier 70
  7,600 jobs
- Mission Rock
  5,200 jobs
- Central SoMa
  30,500 jobs
- Potrero Power Station
  3,250 jobs

(*All are Net Additional Capacity on top of underlying capacity of existing zoning*)



JOBS
Proposed Rezoning

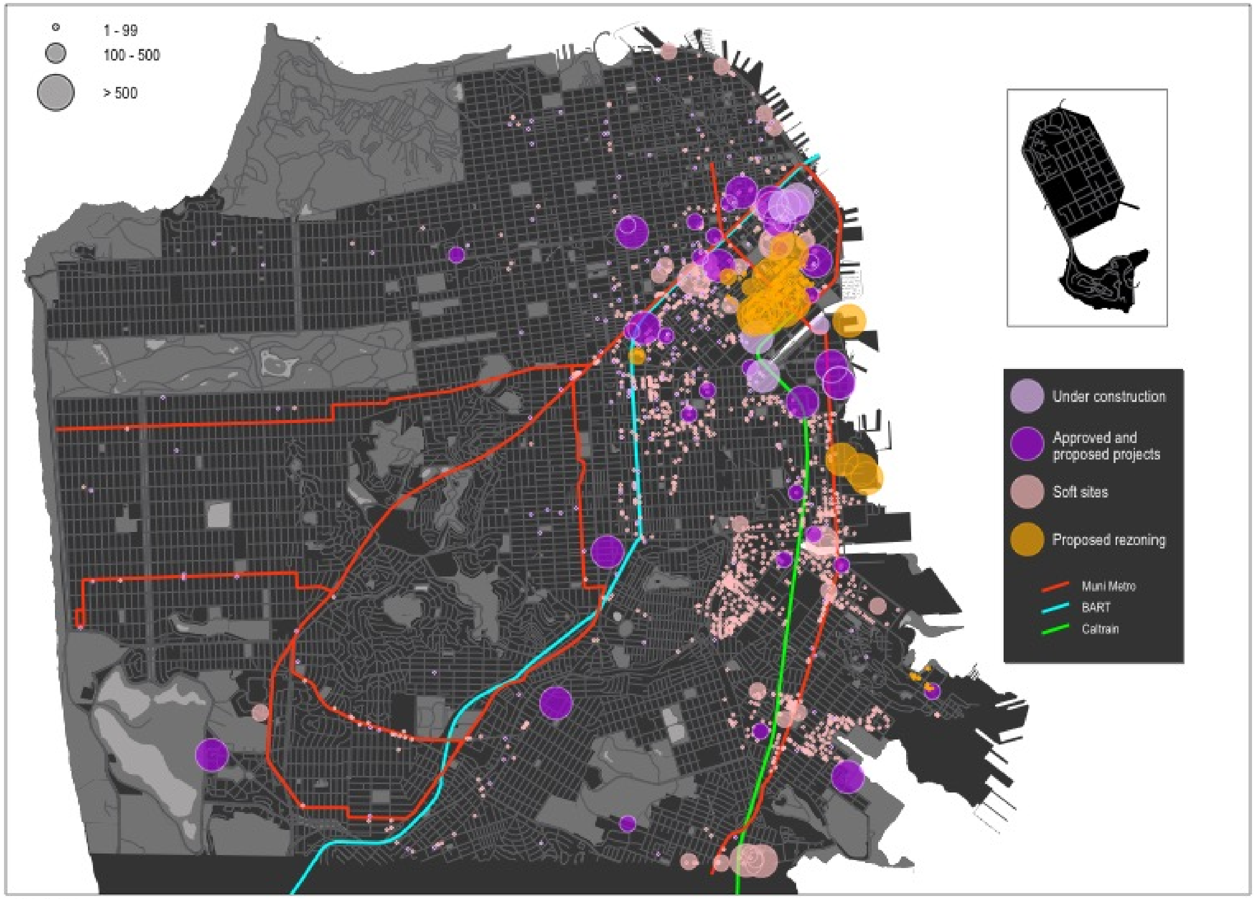
Jobs Capacity: Total

Total: 170,000 jobs

- Under Construction
  19,600 jobs
- Approved (incl. master plans)
  39,000 jobs
- Proposed Applications
  3,150 jobs
- Soft Sites
  61,500 jobs
- Proposed Rezonings
  46,750 jobs

JOBS
All Categories

Jobs Capacity: Total



JOBS
All Categories

Job Capacity: By Geography and Source

JOBS – Estimated Capacity - Existing Zoning & Proposed Rezoning

(October 4, 2017, preliminary estimates)

AREAS / PROJECTS	PIPELINE PROJECTS [1] Construction	Approved	Proposed	EXISTING ZONING Soft Sites	PROPOSED REZONING	TOTAL
SUMMARY TOTAL	19,586	39,240	3,150	61,508	46,746	170,205
Share	*12%*	*23%*	*2%*	*36%*	*27%*	*100%*
19th Avenue		1,428	4	246		1,678
Parkmerced		1,428				1,428
Bayview/Hunters Point	309	13,045	341	10,509		24,204
Candlestick Point		12,635				12,635
C-3 District	1,219	2,949		4,685		8,853
5M		2,095				2,095
Central City South	639			254		893
Eastern Neighborhoods	2,126	518	1,283	21,388	41,348	66,663
Central SoMa					30,500	30,500
Pier 70					7,600	7,600
Potrero Power Plant					3,248	3,248
Market and Octavia		1,320	121	904	198	2,543
Mission Bay	2,760	14,168		8,512	5,200	30,640
Mission Bay	296	9,727				10,023
Mission Rock					5,200	5,200
Northeast			174	4,340		4,493
Southern Neighborhoods		610		4,306		4,912
Sunset	39	52	12	1,063		1,166
Transbay/Rincon Hill	10,863	4,117	1,006	2,486		18,472
Transit Center District	9,085		1,308			10,393
Treasure & Yerba Buena Islands		901				901
Treasure Island		901				901
Van Ness Corridor	1,602			1,501		3,103
West of Twin Peaks		132		47		179
Western Addition	29		209	1,267		1,505
TOTAL	19,586	39,240	3,150	61,508	46,746	170,205
Share	*12%*	*23%*	*2%*	*36%*	*27%*	*100%*

Note: The "Projects" subtotals are the subset of key projects for each Area.

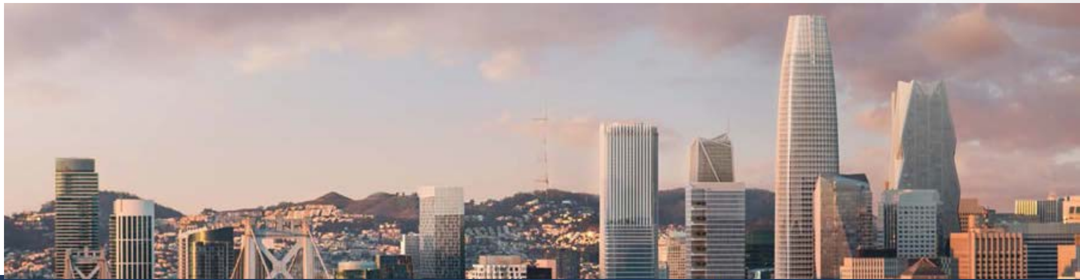
[1] Pipeline data as of 2017 Q1.

Source: SF Planning, Information & Analytics Group, Oct. 4, 2017

(*See supplemental printed chart*)

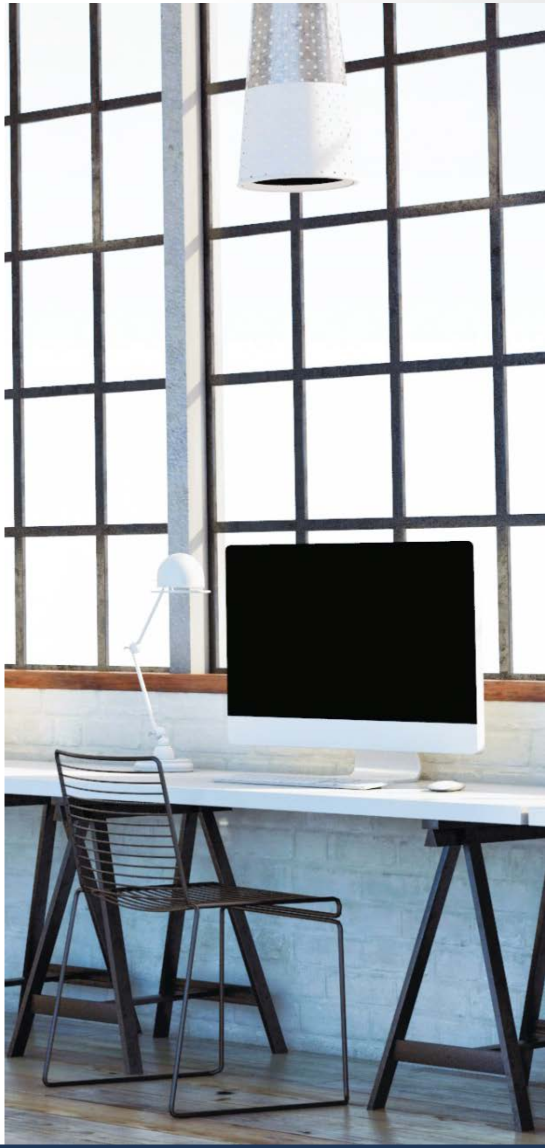
Job (Office) Delivery

- Long lead times. Of 5.1m gsf office currently under construction…
  - 2.3m gsf (space for 9,500 jobs) to be complete in 2017. All major projects were entitled 5-16 years ago!
  - Remainder 2.8m gsf to be complete over 2018-2021, of which >1m gsf (Oceanwide) not expected until 2021
- Large Site Master Plan job space will come over many years, not starting until at least 2021.



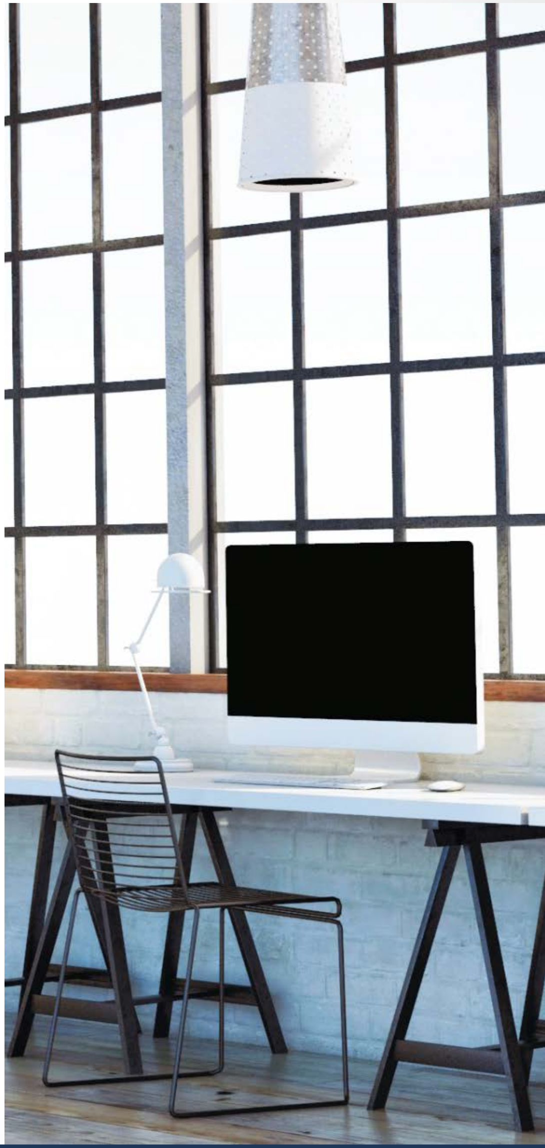
Office Worker Density

- Long-standing SF analytical factor of average 276 gsf per worker
- Anecdotal evidence of downward trend in per-employee space
- 2016-2017, City retained consultant to study office worker densities in SF
  - Diverse building typologies (eg high-rise, mid-rise large floorplate, smaller buildings)
  - Diverse neighborhoods (eg C-3, SoMa, Mission Bay)
- Draft study finding that average is possibly around 240 gsf/worker
  - Triangulated from 3 methods: Specific tenant queries, new building floorplan offerings, citywide data analysis
  - Assumes 10% historic SF average vacancy rate



Office Worker Density: Other Observations

- Many companies claim space designed to house "up to" X-thousand workers, but most hold space in reserve for growth and don't max out capacity or use all available space to most aggressive density assumptions
- Central SoMa EIR assumed 200 gsf/worker to be very conservative (pre-study), so estimated 40K jobs in EIR likely to be no more than 32K



Other Considerations/Observations

- SF office market currently at 8.4% vacancy, still 1.6% below average
- Not all new office immediately leads to new workers looking for housing
  - Some Silicon Valley/Peninsula firms looking to lease SF space to house some of their workers who already live in SF in order to reduce commute burden (ex. Facebook @ 181 Fremont)

Jobs Must Be Accompanied By Housing

We have over 60,000 units in the City’s pipeline that we need to move forward, and zoned or proposed capacity for well over another 80,000+ units that can be turned into housing.

Housing Capacity: Pipeline

Total: 60,000 units

- Under Construction
  5,875 units
- Approved (individual sites)
  17,000 units
- Approved (master plans)
  30,000 units
- Proposed Applications
  7,200 units

(*Excludes proposed projects dependent on rezoning*)

UNITS
Construction and approved/proposed projects

Housing Capacity: Existing Zoning

Total: 67,600 units

- ADUs
  16,450 units

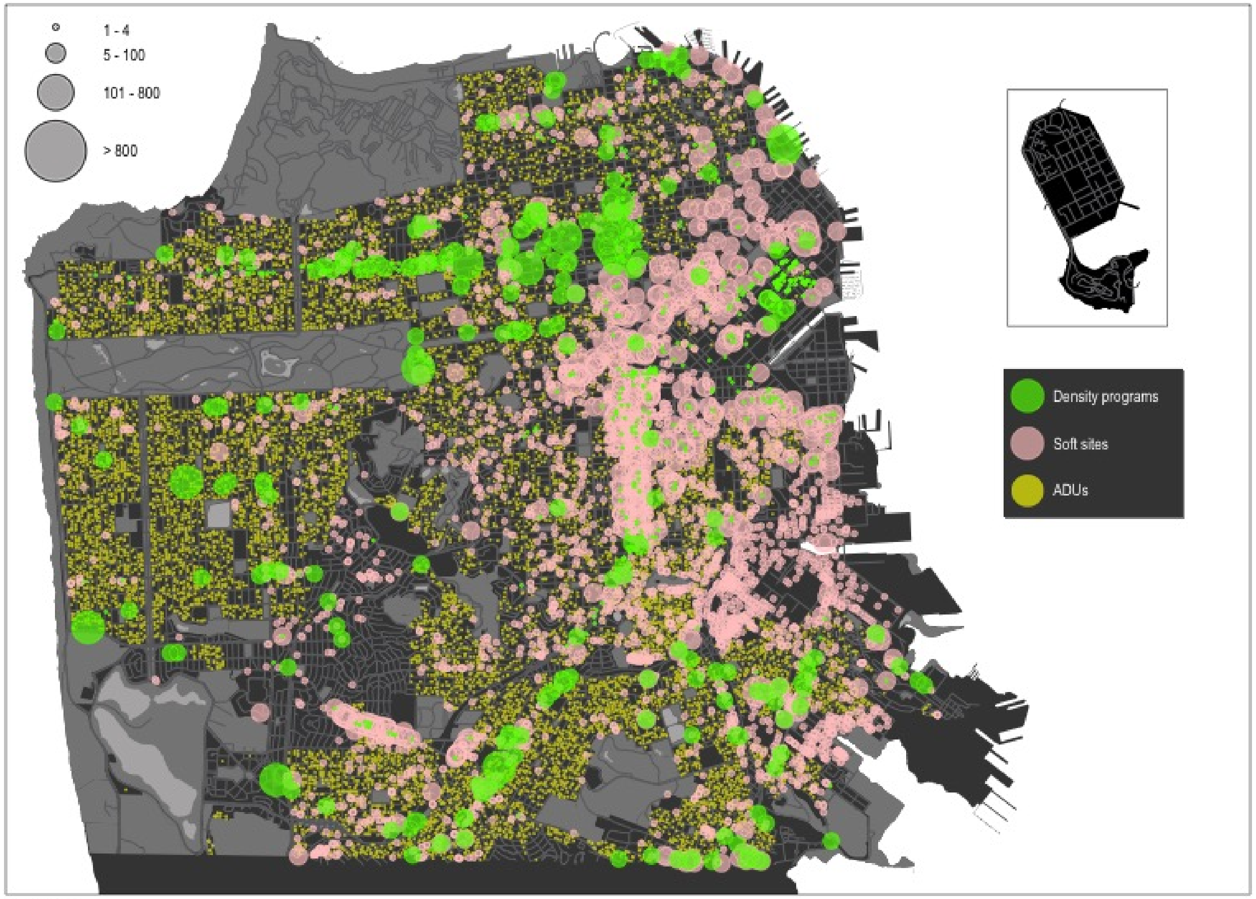
Est. likely units to be built over 25 years (approx 500 ADUs/yr, approx 11% of eligible buildings)

- Soft Sites
  41,660 units

Assumed sites built to <30% of zoning; reduced for historic resources, sites with existing housing

- Density Bonus Programs
  9,500 units

PUDs, HOME-SF, State Density Bonus



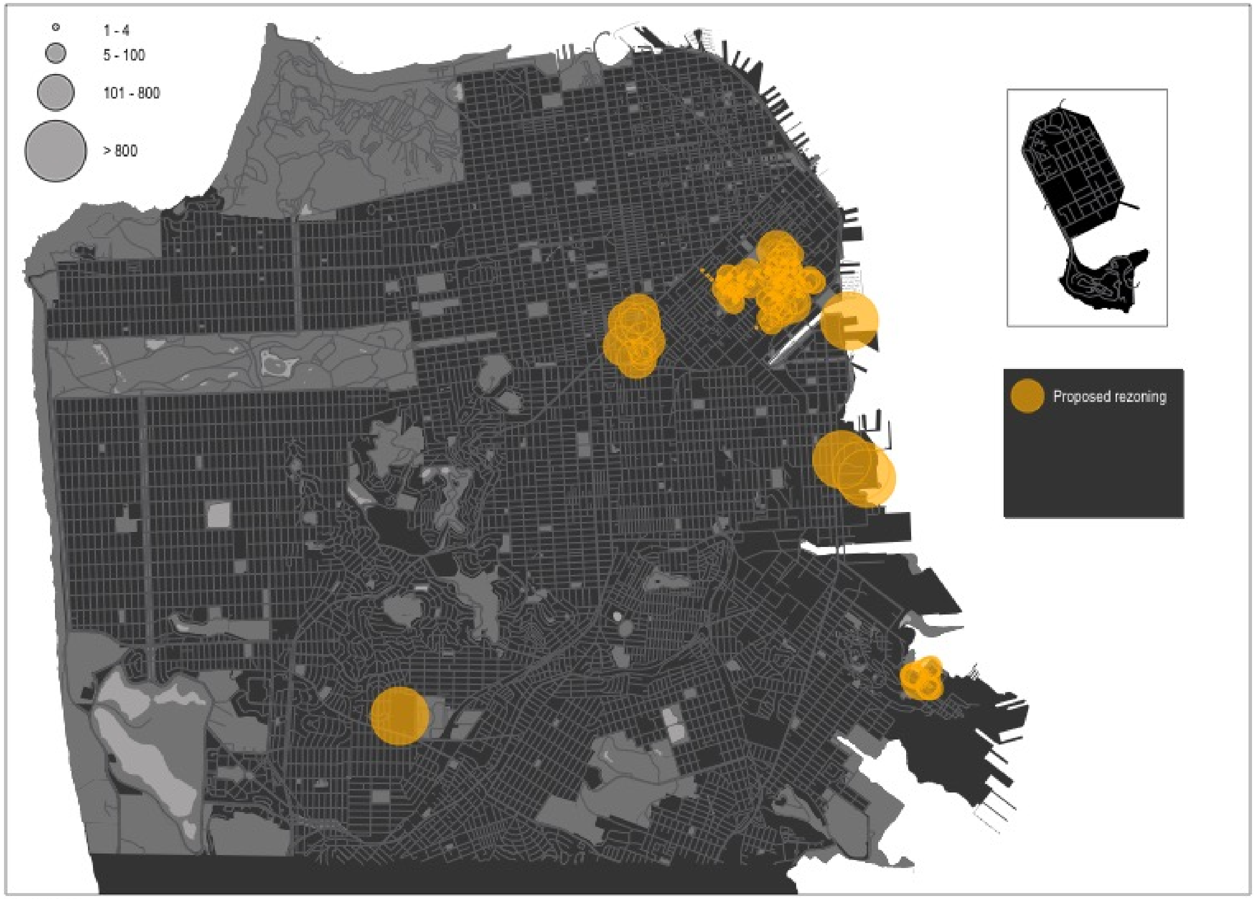
UNITS
Accessory dwelling units (ADU), soft sites, and density programs

Housing Capacity: Proposed Rezoning

Total: 15,575 units

- Pier 70
  1,800 units (middle of range)
- Mission Rock
  1,300 units (middle of range)
- Central SoMa
  5,500 units
- The Hub
  2,000 units
- Potrero Power Station
  2,675 units
- India Basin
  1,100 units
- Balboa Reservoir
  1,000 units

(*All are Net Additional Capacity on top of underlying capacity of existing zoning*)

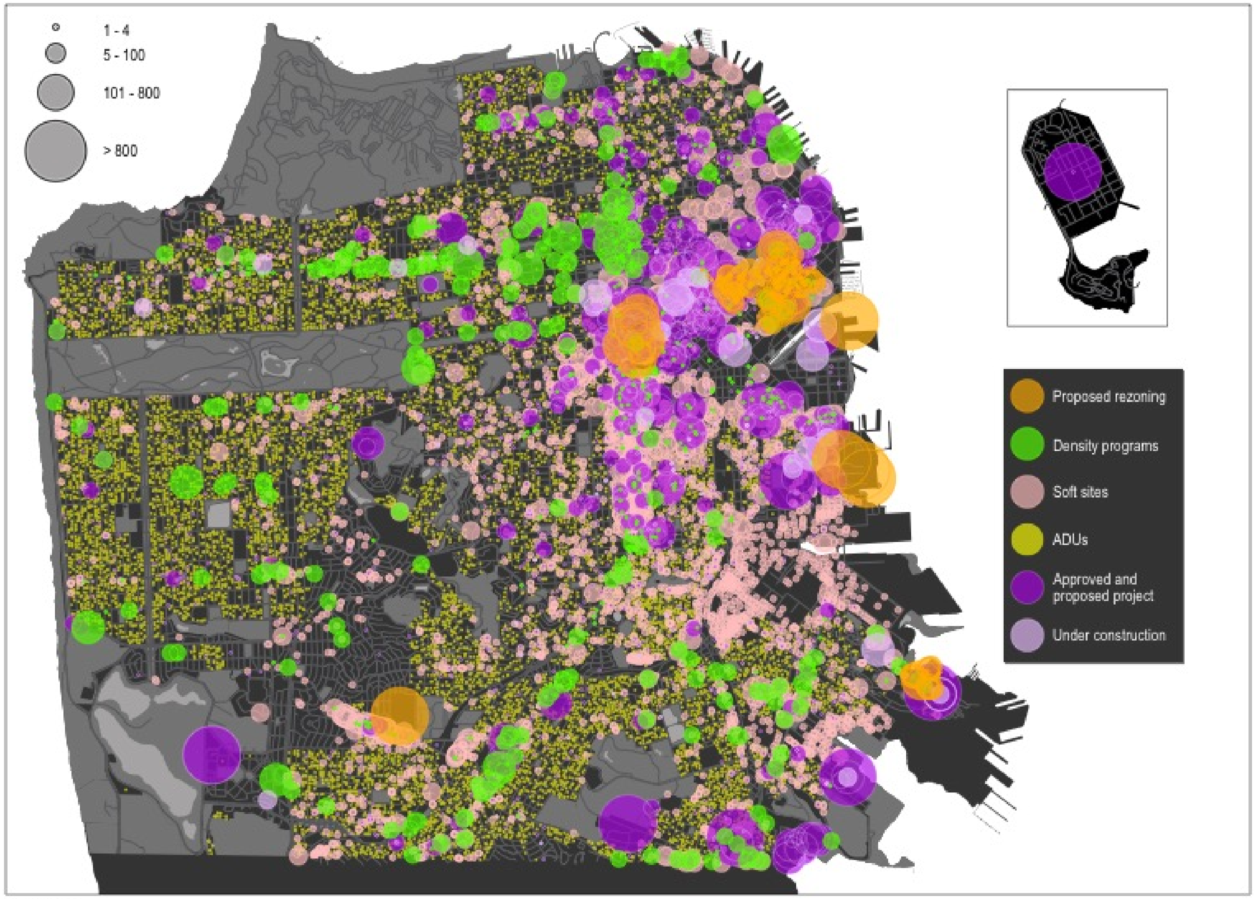


UNITS
Proposed Rezoning

Housing Capacity: Total

Total: 143,000 units

- Under Construction
  5,875 units
- Approved (incl. master plans)
  30,000 units
- Proposed Applications
  7,200 units
- ADUs
  16,450 units
- Soft Sites, incl Density Bonus Programs
  51,000 units
- Proposed Rezonings
  15,575 units



UNITS
All Categories

Housing Capacity: By Geography and Source

UNITS – Estimated Capacity - Existing Zoning & Proposed Rezoning

(October 4, 2017, preliminary estimates)

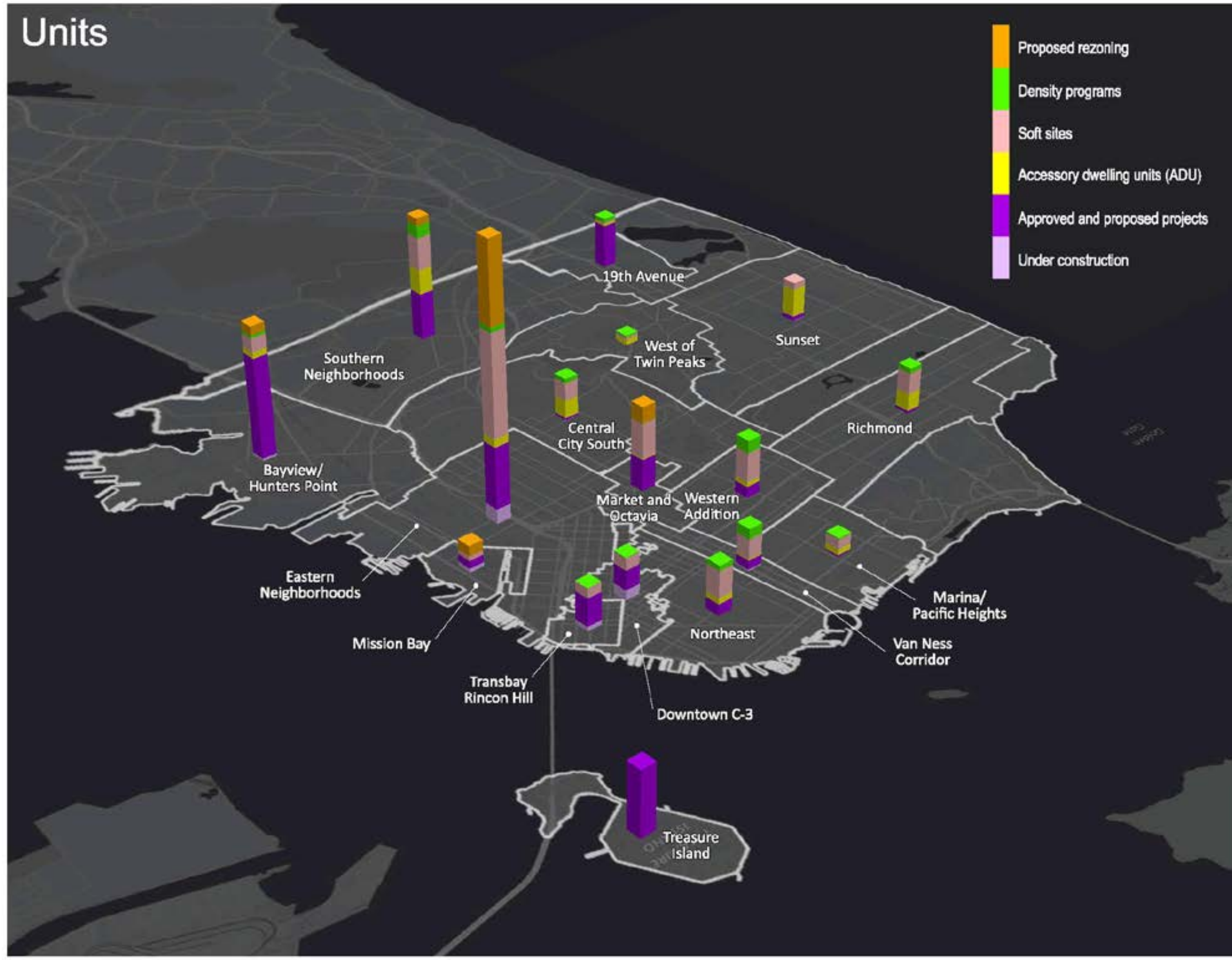
AREAS / PROJECTS	PIPELINE PROJECTS [1] Construction	Approved	Proposed	EXISTING ZONING Soft Sites	Density Programs	Accessory Units	PROPOSED REZONING	TOTAL	*Share*
SUMMARY TOTAL	5,872	46,923	7,184	41,662	9,501	16,461	15,575	143,178	100%
Share	4%	33%	5%	29%	7%	11%	11%	100%	
19th Avenue	36	5,687	0	172	490	321		6,706	5%
Parkmerced		5,679						5,679	4%
Bayview/Hunters Point	414	11,253	58	1,607	346	793	1,100	15,571	11%
Candlestick Point		9,907						9,907	7%
HOPE SF	215	31						246	0%
Hunters Point Shipyard	193	1,216						1,409	1%
India Basin							1,100	1,100	1%
C-3 District	1,261	2,231	177	1,451	82	18		5,220	4%
SNI		688						688	0%
Trinity Plaza	1,041							1,041	1%
Central City South	36	270	27	2,188	589	2,237		5,347	4%
Eastern Neighborhoods	1,764	5,499	2,125	12,468	599	992	9,980	33,427	23%
Central SoMa							5,500	5,500	4%
HOPE SF - Potrero	72	922						994	1%
Pier 70							1,800	1,800	1%
Potrero Power Plant							2,680	2,680	2%
Lake Merced		3		378	47	57		485	0%
Marina/Pacific Heights	6	134	53	1,248	142	707		2,290	2%
Market and Octavia	794	3,103	807	4,321	27	158	2,003	11,213	8%
The Hub		855					2,003	2,858	2%
Mission Bay	493	944		523		3	1,300	3,263	2%
Mission Bay	493	944						1,437	1%
Mission Rock							1,300	1,300	1%
Northeast	33	650	725	3,205	647	725		5,985	4%
Richmond	84	270	58	2,616	697	2,177		5,902	4%
Southern Neighborhoods	92	5,344	609	3,768	1,602	3,190	1,000	15,605	11%
Balboa Reservoir							1,000	1,000	1%
Executive Park		2,336						2,336	2%
HOPE SF - Sunnydale		915						915	1%
Schlage Lock		1,679						1,679	1%
Sunset	72	164	387	894	1,174	3,641		6,332	4%
Transbay/Rincon Hill	562	2,759	644	1,219	21			5,205	4%
Transit Center District	85	1,481	175					1,741	1%
Treasure & Yerba Buena Islands		7,800						7,800	5%
Van Ness Corridor	162	753	349	2,384	1,248	195		5,091	4%
West of Twin Peaks	8	14	3	299	203	674		1,201	1%
Western Addition	55	45	1,163	2,921	1,587	572	192	6,535	5%
UCSF Laurel Heights							192	192	0%
TOTAL	5,872	46,923	7,184	41,662	9,501	16,461	15,575	143,178	100%
Share	4%	33%	5%	29%	7%	11%	11%	100%	

Note: The "Projects" subtotals are the subset of key projects for each Area.

[1] Pipeline data as of 2017 Q1.

Source: SF Planning, Information & Analytics Group, Oct. 4, 2017

(*See supplemental printed chart*)



Housing Delivery: Multi-Phase Master Plans

Large (6,000+ units, 15-25 year buildout)

- TI/YBI, 7,800 units
- HPS/CS, 10,500 units
- Parkmerced, 6,000 units
  - *Total 24,300 units*

Assume approx 1,200 units/yr over 20 years

Mid-Size (1,100-3,200 units, 7-15 year buildout)

- Schlage Lock 1,700 units
- HOPE SF 3,200 units
- Pier 70, 1,800 units
- Mission Rock, 1,300 units
- India Basin, 1,100 units
- Potrero Power Station/Switchyards, 2,600 units
- Balboa Reservoir, 1,100 units
  - *Total 12,800 units*

Assume approx 1,250 units/yr over 10 years

Overall: 2020-2032 approx 2,450 units/yr

Housing Delivery: Pipeline

Rates of production

(completed units/year)

1996-2016	2,100
2000-2016:	2,300
2010-2016:	2,500
2014-2016:	3,830
2016:	5,025

Based on ***recent years performance*** and ***current pipeline***, we would expect delivery of:

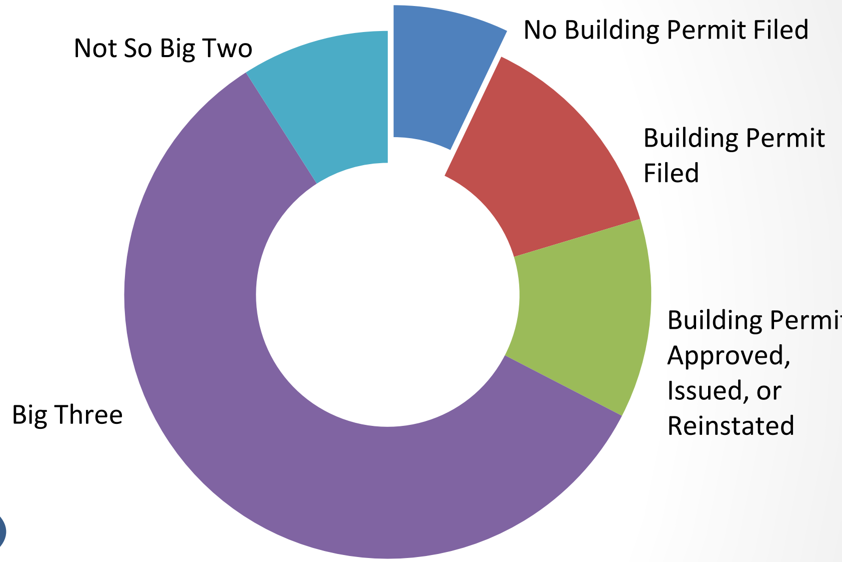
- 2017-2018 3,500-4,500 units/yr
- 2019 5,500-7,500 units
- 2020 8,500-9,500 units (incl master plans producing at least 2,400 units)
- Post-2020 ?? depends on approved pipeline in 2017 and beyond, plus 2,400/yr from master plans

- Process improvements would speed up delivery
- To deliver 5,000/yr, approved pipeline needs to be kept at least at 9,500 units; assuming 2,400/yr from master developments, other pipeline would need to be at least 5,700

Housing Delivery: Are Entitled Projects "Stalled?"

Analysis in March 2017 of the 2016 Q4 pipeline of the 12,655 approved but not yet under construction projects:

- 4,750 units Building Permit Issued, Construction Not Yet Started
- 5,150 units Building Permit Filed, Not Yet Issued
- 2,755 units No Building Permit Filed Yet



Of the 2,755: Most were ***recently entitled*** including two that were under litigation. **None of these projects are over two years past entitlement.**

- Of the whole approved pipeline, only **52 entitled projects with a total of 109 net units appear stalled at the same permitting stage for over two years**.

Housing Delivery: Affordability and Jobs-Housing "Fit"

- Each project/plan is not a wholly contained ecosystem for jobs and housing
- Individual plans/projects are being pushed to deliver highest levels of affordability feasible in consideration of other public benefit asks
- Planning is working with MOHCD to scope out a "Citywide Housing Affordability Strategy" to launch in early 2018.
  - Data-driven effort to produce updated citywide goals matched with strategies for how we get there, considering actual trends and updated projections regarding jobs, incomes, population, and the updated Growth Capacity Assessment, along with current policy and funding environment.

Housing Delivery: Changing Landscape

We need to change how we bring housing online, so these units move through the process more efficiently, more cost—effectively, and open their doors to the residents who need them now.

- State: Housing Legislative Package
- Region: CASA
- Local: Mayor's Executive Directive on Housing Production

Housing Delivery: 2017 State Housing Package

- 15 housing bills signed by Governor Brown on Sep 29
- Key highlights:
  - *Funding for Affordable Housing*: $250m/yr from new real estate fees (SB 2) and $4b bond (SB 3)
  - *Streamlining*: Ministerial approval for code-compliant projects for under-producing cities (SB 35)
  - *Inclusionary*: “Palmer Fix” (AB 1505)
  - *Accountability*: Penalties and stronger recourse against cities that disapprove housing (AB 72, 678, 1515; SB 167)
  - *Incentive Districts*: Voluntary pathways with incentives for cities to create streamlined housing districts (AB 73, SB 540)

Housing Delivery: 2017 State Housing Package – SB 35

- Likely that almost all Bay Area cities will have to ministerially approve/streamline 100% affordable housing projects
- Many key cities will likely be required to streamline market rate housing. Based on past performance (2007-2014 RHNA), this might include:
  - Oakland
  - San Jose
  - Palo Alto
  - Alameda
  - San Leandro
  - Richmond
  - Concord
  - San Rafael
  - Menlo Park
  - San Mateo

Housing Delivery : CASA

- Regional committee supported by Bay Area Metro (ABAG/MTC), spun out of Plan Bay Area 2017
- Summer 2017-Fall 2018
- Co-Chairs:
  - Fred Blackwell, San Francisco Foundation
  - Leslye Corsiglia, SV@Home
  - Michael Covarrubias, TMG Partners
- Steering and Technical Committees with regional leaders from philanthropy, government, nonprofit (including social equity and environment), business and technology, labor, market rate and affordable housing development.
- Developing an actionable political consensus around (1) increasing housing production at all levels of affordability, (2) preserving existing affordable housing, and (3) protecting vulnerable populations from housing instability and displacement.

CASA
COMMITTEE TO HOUSE THE BAY AREA

Housing Delivery : Mayor’s Executive Directive

- Issued September 29
- Goal is to “reduce entitlement times and ensure that building permits, subdivision maps and other post-entitlement permits are issued in a swift, efficient manner.”
- Facilitate completion of at least 5,000 units per year
- *Approval deadlines*: CEQA, hearing scheduling, and post-entitlement review
- *Accountability*: Departmental point person for streamlining, quarterly reports
- *Process Streamlining*: pre-entitlement and post-entitlement processes

Key Takeaways

- Our plans and decisions must be conscious of and nested in the **regional framework**.
- It is **critical for jobs to be located in core areas near major transit** to achieve environmental mandates, provide access to economic opportunity, and promote economic diversity
- There are precious **few places where job density make sense** in a local and regional context. **Site/neighborhood context also matters.**
- Housing capacity and **pipeline is growing citywide**, with more pathways to build, and **potential for delivery of 8,000+ units per year starting in 2020**, but **we need to keep expanding zoned capacity over time to keep pipeline high** and not rely on dwindling reserves of sites
- Long-range plans and zoning is not the same as approval of projects and near-term construction.
- The local and statewide **institutional framework and resources for housing delivery has new attention and resources.**

THANK YOU

www.sfplanning.org

JOBS -- Estimated Capacity - Existing Zoning & Proposed Rezoning

(October 4, 2017, preliminary estimates)

AREAS / PROJECTS	PIPELINE PROJECTS [1] Construction	Approved	Proposed	EXISTING ZONING Soft Sites	PROPOSED REZONING	TOTAL
SUMMARY TOTAL	**19,586**	**39,240**	**3,150**	**61,508**	**46,746**	**170,205**
Share	*12%*	*23%*	*2%*	*36%*	*27%*	*100%*
19th Avenue		**1,428**	**4**	**246**		**1,678**
Parkmerced		1,428				1,428
Bayview/Hunters Point	**309**	**13,045**	**341**	**10,509**		**24,204**
Candlestick Point		12,635				12,635
C-3 District	**1,219**	**2,949**		**4,685**		**8,853**
5M		2,095				2,095
Central City South	**639**			**254**		**893**
Eastern Neighborhoods	**2,126**	**518**	**1,283**	**21,388**	**41,348**	**66,663**
Central SoMa					30,500	30,500
Pier 70					7,600	7,600
Potrero Power Plant					3,248	3,248
Market and Octavia		**1,320**	**121**	**904**	**198**	**2,543**
Mission Bay	**2,760**	**14,168**		**8,512**	**5,200**	**30,640**
Mission Bay	296	9,727				10,023
Mission Rock					5,200	5,200
Northeast			**174**	**4,340**		**4,493**
Southern Neighborhoods		**610**		**4,306**		**4,912**
Sunset	**39**	**52**	**12**	**1,063**		**1,166**
Transbay/Rincon Hill	**10,863**	**4,117**	**1,006**	**2,486**		**18,472**
Transit Center District	9,085		1,308			10,393
Treasure & Yerba Buena Islands		**901**				**901**
Treasure Island		901				901
Van Ness Corridor	**1,602**			**1,501**		**3,103**
West of Twin Peaks		**132**		**47**		**179**
Western Addition	**29**		**209**	**1,267**		**1,505**
TOTAL	**19,586**	**39,240**	**3,150**	**61,508**	**46,746**	**170,205**
Share	*12%*	*23%*	*2%*	*36%*	*27%*	*100%*

Note: The "Projects'" subtotals are the subset of key projects for each Area.

[1] Pipeline data as of 2017 Q1.

Source: *SF Planning, Information & Analytics Group, Oct. 4, 2017*


Jobs
Proposed rezoning
Soft sites
Approved and proposed projects
Under construction
19th Avenue
Southern Neighborhoods
West of Twin Peaks
Sunset
Central City South
Richmond
Bayview/ Hunters Point
Market and Octavia
Western Addition
Eastern Neighborhoods
Marina/ Pacific Heights
Mission Bay
Northeast
Van Ness Corridor
Transbay Rincon Hill
Downtown C-3
Treasure Island

UNITS -- Estimated Capacity - Existing Zoning & Proposed Rezoning

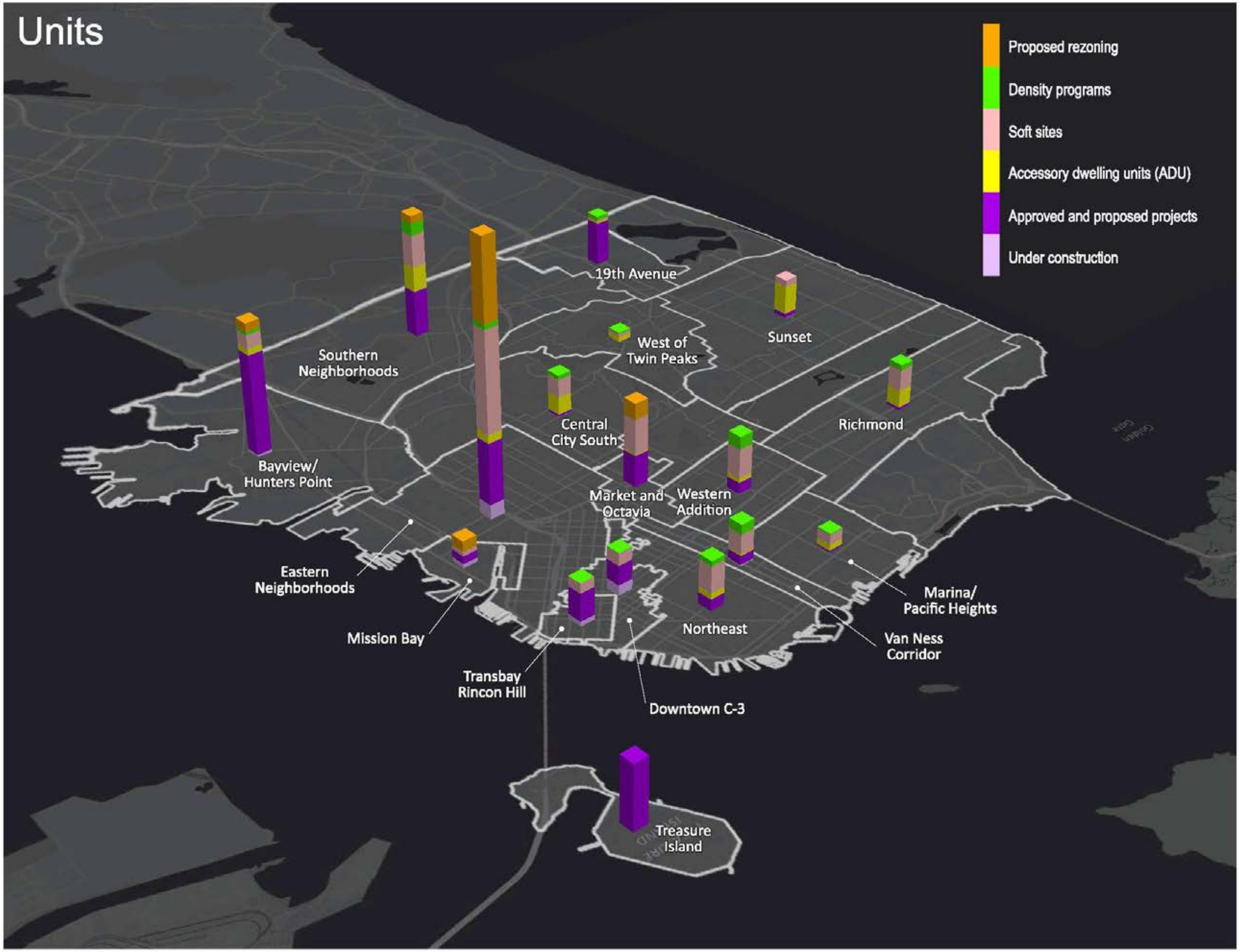
(October 4, 2017, preliminary estimates)

AREAS / PROJECTS	PIPELINE PROJECTS [1] Construction	Approved	Proposed	EXISTING ZONING Soft Sites	Density Programs	Accessory Units	PROPOSED REZONING	TOTAL	Share
SUMMARY TOTAL	**5,872**	**46,923**	**7,184**	**41,662**	**9,501**	**16,461**	**15,575**	**143,178**	**100%**
Share	*4%*	*33%*	*5%*	*29%*	*7%*	*11%*	*11%*	*100%*	
19th Avenue	**36**	**5,687**	**0**	**172**	**490**	**321**		**6,706**	**5%**
Parkmerced		5,679						5,679	4%
Bayview/Hunters Point	**414**	**11,253**	**58**	**1,607**	**346**	**793**	**1,100**	**15,571**	**11%**
Candlestick Point		9,907						9,907	7%
HOPE SF	215	31						246	0%
Hunters Point Shipyard	193	1,216						1,409	1%
India Basin							1,100	1,100	1%
C-3 District	**1,261**	**2,231**	**177**	**1,451**	**82**	**18**		**5,220**	**4%**
5M		688						688	0%
Trinity Plaza	1,041							1,041	1%
Central City South	**36**	**270**	**27**	**2,188**	**589**	**2,237**		**5,347**	**4%**
Eastern Neighborhoods	**1,764**	**5,499**	**2,125**	**12,468**	**599**	**992**	**9,980**	**33,427**	**23%**
Central SoMa							5,500	5,500	4%
HOPE SF - Potrero	72	922						994	1%
Pier 70							1,800	1,800	1%
Potrero Power Plant							2,680	2,680	2%
Lake Merced		**3**		**378**	**47**	**57**		**485**	**0%**
Marina/Pacific Heights	**6**	**134**	**53**	**1,248**	**142**	**707**		**2,290**	**2%**
Market and Octavia	**794**	**3,103**	**807**	**4,321**	**27**	**158**	**2,003**	**11,213**	**8%**
The Hub		855					2,003	2,858	2%
Mission Bay	**493**	**944**		**523**		**3**	**1,300**	**3,263**	**2%**
Mission Bay	493	944						1,437	1%
Mission Rock							1,300	1,300	1%
Northeast	**33**	**650**	**725**	**3,205**	**647**	**725**		**5,985**	**4%**
Richmond	**84**	**270**	**58**	**2,616**	**697**	**2,177**		**5,902**	**4%**
Southern Neighborhoods	**92**	**5,344**	**609**	**3,768**	**1,602**	**3,190**	**1,000**	**15,605**	**11%**
Balboa Reservoir							1,000	1,000	1%
Executive Park		2,336						2,336	2%
HOPE SF - Sunnydale		915						915	1%
Schlage Lock		1,679						1,679	1%
Sunset	**72**	**164**	**387**	**894**	**1,174**	**3,641**		**6,332**	**4%**
Transbay/Rincon Hill	**562**	**2,759**	**644**	**1,219**	**21**			**5,205**	**4%**
Transit Center District	85	1,481	175					1,741	1%
Treasure & Yerba Buena Islands		**7,800**						**7,800**	**5%**
Van Ness Corridor	**162**	**753**	**349**	**2,384**	**1,248**	**195**		**5,091**	**4%**
West of Twin Peaks	**8**	**14**	**3**	**299**	**203**	**674**		**1,201**	**1%**
Western Addition	**55**	**45**	**1,163**	**2,921**	**1,587**	**572**	**192**	**6,535**	**5%**
UCSF Laurel Heights							192	192	0%
TOTAL	**5,872**	**46,923**	**7,184**	**41,662**	**9,501**	**16,461**	**15,575**	**143,178**	**100%**
Share	*4%*	*33%*	*5%*	*29%*	*7%*	*11%*	*11%*	*100%*	

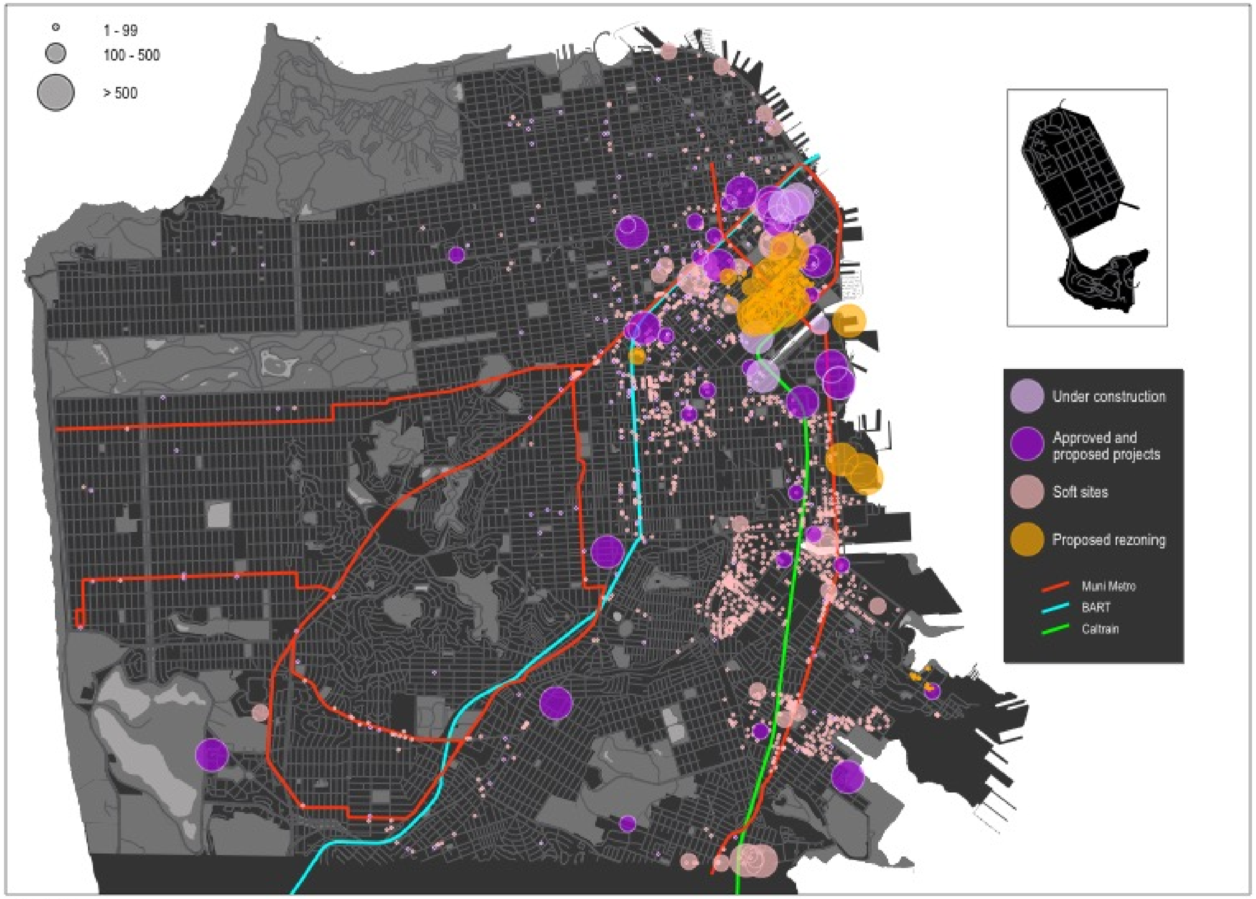
Note: The "Projects'" subtotals are the subset of key projects for each Area.

[1] Pipeline data as of 2017 Q1.

Source: *SF Planning, Information & Analytics Group, Oct. 4, 2017*

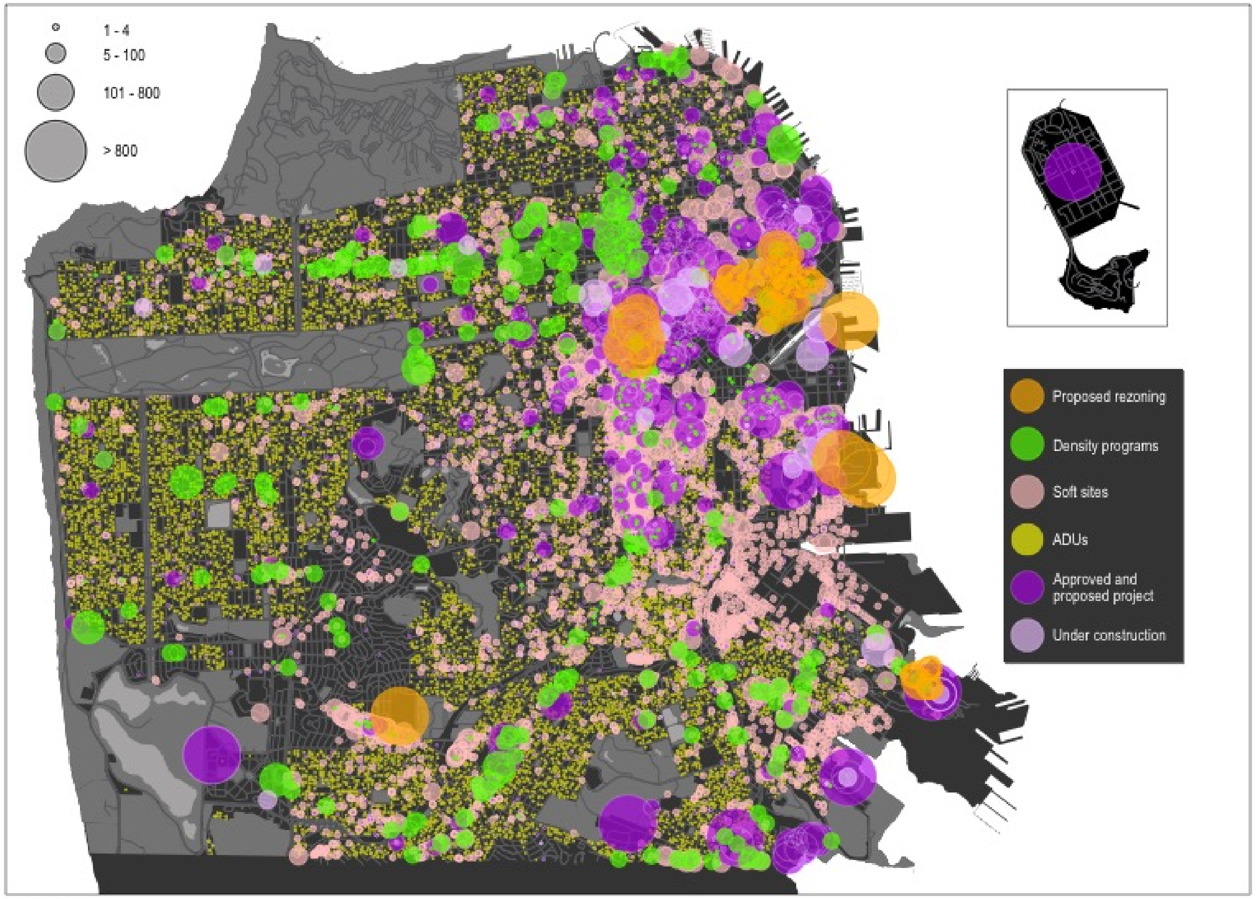

Units
Proposed rezoning
Density programs
Soft sites
Accessory dwelling units (ADU)
Approved and proposed projects
Under construction
19th Avenue
Sunset
West of
Twin Peaks
Southern
Neighborhoods
Richmond
Central
City South
Bayview/
Hunters Point
Market and
Octavia
Western
Addition
Eastern
Neighborhoods
Marina/
Pacific Heights
Mission Bay
Northeast
Van Ness
Corridor
Transbay
Rincon Hill
Downtown C-3
Treasure
Island

Jobs Capacity: Total



JOBS
All Categories

Housing Capacity: Total



UNITS
All Categories