



# OVERVIEW OF HOUSING DATA, STRATEGIES & PLANS



**San Francisco  
Planning**

*Presentation to the  
Land Use & Transportation  
Committee*

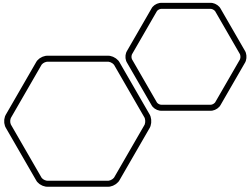
*July 27, 2020*

**Miriam Chion**  
*Housing & Equity Program  
Manager*

**Michelle Littlefield**  
*Data & Analytics Manager*

**James Pappas**  
*Senior Housing Planner*

**Svetha Ambati**  
*Senior Land Use Planner*

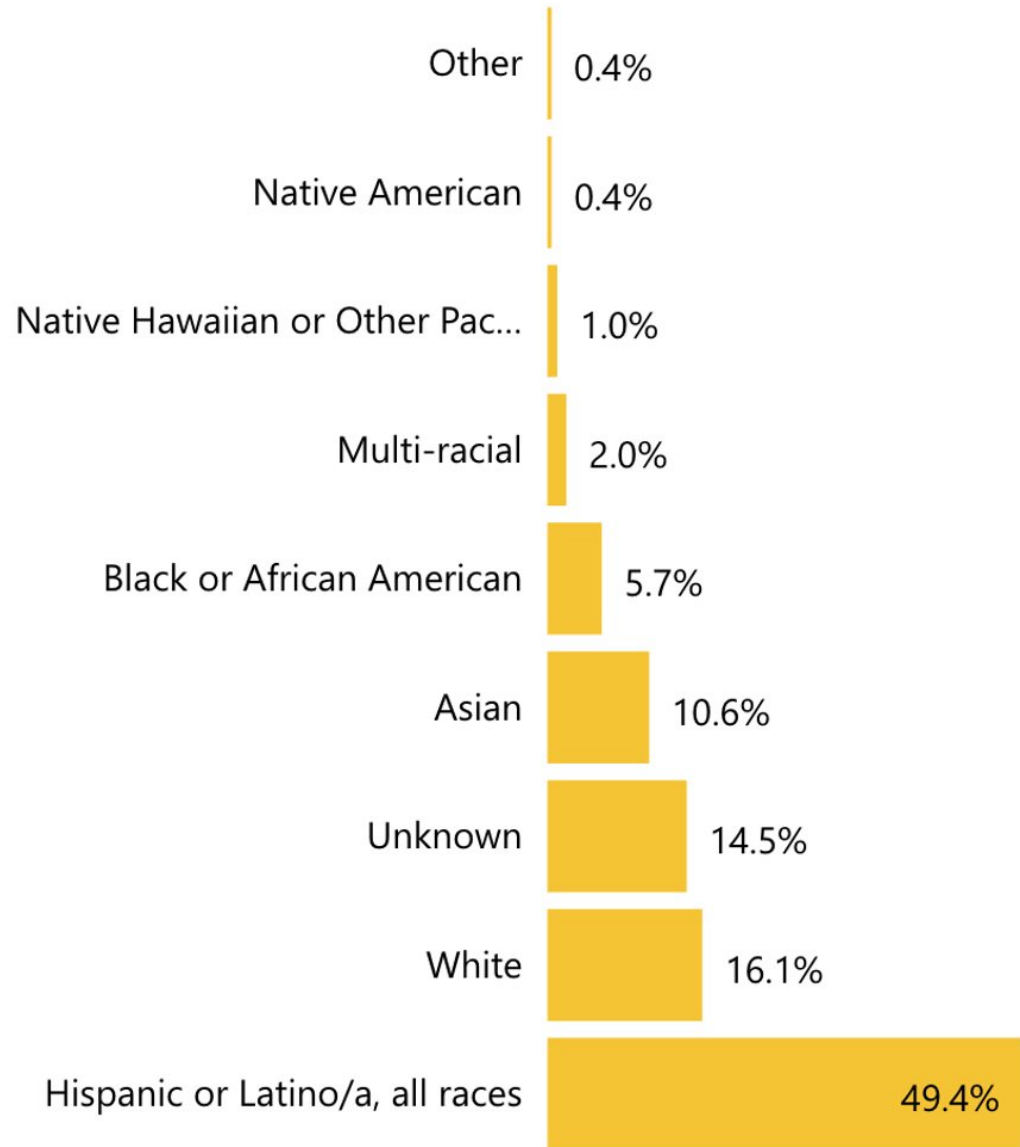


# Overview

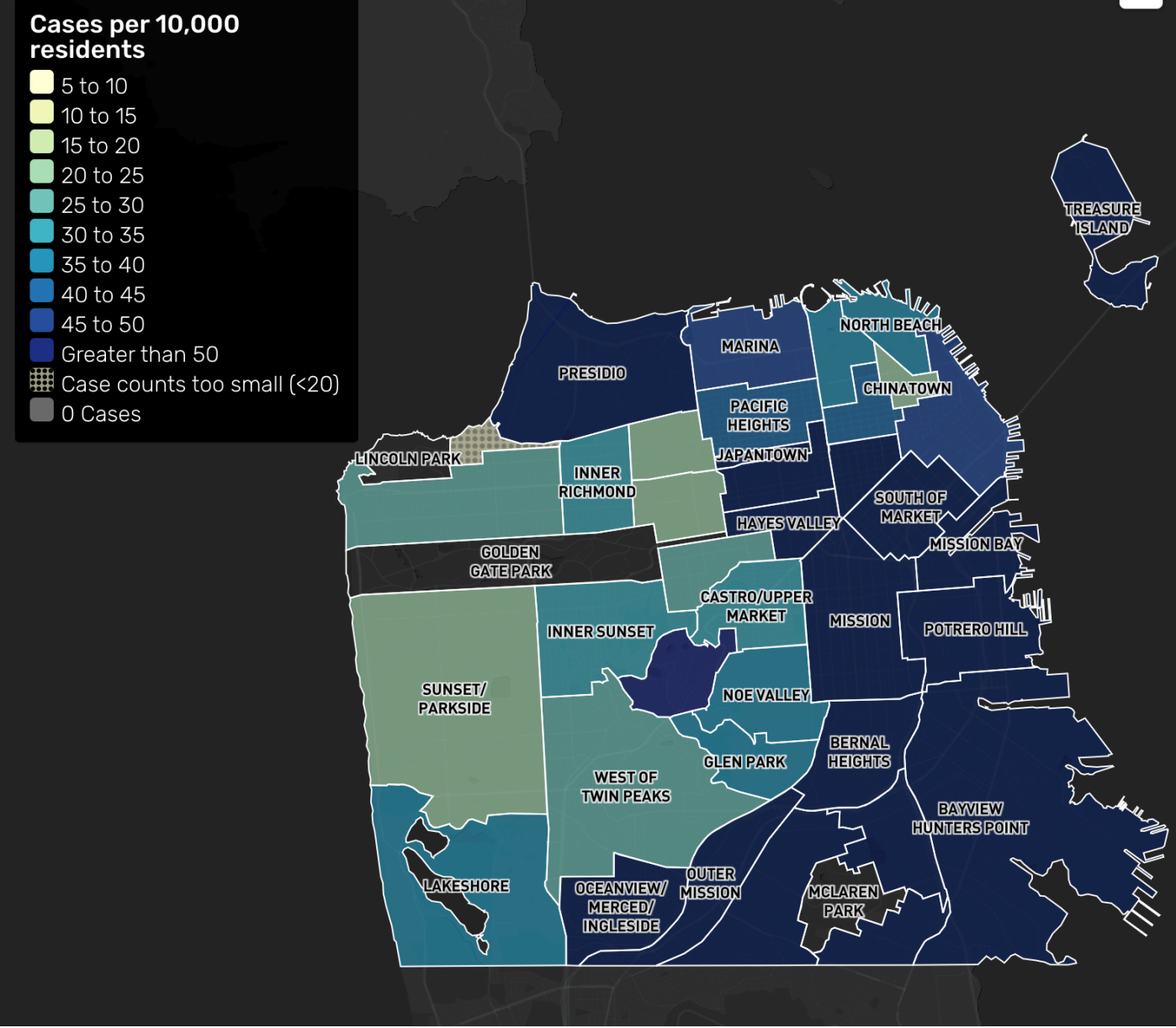
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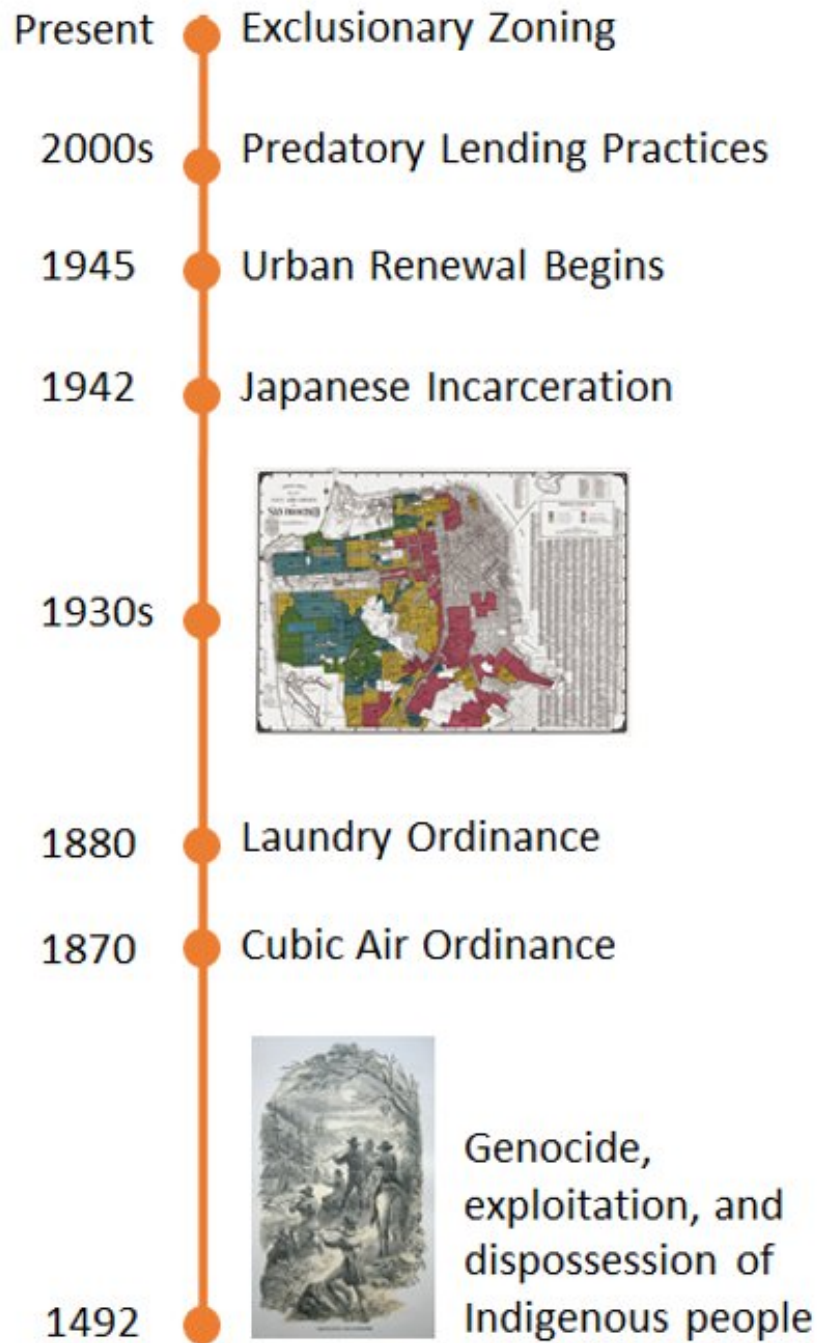
- **Context**
- **Data Reports**
- **Strategies**
- **Plans**
- **Connection**

# Cases - Race/ Ethnicity



# COVID-19 Cases





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## Cumulative impacts on American Indian, Black and other communities of color today:

- Lack of housing affordability, persistent homelessness, displacement and outmigration
- Less access to wealth building, homeownership, quality education and healthcare and jobs

*“In times of crisis, seemingly impossible ideas suddenly become possible.”*

- Naomi Klein



## **Planning Commission Resolution passed on June 11, 2020**

- **Acknowledged past wrongs.**
- **Directed the Department to center its work on Racial and Social Equity.**

# Plans and Policies informed by Data and Strategies Reports

## *Racial & Social Equity Community Engagement*

### *Plans and Policies*

- *Housing Element*
- *Recovery Policies and Legislation*



### *Data Reports*

- *Housing Reports*
- *Economic Reports*
- *Neighborhood Reports*



### *Strategies Reports*

- *Housing Recovery COVID-19*
- *Housing Affordability Strategies*
- *Community Stabilization Initiative*



### *City Collaborations*

- *Housing Delivery Director*
- *MOHCD*
- *OEWD*
- *ORE*
- *Arts Commission*
- *HRC*
- *DPH*

### *Regional Strategies*

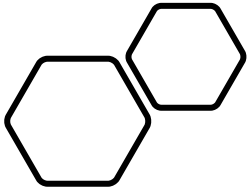


- *Plan Bay Area*
- *PDAs, PCAs, PPAs*
- *Planning grants*

### *State Legislation and Funding*



- *Legislation*
- *Governor's housing fund*
- *RHNA*



# Data & Monitoring Reports

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# Area Plan Monitoring





# 2019 SAN FRANCISCO HOUSING INVENTORY



## 2019 Q4 Housing Development Pipeline

TOTAL PIPELINE  
UNITS

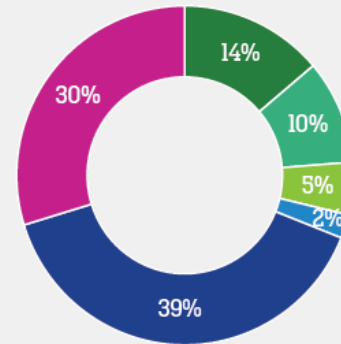
**73,819**  
net new units

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
<b>Under Review</b>	
Applications Filed	21,944

Jobs-Housing Fit  
Report

**SAN FRANCISCO PLANNING DEPARTMENT** MEMO

1500 Mission St.  
Suite 400  
San Francisco,  
CA 94103-5171

Reception:  
415.558.6278

Fax:  
415.558.4409

Planning  
Innovation:  
415.558.6377

**Notice of Electronic Transmittal**

**Planning Department Report  
Housing Balance Report No. 10  
9 March 2020**

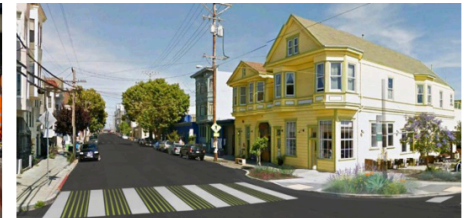
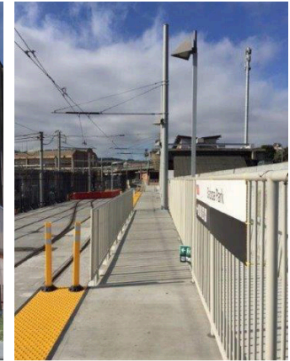
DATE: 9 March 2020  
TO: Angela Calvillo, Clerk of the Board of Supervisors  
FROM: Rich Hillis, Director - Planning Department (415) 558-6411

Housing Balance  
Report



# INTERAGENCY PLAN IMPLEMENTATION COMMITTEE

ANNUAL REPORT JANUARY 2020



## Completed

- Housing Balance Report
- Housing Inventory

## On Time

- Q2 2020 Pipeline Q3-20
- Q3 2020 Pipeline Q4-20
- Q4 2020 Pipeline Q1-21

## Target Completion

- Q1 2020 Pipeline 07/20
- Jobs-Housing Fit Q3-20
- Market & Octavia Q3-20
- Downtown Q4-20
- Commerce & Industry Q1-21
- Housing Balance Report, Fall 2020 Q1-21

# ABOUT

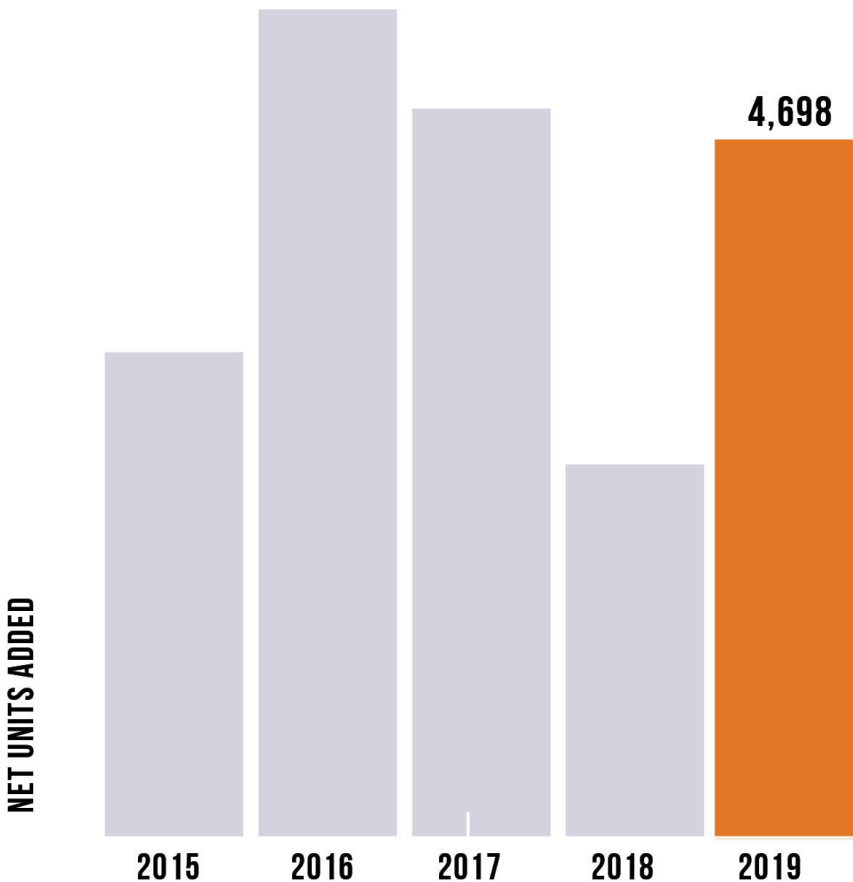
The Housing Inventory Report has been produced annually since 1967 - this year is the 50th edition.

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



# 2019 HIGHLIGHTS— HOUSING PRODUCTION



## NEW UNITS

CHANGE FROM 2018

4,858

▲ 85%

## UNITS LOST

CHANGE FROM 2018

160

▲ 44%

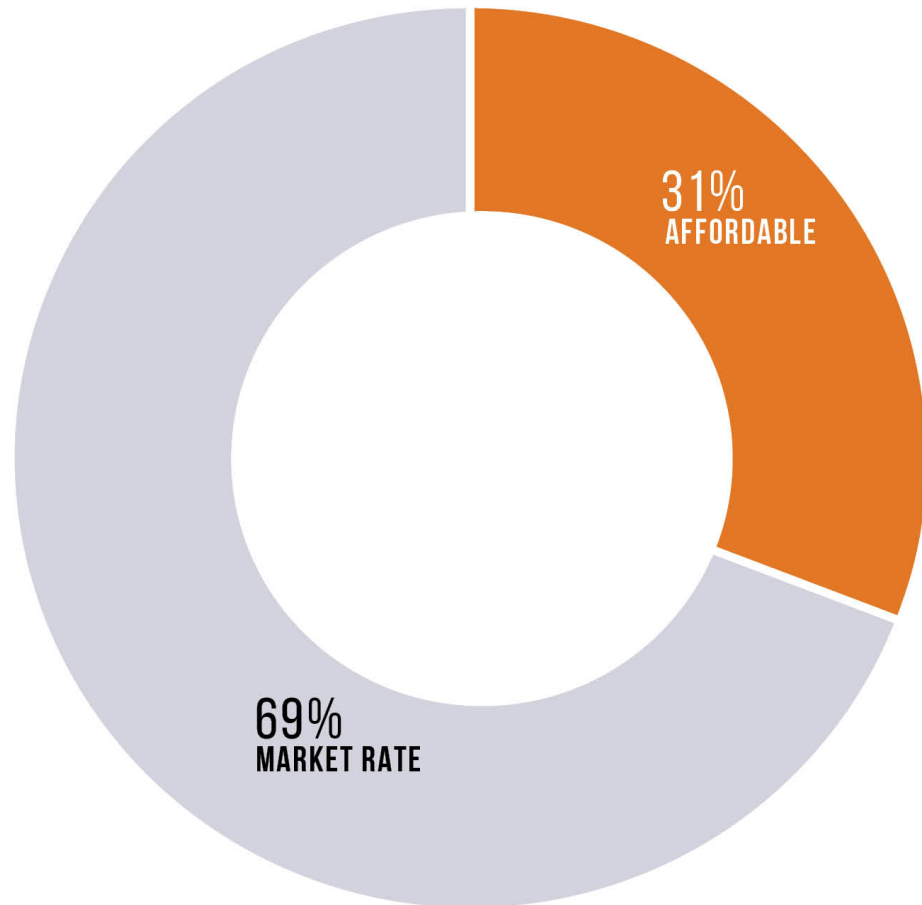
## NET UNITS ADDED

CHANGE FROM 2018

4,698

▲ 82%

# 2019 HIGHLIGHTS— 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%

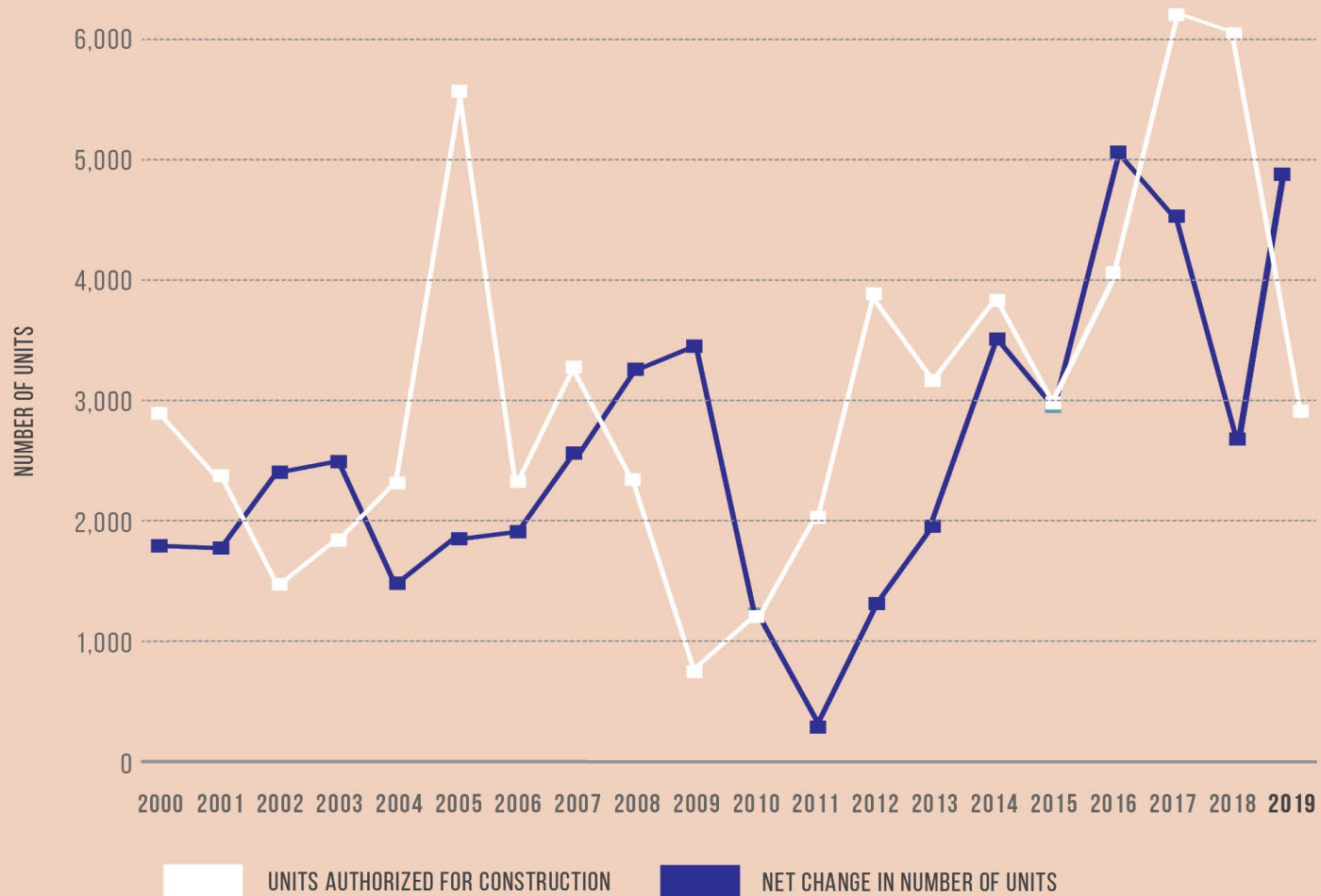
# 2019 HIGHLIGHTS— AUTHORIZED UNITS

## UNITS AUTHORIZED FOR CONSTRUCTION

2,944

▼52%

20-YEAR UNIT AUTHORIZATION TRENDS, 2000–2019




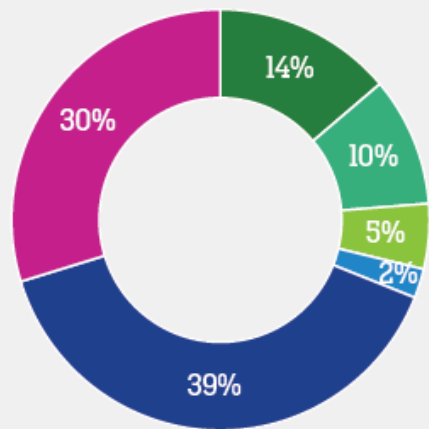







# **Quarterly Residential Pipeline**




# 2019 Q4 Housing Development Pipeline











<b>TOTAL PIPELINE UNITS</b> <b>73,819</b> net new units	<b>AFFORDABLE UNITS *</b> <b>14,372</b> net new units		<b>19%</b> Affordable
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Entitled		Net Units
	Under Construction	10,198
	Building Permits Approved	7,339
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	Major Multi-Phased Projects ***	28,977

Under Review		Net Units
	Applications Filed	21,944

	<b>Candlestick Point/Hunter's Point Shipyard</b> <b>9,119</b>		<b>Treasure Island</b> <b>7,397</b>		<b>Parkmerced</b> <b>4,666</b>		<b>Potrero Power Plant</b> <b>2,682</b>
	<b>Pier 70</b> <b>1,596</b>		<b>HopeSF - Potrero and Sunnydale</b> <b>1,445</b>		<b>India Basin</b> <b>1,575</b>		<b>Balboa Reservoir</b> <b>1,300</b>
	<b>Schlage Lock</b> <b>1,040</b>		<b>Mission Rock</b> <b>786</b>				

UPDATED Feb 2020  
For Status as of Dec 31, 2019



# **Housing Balance Report**

# HOUSING BALANCE REPORT NO. 10

## CUMULATIVE HOUSING BALANCE

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21.5%

## EXPANDED CUMULATIVE HOUSING BALANCE

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28.6%

## CHANGE FROM REPORT NO. 9

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



# **RHNA Annual Progress Report**

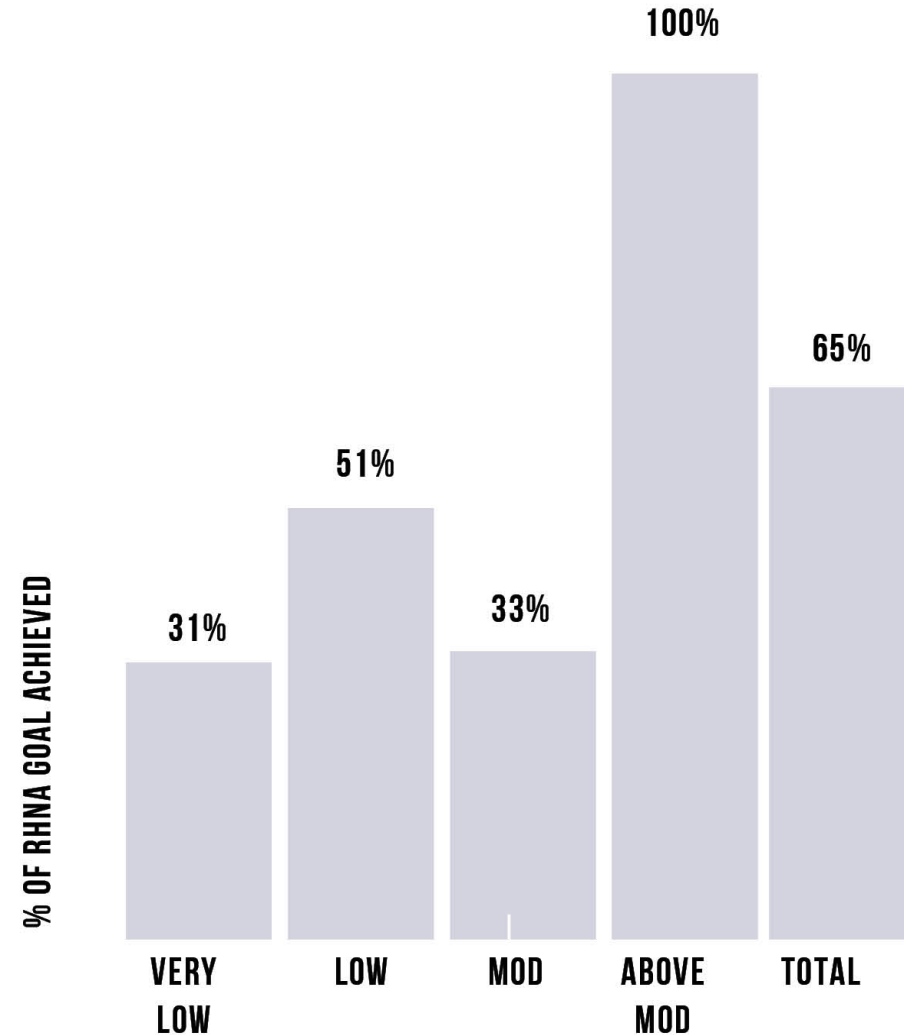
# REGIONAL HOUSING NEEDS ALLOCATION

## 2019 TOTAL & PERCENTAGE OF RHNA GOALS MET

3,297 UNITS

65%

PERMITTED UNITS ISSUED BY AFFORDABILITY				
INCOME LEVEL	RHNA BY INCOME LEVEL	TOTAL UNITS TO DATE (2015-2019)	% OF GOAL ACHIEVED (2015-2019)	TOTAL REMAINING RHNA BY INCOME LEVEL
VERY LOW	6,234	1,948	31%	4,286
LOW	4,639	2,372	51%	2,267
MOD	5,460	1,800	33%	3,660
ABOVE MOD	12,536	17,373	100%	0
TOTAL RHNA	28,869			



# RECAP ON DATA REPORTS PUBLISHED

## HOUSING PRODUCED IN 2019

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**4,698** UNITS  
31% AFFORDABLE

## HOUSING AUTHORIZED IN 2019

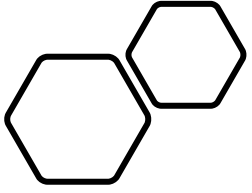
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**2,944** UNITS  
59% AFFORDABLE

## HOUSING IN THE PIPELINE

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**73,819** UNITS  
19% AFFORDABLE



# Strategies

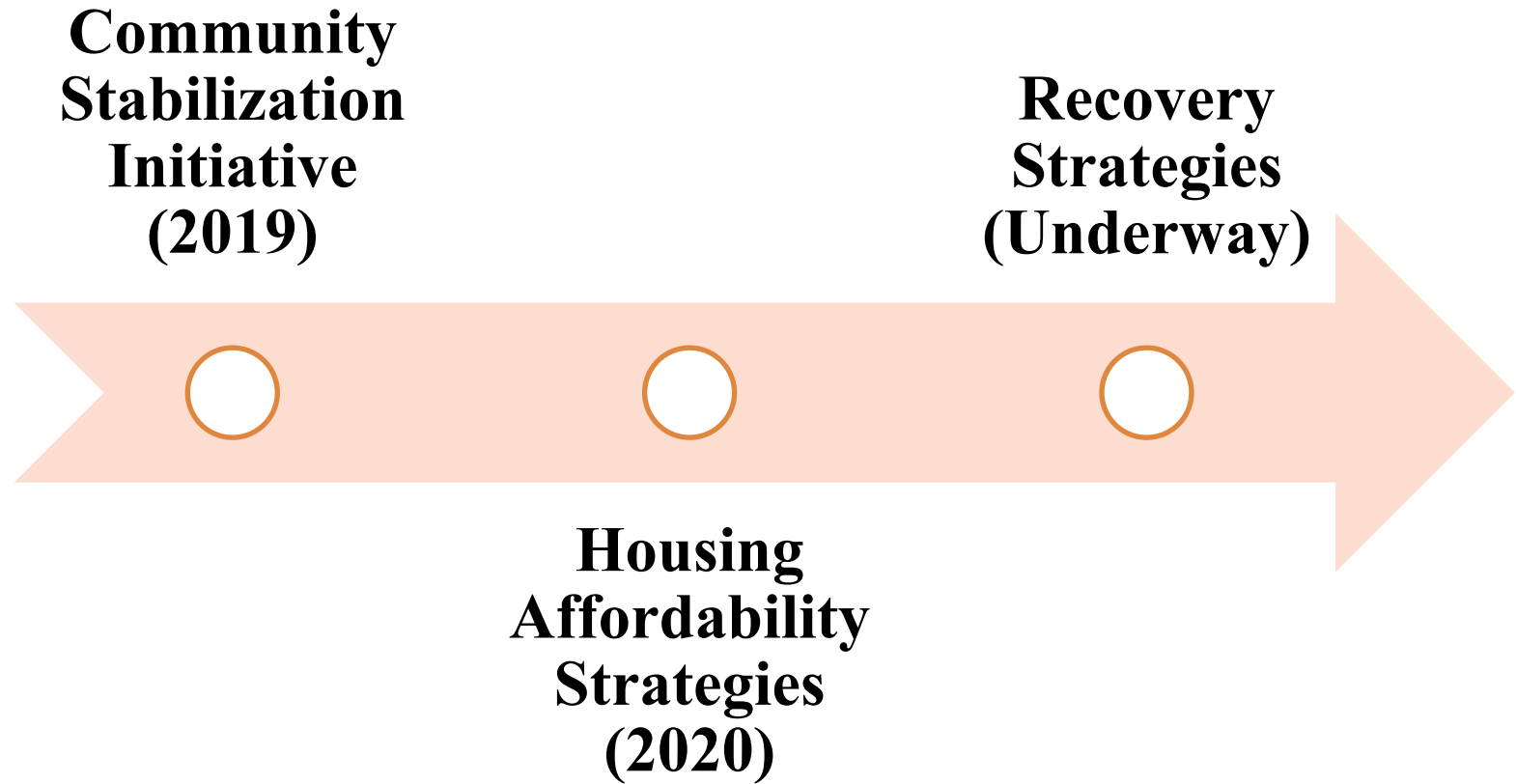
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# Strategies

- Highlight strategies to stabilize communities and improve affordability
- Respond to concerns from community and policymakers
- Analyze existing and potential policies, programs, and investments

# Status





# Community Stabilization Initiative

## Project Goals:

- Protect and stabilize communities, especially vulnerable populations
- Mitigate the impacts of ongoing displacement
- Help all residents thrive and contribute to the City's culture and economy



PUBLIC DRAFT - OCTOBER 2019

## Community Stabilization Report



# Project Deliverables



The screenshot shows the San Francisco Planning website. At the top, there is a navigation bar with "About", "Inventory of", and "All Considerations" links, along with a search icon. Below this is a dark blue banner with the text "DRAFT San Francisco's Community Stabilization" and a "Take Our Survey" button. The main content area features a large image of a diverse group of children and adults. Overlaid on this image is the text "SAN FRANCISCO'S COMMUNITY STABILIZATION" and "POLICY AND PROGRAM INVENTORY AND PRIORITIES". Below the image is a paragraph of text: "The Community Stabilization initiative is a multi-agency effort to assess the City's existing portfolio of tools, unify efforts into one comprehensive inventory, and identify priorities. The initiative seeks to mitigate the impacts of ongoing displacement and help vulnerable populations thrive and contribute to the City's economy and culture." A "Learn more" button is positioned below the paragraph. Further down, there are three boxes representing different deliverables: "Draft Report", "Draft Policy and Program Inventory: Summaries (Coming Soon)", and "Draft Policy and Program Inventory: Ideas for Future Consideration Toolkit". At the bottom, there is a blue banner with a speech bubble icon and the text: "Please note: this is a draft document for public review. Please share your comments on the draft Community Stabilization Policy and Program Inventory and Priorities!" and a "Take Our Survey" button. The footer includes a language selection dropdown, the Google Translate logo, the year "2019", the San Francisco Planning Department name, and the website "sfplanning.org". The San Francisco Planning logo is also present in the bottom right corner.



PUBLIC DRAFT - OCTOBER 2019

## Community Stabilization Report



### *Policy and Program Inventory, Fall 2019*

*includes:*  
*assessments and ideas for future consideration*

### *Executive Summary and Report, Fall 2019*

*includes:*  
*existing conditions, summary of existing efforts, key priorities*



# Community Stabilization: Enhancements To Existing City Policies & Programs

- Tenant protections and housing stabilization
- Affordable housing preservation and production
- Arts and cultural stabilization
- Small businesses and neighborhood commercial districts
- Workforce development programs

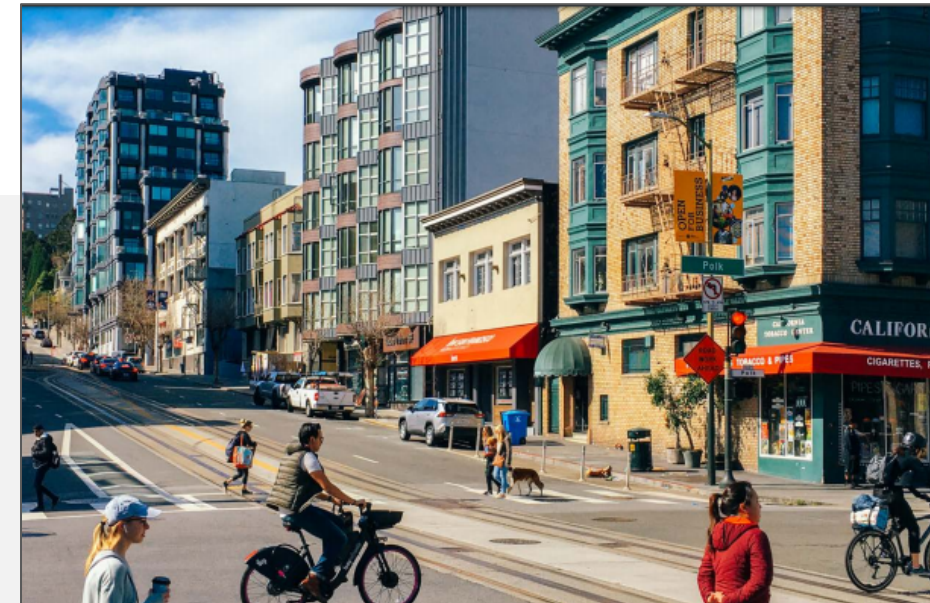


## **Community Stabilization: Examples of Potential Programs And Policies**

- Housing registry
- Work with state to expand local authority to provide tenant protection
- Continuing to expand support for those experiencing homelessness

# Housing Affordability Strategies

- **Key question:** How can the City do more to improve affordability and meet housing targets?
- **Process:**
  - Worked with consultant team to analyze policies and investments
  - Feedback from public, nonprofit and for-profit developers, advocates, service providers, and researchers
- **Analysis and outreach will inform:**
  - 2022 Housing Element
  - Housing policy implementation and neighborhood planning



FINAL REPORT - MARCH 2020

## San Francisco Housing Affordability Strategies



San Francisco  
Planning

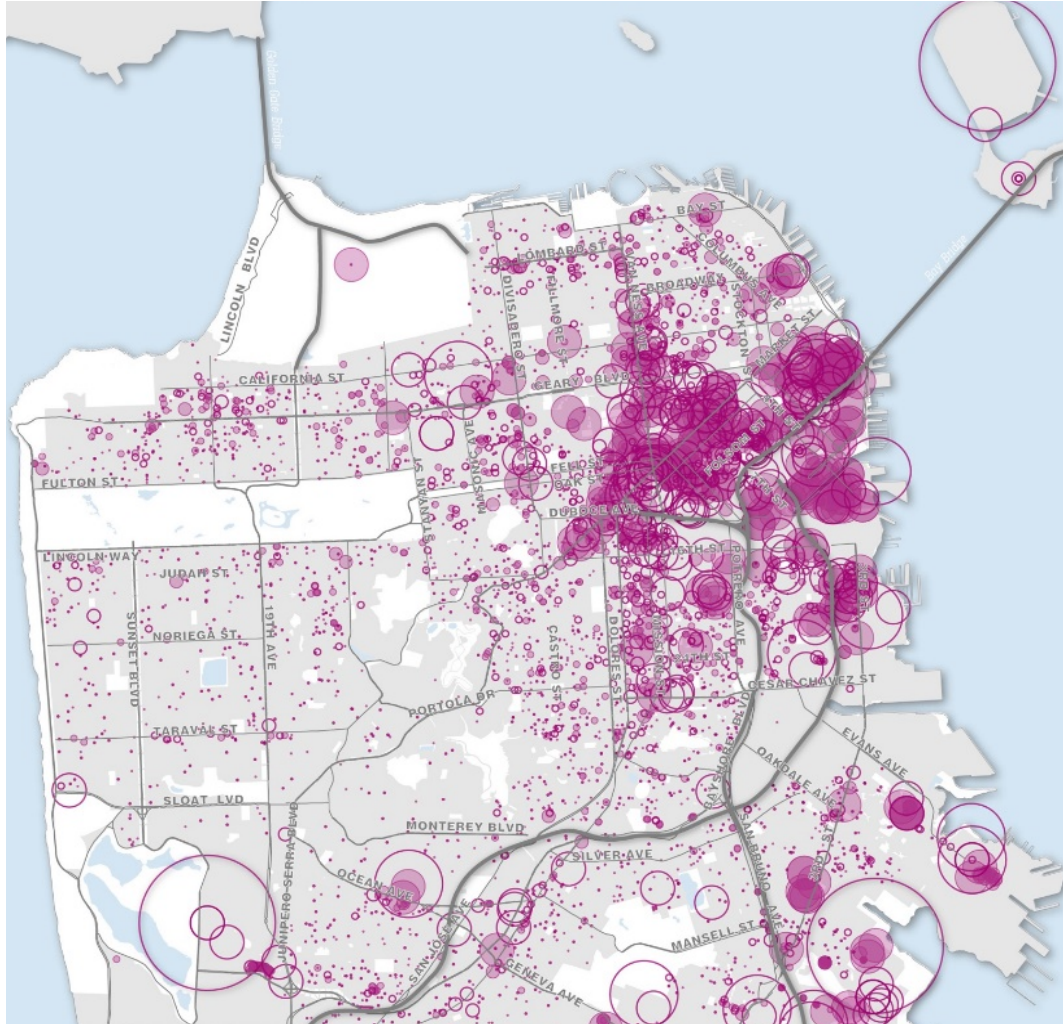
Final Report March 2020

# Housing Targets

- **How do we sustain the following over 30 years:**
  - Mayor's goal of 5K new units per year
  - At least 1/3 of new units affordable to low and mod-1,670 units (Proposition K)
  - Preserve 1,100 more affordable units per year
  - Increase stability for our vulnerable residents
- Would reach current RHNA, but next RHNA will likely double (at least)
- We have fallen short of 5k unit target and affordable housing targets



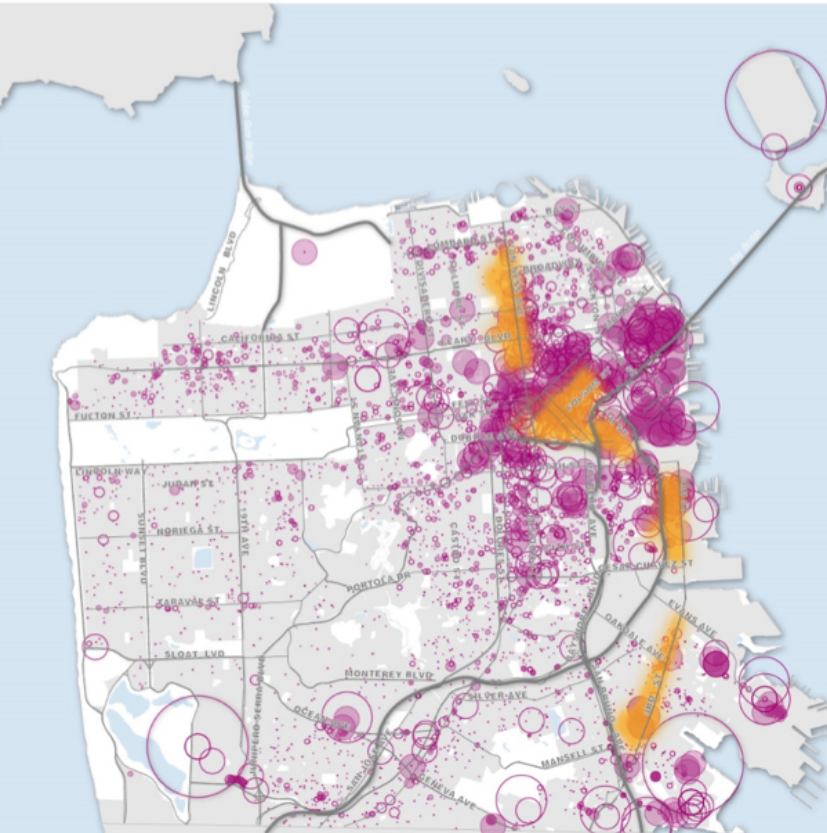
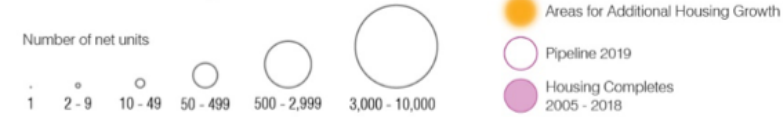
# Where could housing be added?



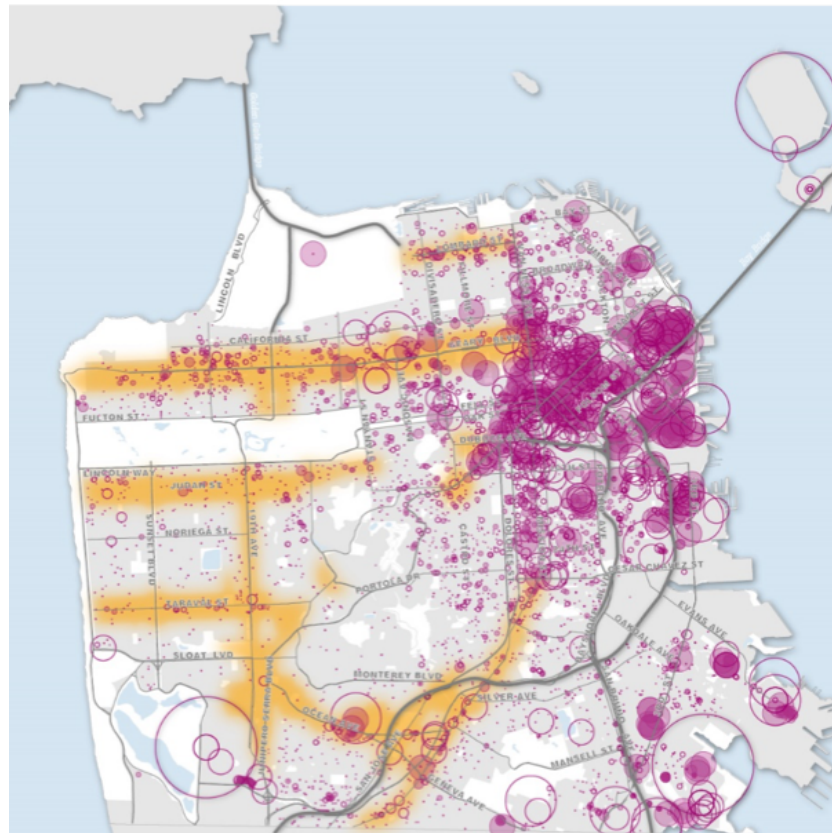
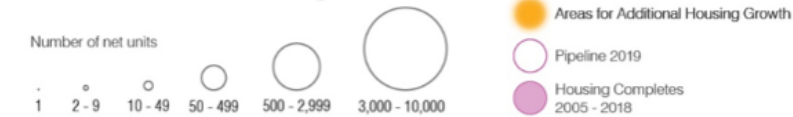
- Explored different land use concepts for future housing
- Examined what buildings and neighborhoods would be like
- Looked a feasibility of development by location and building type
- High construction costs as well as fees and process are barriers to production

# Three housing development concepts

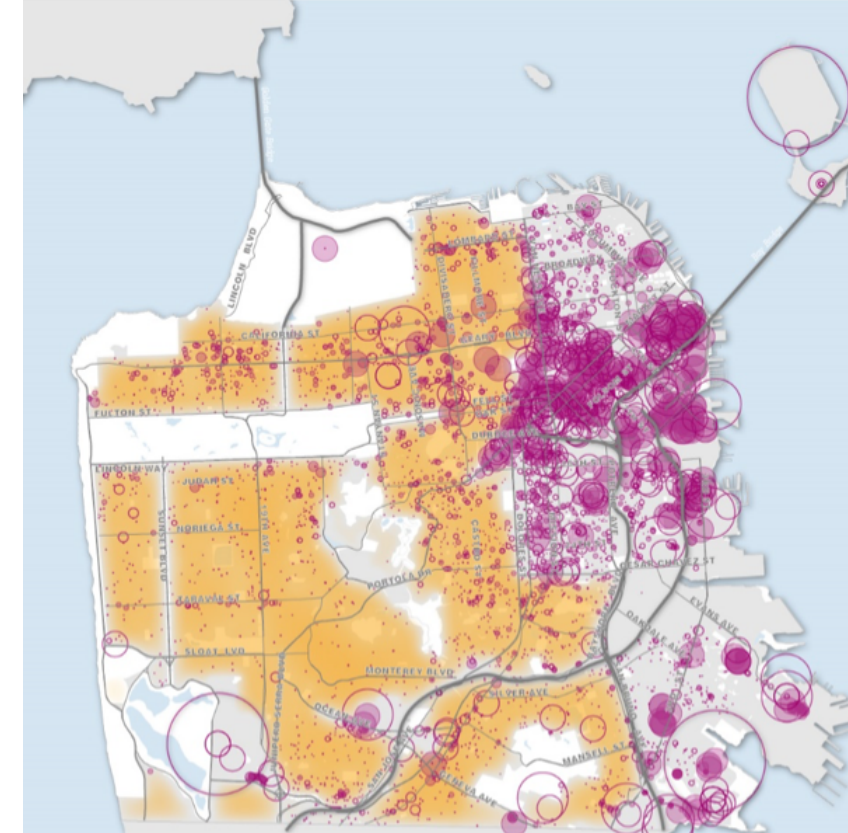
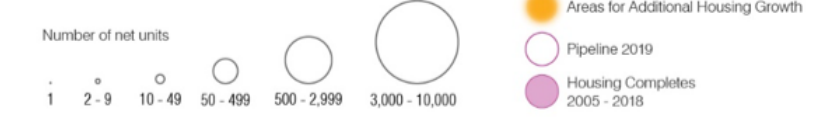
## East Side Concept



## Transit Corridors Concept

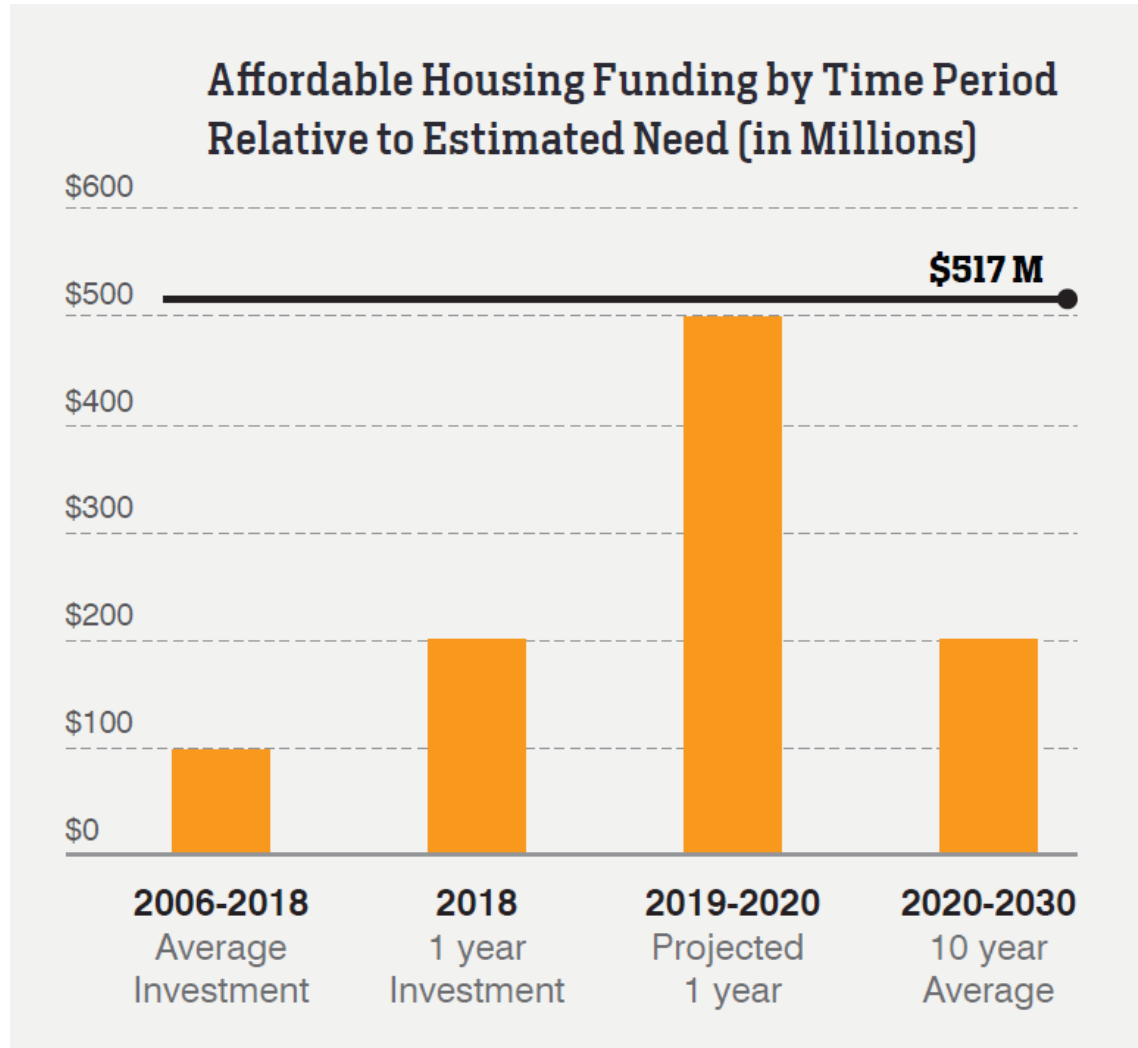


## Residential Growth Concept





# How will we fund affordable homes?



- Estimates funding needed to meet targets
- We were nearly there in 2019-2020 but will need more funding in the future
- We will need additional funding for homelessness services, supportive housing, and stabilization programs

# Summary of Key Affordability Policy Areas

Based on analysis and feedback the HAS identified four key policy areas:

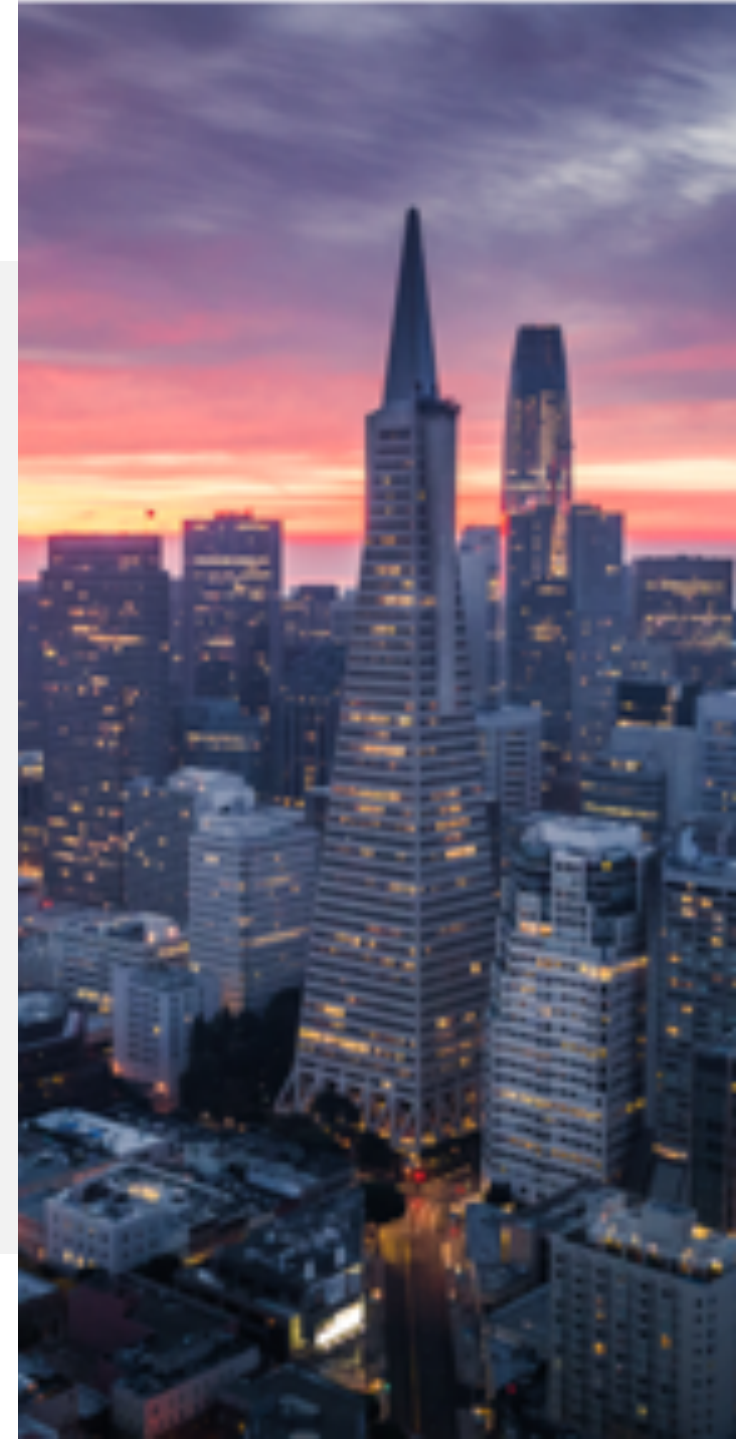
1. Increase housing development potential with a focus on equity
2. Sustain and expand affordable housing funding
3. Help lower construction costs and streamline approvals and permitting to lower development costs
4. Protect vulnerable residents, stabilize housing, and continue homelessness services expansion



# Economic Recovery and Housing

The City is convening agency heads and leaders in nonprofit, business, and philanthropy in an economic recovery task force:

- Developing recovery strategies over summer 2020
- Covers housing, commercial districts, businesses, jobs, vulnerable populations, and other needs
- Opportunity to pursue solutions for immediate and longer-term challenges
- Focus on improving racial and social equity including immediate impacts and long-standing equity issues

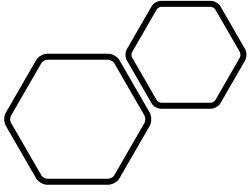


# Potential Housing Recovery Strategies

In collaboration with City agencies and consultants, Planning has identified four areas of potential strategies:

- Avoid a longer-term eviction, debt, and foreclosure crisis
- Continue to increase shelter capacity and prevent an influx of households entering homelessness
- Ensure the city continues to build new housing
- Increase and leverage public investment to preserve existing housing and lock in affordability for the future





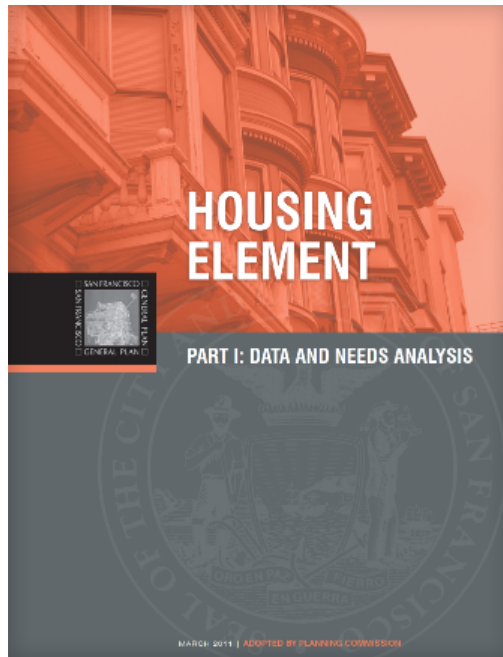
# Plan

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# The Housing Element

Long-range housing goals and policies included in the General Plan



*Required by State Law*



*Updated every eight years*



*Responds to Regional Housing Needs Allocation*

## Policies and Program Requirements:

1. Address and remove constraints
2. Assist in development of housing
3. Identify adequate sites
4. Improve and conserve existing housing stock
5. Preserve units at-risk of conversion
6. Provide equal housing opportunities
7. Environmental justice

# Housing Element 2022 Major Components

*Incorporate changes to policies to reflect*

*Racial and social equity*



*Minimum displacement*

*Housing choice for all, in all neighborhoods*



*Neighborhoods resilient to climate and health crises*

*Develop an Environmental Impact Report*



*In compliance with state and local law*



*Comprehensively analyze environmental impacts of the element, including growth*

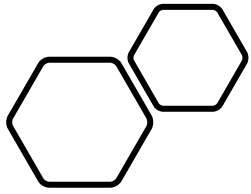
*Housing Needs and Data Analysis*

*Analysis of current and future housing needs as well as housing development sites and impediments to housing*

# Planning Process: Three rounds of outreach








# Housing Data and Strategies' Tasks Today

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- **Address racial and social equity**
- **Strengthen community engagement**
- **Reorganize data and analysis reports to improve access**
- **Develop recovery strategies to confront crisis**
- **Consider major revisions to Housing Element**

An aerial, black and white photograph of the San Francisco skyline. The Transamerica Pyramid is the central focus, surrounded by other skyscrapers. The city extends to the water's edge, with hills visible in the background. The text is overlaid in the center of the image.

**How to reframe the data  
and strategies reports to address  
our current crises and best  
inform our plans and policies?**

