

File No. 150317

Committee Item No. _____

Board Item No. 27

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee _____

Date _____

Board of Supervisors Meeting

Date March 31, 2015

Cmte Board

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|--------------------------|-------------------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Motion |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Resolution |
| <input type="checkbox"/> | <input type="checkbox"/> | Ordinance |
| <input type="checkbox"/> | <input type="checkbox"/> | Legislative Digest |
| <input type="checkbox"/> | <input type="checkbox"/> | Budget Analyst Report |
| <input type="checkbox"/> | <input type="checkbox"/> | Legislative Analyst Report |
| <input type="checkbox"/> | <input type="checkbox"/> | Introduction Form (for hearings) |
| <input type="checkbox"/> | <input type="checkbox"/> | Department/Agency Cover Letter and/or Report |
| <input type="checkbox"/> | <input type="checkbox"/> | MOU |
| <input type="checkbox"/> | <input type="checkbox"/> | Grant Information Form |
| <input type="checkbox"/> | <input type="checkbox"/> | Grant Budget |
| <input type="checkbox"/> | <input type="checkbox"/> | Subcontract Budget |
| <input type="checkbox"/> | <input type="checkbox"/> | Contract/Agreement |
| <input type="checkbox"/> | <input type="checkbox"/> | Award Letter |
| <input type="checkbox"/> | <input type="checkbox"/> | Application |
| <input type="checkbox"/> | <input type="checkbox"/> | Public Correspondence |

OTHER (Use back side if additional space is needed)

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|--------------------------|-------------------------------------|---------------------------|
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <u>Senate Bill 364</u> |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <u>Ellis Act Findings</u> |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <u>Ellis Act Report</u> |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | <u>Pipeline Report</u> |

Completed by: Joy Lamug

Date March 26, 2015

Completed by: _____

Date _____

An asterisked item represents the cover sheet to a document that exceeds 20 pages. The complete document is in the file.

1 [Supporting Senate Bill 364 (Leno) - Amendments to State Law to Return Local
2 Control Over the Ellis Act]

3 **Resolution supporting California Senate Bill 364, introduced by Senator Leno,**
4 **amending State law to return local control over the Ellis Act to prevent real estate**
5 **speculation and abuse of no-fault evictions.**

6
7 WHEREAS, The City and County of San Francisco (the "City") has historically been
8 among the cities with the highest average rent in our country; and

9 WHEREAS, The City has seen significant job creation and employment growth in the
10 past three years, seeing unemployment rates decline from 9.7% in August 2010 to 3.8% in
11 December 2014 with 70,252 more people employed; and

12 WHEREAS, The population of the City has continued to increase during the past three
13 years of economic growth, resulting in an increased demand for housing; and

14 WHEREAS, From 1997 to the present, according to data from the Rent Board, 3,277
15 units in San Francisco have been withdrawn from the rental market as a result of the Ellis Act;
16 and

17 WHEREAS, The Ellis Act, Government Code, Sections 7060, et seq., provides, with
18 limited exceptions that no public entity shall, by statute, ordinance, regulation, or by
19 administrative action compel the owner of any residential real property to offer, or to continue
20 to offer, accommodations in the property for rent or lease; and

21 WHEREAS, The Ellis Act is increasingly being used, not by long-term owners of rental
22 property as the law intended, but instead by new owners who purchase the building with the
23 intent of evoking the Ellis Act purely for speculative purposes; and

1 WHEREAS, The Ellis Act has adversely affected the supply of rental housing in San
2 Francisco by restricting its availability without granting municipalities the tools to directly deal
3 with its negative consequences; and

4 WHEREAS, There is a trend emerging in which the Ellis Act is used by entities who
5 buy rental residential buildings and repeatedly leave the rental business, exploiting a loophole
6 in the Ellis Act that the Legislature may not have intended to create when it passed the law;
7 and

8 WHEREAS, Speculators who use the Ellis Act to evict tenants typically target long term
9 residents who tend to be seniors and impact the City's most vulnerable residents: the
10 disabled, those living with disabling HIV or AIDS, and immigrants; and

11 WHEREAS, An unintended consequence of the Ellis Act is that it places dependence
12 for unit-by-unit replacement of lost affordable rental supply on local subsidy or market rate
13 developers; and

14 WHEREAS, In the last decade, while San Francisco's market rate developers, through
15 the City's inclusionary housing program, have produced 1,530 new affordable units without a
16 City subsidy, during the same period, the City has witnessed 1,594 eviction notices based on
17 the Ellis Act – creating a net loss in non-City-subsidized affordable rental housing; and

18 WHEREAS, In the last decade, while San Francisco has produced on average 591
19 new locally subsidized affordable housing units each year, 262 affordable rental units on
20 average have been petitioned to be withdrawn from the rental market each year due to the
21 Ellis Act, diminishing the impact that City-subsidized affordable housing production has had
22 on increasing San Francisco's affordable housing, particularly for seniors and working class
23 households; and

24 WHEREAS, Although there are 50,600 units entitled for development in the Planning
25 Department's most recent pipeline report, 6,700 of which are currently under construction,

1 with 35 percent currently qualifying as permanently affordable housing, the use of the Ellis Act
2 has in the past three years increased 165%, with 215 evictions from March 2013 to February
3 2014; and

4 WHEREAS, The City does not want to continue the trend of trying to build more
5 affordable housing while at the same time losing an increasing number of our affordable rental
6 housing to Ellis Act evictions; and

7 WHEREAS, The threat of Ellis Act eviction can force tenants to accept buyouts rather
8 than face an eviction without compensation, which causes underreporting of de facto Ellis Act
9 evictions; and

10 WHEREAS, The City recognizes that we cannot wait until Ellis Act evictions reach the
11 levels seen in the year 2000 before acting to restore more local control; and

12 WHEREAS, A 2014 report from Tenants Together, a statewide organization for renters'
13 rights, found that 51% of the City's evictions begin within the first year of new ownership and
14 78% start within the first five years of new ownership; and

15 WHEREAS, Thirty percent of all Ellis Act evictions come from investors who have
16 entered and exited the rental business more than once, evicting residents from multiple
17 buildings; and

18 WHEREAS, The City should work to stem the tide of speculative evictions; and

19 WHEREAS, The City should protect residents who live in the housing stock we have
20 while continuing to build the housing our growing workforce needs; now, therefore, be it

21 RESOLVED, That the Board of Supervisors and Mayor should work together with a
22 common goal to amend state law to restrict speculative Ellis Act evictions and return greater
23 local control over the Ellis Act in order to reduce the speculative Ellis Act evictions that are
24 displacing long-time residents of our City and disrupting our efforts to grow in accordance to
25 our General Plan and our neighborhood plans; and, be it

1 FURTHER RESOLVED, That the Board of Supervisors strongly supports Senate Bill
2 364 amending state law to return more local control to San Francisco in order to stop
3 speculative Ellis Act evictions and respectfully urge our Bay Area legislators to support said
4 legislation; and, be it

5 FURTHER RESOLVED, That the Board of Supervisors and Mayor will also pursue
6 local strategies to mitigate adverse impacts on persons displaced by the Ellis Act including but
7 not limited to legislation related to relocation assistance, buy-outs, tenant harassment and
8 affordable rental housing retention.

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Introduced by Senator Leno
(Principal coauthor: Assembly Member Chiu)

February 24, 2015

An act to add Section 7060.8 to the Government Code, relating to residential real property.

LEGISLATIVE COUNSEL'S DIGEST

SB 364, as introduced, Leno. Residential real property: withdrawal of accommodations.

Existing law, commonly known as the Ellis Act, generally prohibits public entities from adopting any statute, ordinance, or regulation, or taking any administrative action, to compel the owner of residential real property to offer or to continue to offer accommodations, as defined, in the property for rent or lease.

This bill would authorize the City and County of San Francisco to prohibit an owner of accommodations from filing a notice of an intent to withdraw accommodations or prosecuting an action to recover possession of accommodations, or threatening these actions, unless all the owners of the accommodations have been owners of record for 5 continuous years or more, except as specified, or with respect to property that the owner acquired within 10 years after providing notice of an intent to withdraw accommodations at a different property. The bill would also permit the city and county to require an owner of accommodations notifying the city and county of an intention to withdraw accommodations from rent or lease to identify each person or entity with an ownership interest in the accommodations and to identify all persons or entities with an ownership interest in an entity. This information would be available for public inspection. The bill

would provide specified, nonexclusive remedies that the city and county would be authorized to impose for a violation of these provisions.

This bill would make legislative findings and declarations as to the necessity of a special statute for the City and County of San Francisco.

Vote: majority. Appropriation: no. Fiscal committee: no.
State-mandated local program: no.

The people of the State of California do enact as follows:

1 SECTION 1. Section 7060.8 is added to the Government Code,
2 to read:

3 7060.8. (a) This section shall apply only to a city that is also
4 a county.

5 (b) Notwithstanding any other provision of this chapter, the city
6 and county by ordinance or ballot measure may provide that:

7 (1) An owner of accommodations shall not file a notice with a
8 public entity of an intent to withdraw accommodations pursuant
9 to this chapter, prosecute an action to recover possession of
10 accommodations pursuant to this chapter, or threaten to do either
11 of these things, unless all the owners of the accommodations have
12 been owners of record for five continuous years or more. If an
13 owner of record is not a natural person, then all persons or entities
14 with an ownership interest in that entity shall have held that interest
15 for five continuous years. The five-year ownership requirement
16 in this paragraph shall not apply to an owner of accommodations
17 who is a natural person, who owns no more than two properties,
18 and who owns no more than a total of four residential units.

19 (2) If an owner of accommodations files a notice of intent with
20 the public entity to withdraw accommodations under this chapter,
21 and the owner subsequently acquires a new property containing
22 accommodations within 10 years of that filing, the owner shall not
23 withdraw accommodations pursuant to this chapter, prosecute an
24 action to recover possession of accommodations pursuant to this
25 chapter, or threaten to do either of these things, with respect to the
26 later acquired property. For purposes of this paragraph, an owner
27 of accommodations includes any person or entity with an
28 ownership interest in an entity that owns the accommodations.

29 (3) An owner of accommodations, or any person or entity with
30 an ownership interest in an entity that owns the accommodations,
31 shall not act in concert with a coowner, successor owner,

1 prospective owner, agent, employee, or assignee, to circumvent
2 the limitations of paragraph (1) or (2):

3 (4) An owner of accommodations notifying the city and county
4 of an intention to withdraw accommodations from rent or lease
5 shall identify each person or entity with an ownership interest in
6 the accommodations, and if any entity is not a natural person,
7 identify all persons or entities with an ownership interest in that
8 entity. This information shall not be confidential and shall be
9 available for public inspection.

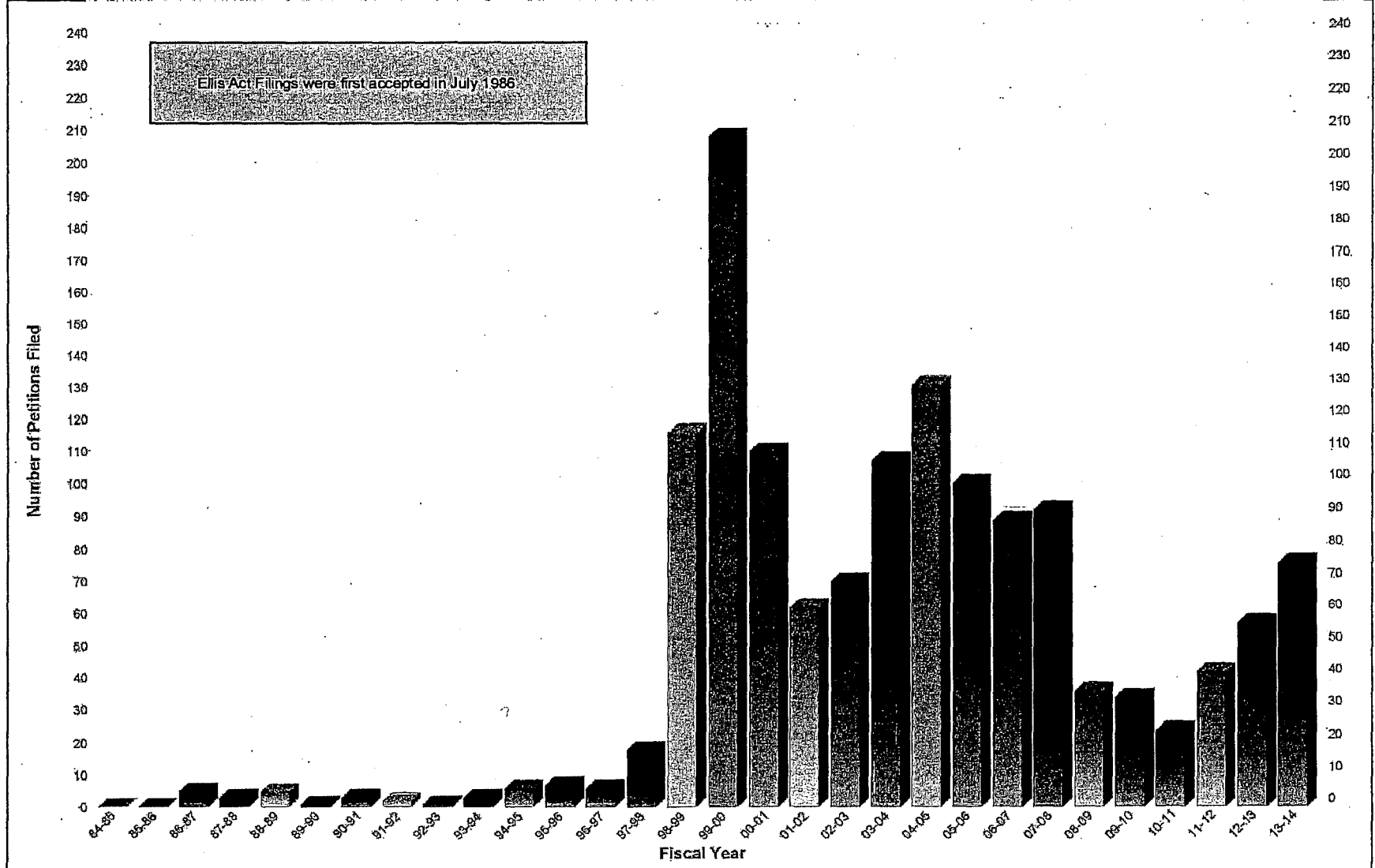
10 (c) The city and county may provide that a person or entity that
11 violates the provisions described in subdivision (b) is liable to the
12 tenant or lessee for actual damages, special damages of not less
13 than two thousand dollars (\$2,000) for each violation, and
14 reasonable attorney fees and costs in an amount fixed by the court.
15 The remedy provided by this section is not exclusive and shall not
16 preclude either the tenant or lessee from pursuing any other remedy
17 provided by law.

18 SEC. 2. The Legislature finds and declares that a special law
19 is necessary and that a general law cannot be made applicable
20 within the meaning of Section 16 of Article IV of the California
21 Constitution because of the recent significant increase in the
22 evictions under the Ellis Act in the City and County of San
23 Francisco and the consequent displacement of long-time residents
24 and severe reduction of availability of affordable rental housing
25 in San Francisco.

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Landlord Ellis Act Filings • 30-Year Trend

Fiscal Year	84-85	85-86	86-87	87-88	88-89	89-90	90-91	91-92	92-93	93-94	94-95	95-96	96-97	97-98	98-99	99-00	00-01	01-02	02-03	03-04	04-05	05-06	06-07	07-08	08-09	09-10	10-11	11-12	12-13	13-14
Petitions	0	0	5	3	5	1	3	2	1	3	6	7	6	18	116	208	110	62	70	107	131	100	89	92	36	34	24	42	57	76
Units	0	0	5	6	93	1	25	10	1	20	85	27	10	61	291	879	281	188	233	352	480	454	330	393	165	108	72	121	192	304



Eviction Notices by Just Cause Reason • 30-Year Trend

	84-85	85-86	86-87	87-88	88-89	89-90	90-91	91-92	92-93	93-94	94-95	95-96	96-97	97-98	98-99
Non-payment of Rent				130	175	107	123	137	96	101	133	125	132	142	143
Habitual Late Payment of Rent				80	53	88	88	60	72	50	40	49	85	100	101
Breach of Lease Agreement				9	90	204	183	158	136	133	104	172	290	327	344
Nuisance				185	207	231	227	205	215	159	204	296	247	258	247
Illegal Use of Unit				0	6	16	9	11	11	15	9	53	16	17	24
Failure to Sign Lease Renewal				71	21	18	17	114	3	0	0	0	0	2	4
Denial of Access to Unit				5	11	8	12	13	8	5	11	1	0	18	12
Unapproved Subtenant				40	28	74	96	40	34	12	25	34	67	90	168
Owner/Relative Move-In				522	584	545	489	358	293	344	361	481	1,075	1,410	1,200
Condo Conversion							1	0	0	0	0	1	1	1	0
Demolition				0	4	14	13	13	12	12	33	36	53	77	39
Capital Improvement				76	149	47	30	30	10	33	8	18	53	44	24
Substantial Rehabilitation				67	114	16	13	13	1	4	7	10	38	35	28
Ellis Act Withdrawal				28	18	3	4	4	0	0	0	0	3	12	208
Roommate Living in Same Unit				7	15	24	38	38	10	20	30	49	71	119	104
Lead Remediation				80	0	0	0	0	0	0	0	0	0	0	0
Other					82	67	57	57	73	77	104	103	160	194	90
Development Agreement															
Good Samaritan Tenancy Ends															
TOTAL:				1,298	1,637	1,472	1,380	1,249	974	965	1,069	1,368	2,291	2,846	2,732

	99-00	00-01	01-02	02-03	03-04	04-05	05-06	06-07	07-08	08-09	09-10	10-11	11-12	12-13	13-14
Non-payment of Rent	150	111	109	89	114	86	103	99	98	129	85	106	73	74	116
Habitual Late Payment of Rent	93	86	57	65	62	49	60	72	88	88	60	42	59	70	78
Breach of Lease Agreement	327	398	329	236	274	246	271	294	424	376	457	428	536	510	646
Nuisance	278	256	283	247	285	274	310	310	317	279	308	261	277	350	359
Illegal Use of Unit	32	27	41	18	25	21	49	39	39	31	40	21	29	53	52
Failure to Sign Lease Renewal	6	2	2	1	0	0	0	1	9	4	11	4	7	11	1
Denial of Access to Unit	14	9	6	9	4	5	11	15	20	14	31	19	20	14	8
Unapproved Subtenant	84	30	4	13	11	15	19	24	13	18	19	15	22	21	14
Owner/Relative Move-In	937	991	594	422	384	288	248	210	161	143	127	139	136	234	307
Condo Conversion	6	5	5	7	3	7	1	4	2	3	2	3	6	10	13
Demolition	43	84	88	94	73	68	48	47	39	29	24	37	42	62	112
Capital Improvement	80	58	47	64	69	70	83	58	58	24	21	27	39	38	34
Substantial Rehabilitation	14	7	8	2	0	1	5	0	0	0	0	1	0	6	0
Ellis Act Withdrawal	440	274	83	115	228	330	248	210	265	99	69	40	81	144	215
Roommate Living in Same Unit	146	130	94	73	57	49	39	42	19	30	30	32	32	40	55
Lead Remediation	1	1	0	0	0	7	0	1	2	3	0	0	0	0	0
Other	110	69	37	31	30	40	41	49	48	45	68	47	62	66	54
Development Agreement												106	0	232	0
Good Samaritan Tenancy Ends												0	0	1	0
TOTAL:	2,761	2,538	1,787	1,486	1,599	1,554	1,536	1,475	1,600	1,315	1,372	1,328	1,421	1,934	2,064





Residential Rent Stabilization and Arbitration Board
City & County Of San Francisco

113 -- Ellis Act Withdrawal Eviction Notices by Zip Code

3/1/2014 Through 2/28/2015

Zip Code	Total
94103	12
94107	5
94109	4
94110	41
94112	3
94114	8
94115	2
94116	1
94117	3
94118	1
94121	19
94122	6
94123	3
94131	1
94134	4
Total	113



Residential Rent Stabilization and Arbitration Board
City & County Of San Francisco

219 -- Ellis Act Withdrawal Eviction Notices by Zip Code

3/1/2013 Through 2/28/2014

Zip Code	Total
94102	5
94103	14
94107	2
94108	18
94109	17
94110	68
94112	7
94114	19
94116	7
94117	6
94118	3
94121	1
94122	21
94123	7
94131	2
94133	22
Total	219



Residential Rent Stabilization and Arbitration Board
City & County Of San Francisco

116 -- Ellis Act Withdrawal Eviction Notices by Zip Code

3/1/2012 Through 2/28/2013

Zip Code	Total
94103	11
94107	1
94108	2
94109	18
94110	26
94112	3
94114	7
94115	4
94117	4
94118	7
94121	3
94122	12
94123	4
94131	1
94132	1
94133	11
94134	1
Total	116



Residential Rent Stabilization and Arbitration Board
City & County Of San Francisco

64 -- Ellis Act Withdrawal Eviction Notices by Zip Code

3/1/2011 Through 2/29/2012

Zip Code	Total
94107	5
94109	16
94110	21
94112	1
94114	5
94115	2
94117	2
94118	2
94121	5
94122	1
94123	1
94127	1
94131	1
94134	1
Total	64



Residential Rent Stabilization and Arbitration Board
City & County Of San Francisco

61 -- Ellis Act Withdrawal Eviction Notices by Zip Code

3/1/2010 Through 2/28/2011

Zip Code	Total
941	1
94109	2
94110	13
94112	5
94114	1
94115	8
94116	1
94117	1
94121	1
94122	4
94123	5
94127	1
94131	10
94133	8
Total	61



Residential Rent Stabilization and Arbitration Board
City & County Of San Francisco

43 -- Ellis Act Withdrawal Eviction Notices by Zip Code

3/1/2009 Through 2/28/2010

Zip Code	Total
94107	2
94109	3
94110	6
94112	1
94116	1
94118	10
94121	8
94122	1
94131	7
94133	4
Total	43



Residential Rent Stabilization and Arbitration Board
City & County Of San Francisco

192 -- Ellis Act Withdrawal Eviction Notices by Zip Code

3/1/2008 Through 2/28/2009

Zip Code	Total
941	1
94102	8
94103	12
94107	6
94109	7
94110	5
94112	14
94114	30
94115	10
94117	22
94118	19
94121	24
94122	10
94131	10
94133	14
Total	192



Residential Rent Stabilization and Arbitration Board
City & County Of San Francisco

252 -- Ellis Act Withdrawal Eviction Notices by Zip Code

3/1/2007 Through 2/28/2008

Zip Code	Total
941	4
94103	10
94107	2
94108	1
94109	36
94110	24
94112	2
94114	32
94115	2
94116	2
94117	40
94118	28
94121	4
94122	18
94124	2
94131	8
94133	36
94134	1
Total	252



Residential Rent Stabilization and Arbitration Board
City & County Of San Francisco

246 -- Ellis Act Withdrawal Eviction Notices by Zip Code

3/1/2006 Through 2/28/2007

Zip Code	Total
941	4
94103	12
94109	31
94110	47
94114	37
94115	16
94116	1
94117	17
94118	21
94121	7
94122	12
94123	6
94124	4
94131	1
94133	30
Total	246



Residential Rent Stabilization and Arbitration Board
City & County Of San Francisco

276 -- Ellis Act Withdrawal Eviction Notices by Zip Code

3/1/2005 Through 2/28/2006

Zip Code	Total
94102	3
94103	24
94107	1
94108	5
94109	32
94110	52
94112	4
94114	22
94115	14
94116	4
94117	38
94118	23
94121	13
94122	9
94127	1
94131	14
94133	17
Total	276



**Residential Rent Stabilization and Arbitration Board
City & County Of San Francisco**

Annual Eviction Notice Report

1/1/2005 Through 12/31/2014

→ last 10 calendar years

Cause For Eviction	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Total
Non-payment of Rent	84	86	79	75	87	83	92	81	87	75	79	95	1003
Habitual Late Payment of Rent	66	50	50	53	63	60	67	39	47	47	60	65	667
Breach of Lease Agreement	326	379	361	413	398	520	434	467	321	279	296	298	4492
Nuisance	283	255	296	268	277	280	253	297	244	208	248	262	3171
Illegal Use of Unit	45	30	37	32	45	48	13	53	32	30	22	36	423
Failure to Sign Lease Renewal	5	3	3	6	7	4	3	1	3	1	7	8	51
Denial of Access to Unit	19	16	12	11	15	9	7	23	10	21	15	8	166
Unapproved Subtenant	21	11	13	19	13	17	13	21	19	13	13	10	183
Owner Move In	157	205	198	193	200	183	183	144	114	137	140	128	1982
Condo Conversion	3	4	4	6	3	6	1	8	3	5	1	5	49
Demolition	40	41	39	33	43	36	31	94	48	27	43	30	505
Capital Improvement	28	48	45	16	23	30	27	38	39	58	53	38	443
Substantial Rehabilitation	7	4	0	0	0	0	0	0	0	0	0	1	12
Ellis Act Withdrawal	125	116	238	144	117	145	109	117	89	179	82	133	1594
Lead Remediation	1	1	1	0	1	0	1	0	0	0	1	0	6
Development Agreement	0	0	0	0	0	232	106	0	0	0	0	0	338
Good Samaritan Tenancy Ends	0	0	0	0	0	0	0	1	0	0	0	0	1
Roommate Living in Same Unit	26	24	39	31	25	29	24	37	30	31	33	42	371
Other	40	40	45	41	50	36	47	68	32	42	52	52	545
Total	1,276	1,313	1,460	1,341	1,367	1,718	1,411	1,489	1,118	1,153	1,145	1,211	16002

1369



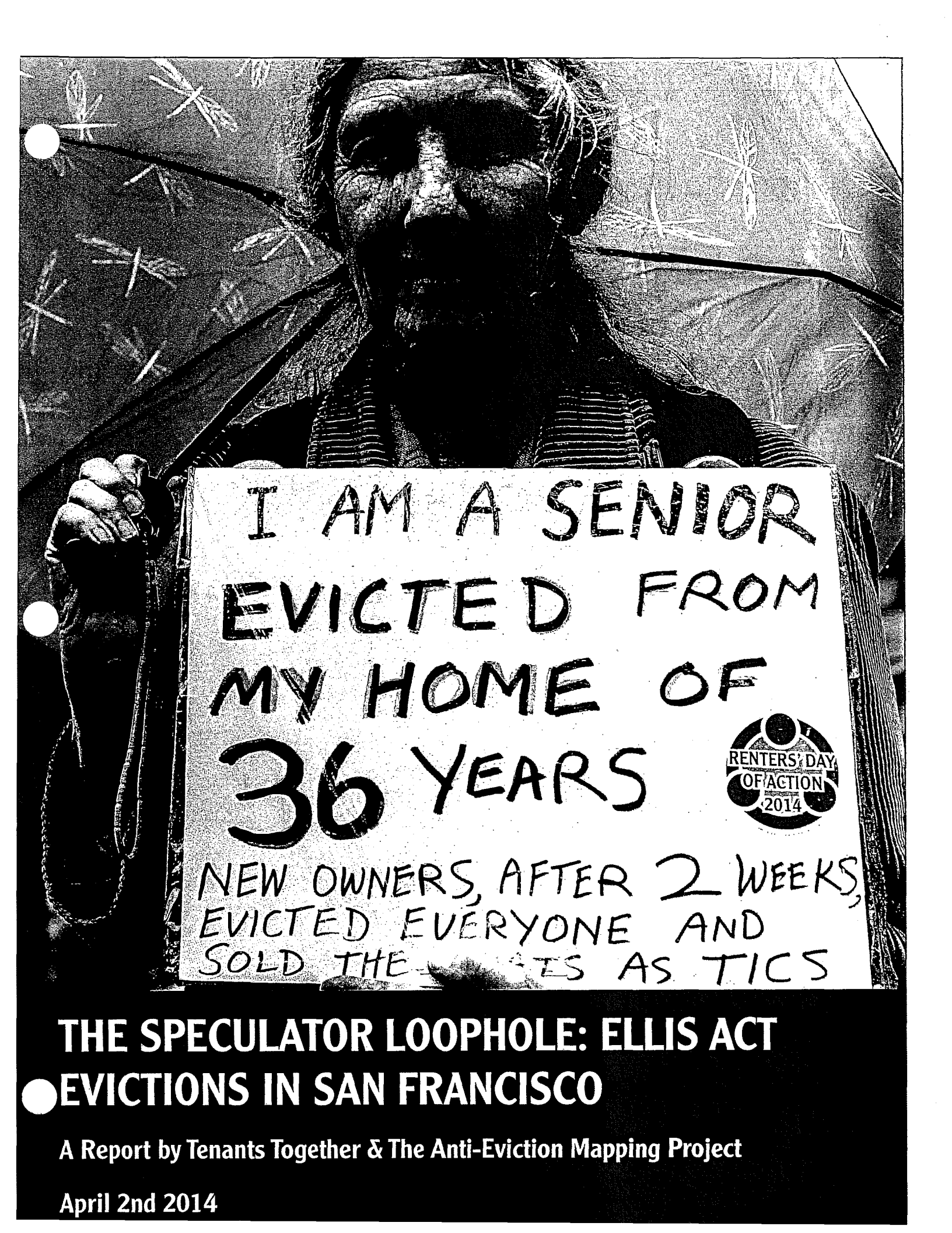
**Residential Rent Stabilization and Arbitration Board
City & County Of San Francisco**

Annual Eviction Notice Report

1/1/2004 Through 12/31/2013 → last 10 calendar years

Cause For Eviction	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Total
Non-payment of Rent	77	78	74	71	83	83	87	70	77	73	77	95	945
Habitual Late Payment of Rent	61	48	54	53	62	64	64	36	52	45	59	57	655
Breach of Lease Agreement	290	330	331	381	354	451	383	413	283	233	274	255	3978
Nuisance	272	236	281	270	260	260	224	281	226	189	249	257	3005
Illegal Use of Unit	39	23	32	33	39	35	10	43	28	17	21	31	351
Failure to Sign Lease Renewal	5	3	3	6	7	3	3	1	2	0	7	8	48
Denial of Access to Unit	19	16	11	10	14	7	6	23	9	17	15	8	155
Unapproved Subtenant	19	12	14	19	13	18	13	20	17	12	12	11	180
Owner Move In	161	198	183	196	205	183	187	157	112	133	154	140	2009
Condo Conversion	3	4	1	6	9	6	1	6	3	3	1	4	47
Demolition	49	45	41	34	47	32	30	96	48	27	46	29	524
Capital Improvement	27	42	49	17	25	28	28	38	35	66	52	42	449
Substantial Rehabilitation	7	4	0	0	0	0	0	0	0	0	0	1	12
Ellis Act Withdrawal	130	126	268	152	139	174	144	135	105	171	112	139	1795
Lead Remediation	1	1	1	0	1	0	1	0	0	0	1	0	6
Development Agreement	0	0	0	0	0	232	106	0	0	0	0	0	338
Good Samaritan Tenancy Ends	0	0	0	0	0	0	0	1	0	0	0	0	1
Roommate Living in Same Unit	29	23	38	35	27	32	29	35	29	28	30	36	371
Other	41	37	43	44	46	36	46	71	32	43	44	47	530
Total	1,230	1,226	1,424	1,327	1,331	1,644	1,362	1,426	1,058	1,057	1,154	1,160	15399

1364



I AM A SENIOR
EVICTED FROM
MY HOME OF
36 YEARS



NEW OWNERS, AFTER 2 WEEKS,
EVICTED EVERYONE AND
SOLD THE APARTMENTS AS TICs

THE SPECULATOR LOOPHOLE: ELLIS ACT EVICTIONS IN SAN FRANCISCO

A Report by Tenants Together & The Anti-Eviction Mapping Project

April 2nd 2014

ACKNOWLEDGMENTS



**TENANTS
TOGETHER**

ANTI-EVICTION MAPPING PROJECT



Dean Preston, Executive Director of Tenants Together, authored this report. Dean is an attorney and a leading expert on the Ellis Act. Tenants Together is a nonprofit organization dedicated to defending and advancing the rights of California tenants to safe, decent, and affordable housing. Tenants Together is California's only statewide renters' rights organization.

Tenants Together collaborated with the Anti-Eviction Mapping Project to prepare this report. The Anti-Eviction Mapping Project has been at the forefront of collecting, analyzing and presenting data on Ellis Act evictions in San Francisco. TT wishes to acknowledge and thank Erin McElroy and Jennifer Fieber of the Anti-Eviction Mapping Project for their extraordinary work on data and visualizations for this report, Aimee Inglis of Tenants Together for graphic design, and Sasha Ellis of Tenants Together for research assistance.

The report is available, with additional visualizations, online at www.tenants-together.org/ellisreport

Cover photo: Harvey Castro, Studio369 Photography

KEY FINDINGS:

- The Ellis Act and its legislative history reveal that the purpose of the Act was to allow landlords, not speculators, to exit the rental housing business
- 3,610 units have been removed from the rental market in San Francisco under the Ellis Act (1997-2013).
- At least 10,000 San Francisco tenants have been displaced through the Ellis Act.
- 51% of the Ellis Act evictions were commenced by owners within the first year of their ownership of the property. The majority of those were during the first six months of ownership.
- 78% of Ellis Act evictions are commenced by owners within their first five years of ownership of the property.
- 30% of units are Ellis'd by known serial evictors, meaning they have used the Ellis Act to evict tenants in other properties. Many of these investors have entered, exited, re-entered, and re-exited the rental business, evicting tenants from multiple buildings.

EXECUTIVE SUMMARY

California's Ellis Act was adopted by the Legislature to provide landlords a statutory right to exit the rental housing business after a California Supreme Court decision denied a landlord's claim to a constitutional right to exit the rental business. At the time, proponents framed the Ellis Act as a last resort for long-term landlords in rent control jurisdictions that no longer wanted to endure the alleged personal or psychological demands of being a landlord.

For ten years after the Act was enacted, Ellis Act evictions were rare. In fact, the Ellis Act was largely irrelevant until the late 1990s when property owners in San Francisco began using the Ellis Act to evict tenants. Ellis Act evictions peaked in 2001-2003, but remained high until the housing market crashed in 2008. After several years of lower eviction rates, Ellis Act evictions rose sharply in 2012 and 2013 in San Francisco, prompting recent protests and media attention.

This report has three primary objectives: first, to examine whether the current rise in Ellis Act evictions is consistent with the purposes of the Act; second, to quantify how the Act is being used and analyze trends; and third, to outline policy proposals that would limit any misuse of the Act. To complete the report, Tenants Together analyzed the complete legislative history of the Ellis Act, San Francisco Rent Board data and reports, property records, and corporate filings.

The data reveals extensive displacement due to the Ellis Act, with most evictions by recent purchasers, and a disturbing number by serial evictors.

This report recommends two reforms to ensure that use of the Ellis Act is confined to long-term landlords, not real estate speculators who get into the rental business just to get out of it. The Act should not be available to new owners of property or to owners that have previously exited and reentered the rental business. These two changes would help limit use of the Ellis Act to its intended beneficiaries: landlords, not speculators.



PART I: INTENT OF THE ELLIS ACT

The Ellis Act¹ was adopted in response to the California Supreme Court's decision in *Nash v. City of Santa Monica* (1984) 37 Cal. 3d 97. In *Nash*, a landlord argued that the city's requirement that he obtain a removal permit in order to demolish his building was unconstitutional. The Supreme Court disagreed. The Court rejected the argument that a property owner has a constitutional right to exit the rental housing business.

The next year, Senator Jim Ellis (R-San Diego) introduced SB 505, which was eventually signed into law. The Act provides that no public entity shall "compel the owner of any residential real property to offer, or to continue to offer, accommodations in the property for rent or lease." The Act expressly states: "It is the intent of the Legislature in enacting this chapter to supersede any holding or portion of any holding in *Nash v. City of Santa Monica*, 37 Cal.3d 97 to the extent that the holding, or portion of the holding, conflicts with this chapter, so as to permit landlords to go out of business."² Thus, the Ellis Act provides landlords with a statutory right to exit the rental housing business.

The Ellis Act contains certain limits. It lists local powers that it does not preempt, including the city's power to mitigate the impact on displaced persons.³ Likewise, the Act makes clear that it does not relieve a party to a lease or rental agreement of any obligations under that agreement.⁴ The Act allows local governments with rent control systems to adopt specified protections for tenants that are set forth in the Act, such as a 120 day notice to tenants if a landlord is evicting under the Ellis Act.⁵ Finally, the Act explains that it is not intended to do certain things, including interfere with the local governments' power over land use or regulation of the conversion of existing housing units to condominiums, other subdivided interests, or nonresidential uses after withdrawal of units.⁶

The California Association of Realtors (CAR) sponsored SB 505. In its statement of support, CAR explained: "SB 505 very fundamentally and simply permits the owner to cease offering property for rent. It does not permit the owner to change the property to another use."⁷ Notwithstanding CAR's statement that the Ellis Act "does not permit the owner to change the property to another use," that is exactly how the law has been used. In San Francisco, most Ellis Act evictions are performed in order to convert the units to tenancies-in-common (TICs), a form of ownership similar to condominiums.⁸

1 California Government Code Section 7060, et seq.
2 Government Code sec. 7060.7.
3 Government Code sec. 7060.1(c).
4 Government Code sec. 7060.1(e).
5 Government Code sec. 7060.4.
6 Government Code sec. 7060.7.
7 California Association of Realtors, "SB 505 Statement of Support", August 16, 1985.
8 The ultimate fate of units removed from the rental market under the Ellis Act appears to vary by jurisdiction. In Los Angeles, for example, the Ellis Act is often used to remove tenants in advance of a building demolition.

PART II:

ELLIS ACT RESEARCH FINDINGS

For the first decade after passing, the Ellis Act was not used much in San Francisco. Ellis Act evictions really began in San Francisco in 1997. From that year through 2013, 3,610 rental units were withdrawn from the market under the Ellis Act in San Francisco.

	Buildings	Units
All Ellis Petitions Filed 1997-2013:	1308	-
Re-Files (duplicates)	57	-
Ellis Petitions (De-duplicated) 1997-2013:	1251	3610

The map shows all properties/units removed from the rental market in San Francisco under the Ellis Act from 1997 to 2013. The size of the circle on the map shows the relative number of units in the property.

Tenants Together conservatively estimates that over 10,000 tenants have been displaced from buildings with formal Ellis Act filings in San Francisco. This figure assumes an average of three tenants per household.¹ Importantly, the figure does not include buildings from which all tenants are displaced by threats of an Ellis Act eviction. Those buildings will not show up in any public record concerning Ellis Act petitions or evictions. Tenant groups estimate that for every tenant displaced by an Ellis Act eviction, there are multiple tenants displaced by Ellis Act threats. Further research is needed to determine how many tenants have been displaced in this manner. Without that data, our estimate does not capture the full extent of the displacement caused by the Ellis Act.

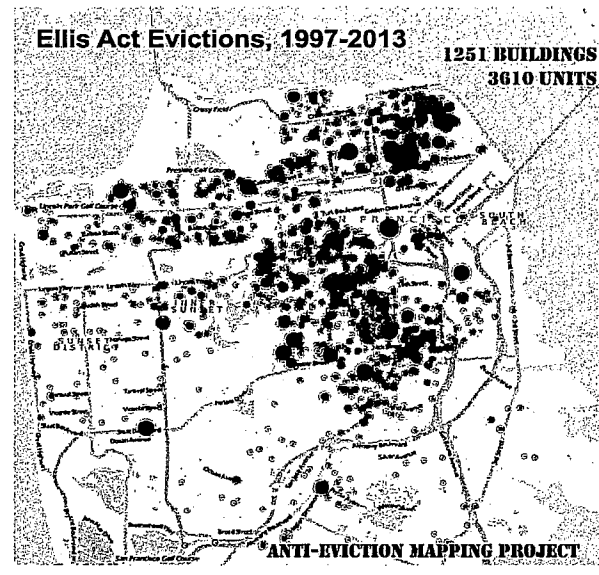
CAR's "reasons for support of SB 505" focused entirely on freeing landlords of the burdens of being in the rental housing business. According to CAR's support letter:¹

"Requiring a person to continue to offer his or her residential real property for rent is a requirement that a person (landlord) continue in a business or occupation which involves very considerable personal liability ... and a continued devotion of personal services inherent in the management of rental property including the very considerable psychological demands of the provisions of those services, as evidenced by the pressures of tenant relations, is contrary to sound public policy affecting a personal freedom which may approach or comprise involuntary servitude."

Non-landlord speculators are not referenced in CAR's reasons for support or in the Act itself. The final language of the Act confirmed that the Act sought to "permit landlords to go out of business."²

The Ellis Act was not intended to strip cities of their power to prevent speculators from converting rental housing. To the contrary, the Act states that it is not intended to "interfere with local governmental authority over land use, including regulation of the conversion of existing housing to condominiums or other subdivided interests or to other nonresidential use following its withdrawal from rent or lease under this chapter."³

These intended limits of the Act were subverted by a court case in 2003. In *Tom v. CCSF*,⁴ the Court struck down San Francisco's attempt to regulate TICs as unconstitutional.⁵ This court decision interfered with the City's ability to regulate the change of use, giving a green light to speculators in San Francisco. As a result, Ellis Act evictions for purposes of converting rental units to TICs (and eventually condominiums) have persisted despite the promises and intent of the Act.



1 California Association of Realtors, Statement of Support, August 16, 1985, page 2-3.

2 Government Code Section 7060.7

3 Government Code Section 7060.7(a)

4 *Tom v. City & County of San Francisco* (2004) 120 Cal.App.4th 674

5 The Court struck down a requirement that exclusive rights of occupancy, a key part of TIC agreements, be recorded. The law requiring such interests to be recorded would have effectively forced TICs through the condominium conversion process and the limits on conversions in San Francisco. The Court held that the requirement to record such interests was unconstitutional based on co-owners right of free association.

1 Rent Board data regarding number of occupants per units is not public and could not be obtained for this report. Ellis Act evictions typically target bigger units that are more profitable for conversion to condominiums and tenancies-in-common (TICs), while the citywide average for household size is lowered by studios, single room occupancy (SRO) units, and other smaller dwellings that are not generally Ellis Act eviction targets.

IMPACT ON SENIOR AND DISABLED TENANTS

Many of the tenants displaced under the Ellis Act are long-term tenants. Ellis Act evictions disproportionately impact senior and disabled residents. Rent Board data reviewed in preparation of this report reveals that senior/disability claims were filed in 71% of the properties withdrawn under the Ellis Act.

Tenant advocates have highlighted individual stories of very long-term senior and disabled tenants, a few of which are set forth here.

Matthew Miller bought 1506-1510 Jackson Street for \$1.2 million in January 2012. Miller had used the Ellis Act before on a different property. Within four months, he began trying to displace the longtime residents at 1506-1510 Jackson. 1508-A Jackson Street was the home for Chinese Immigrants Gum Gee Lee and her husband, 80-year-old Poon Heung Lee since 1979. They raised seven children there,

including their 48-year-old disabled daughter. As Gum Gee Lee, 73, explained, "We raised our family here and we paid rent for more than 30 years. This new landlord knew we lived here when he bought the building. But he did not plan to keep us. He started to evict all of the tenants right away." The family lives on Social Security checks and explained that it would be nearly impossible to find anything they could afford. They wanted to stay near Chinatown where there are social support services for their daughter's disability. Before being forced out, Gum Gee Lee explained, "We thought we'd live here until we passed away, And now this. It is all so sad."

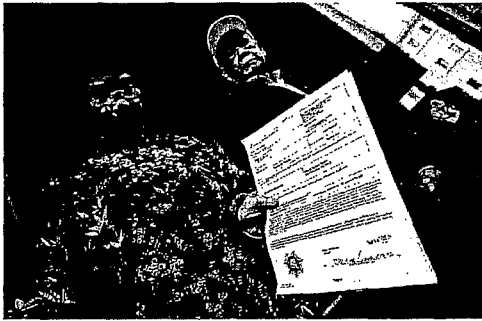
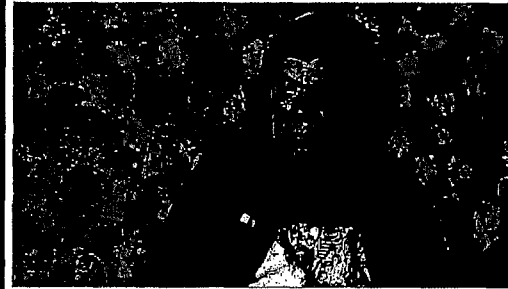


Photo by Mike Koomzin, the San Francisco Examiner

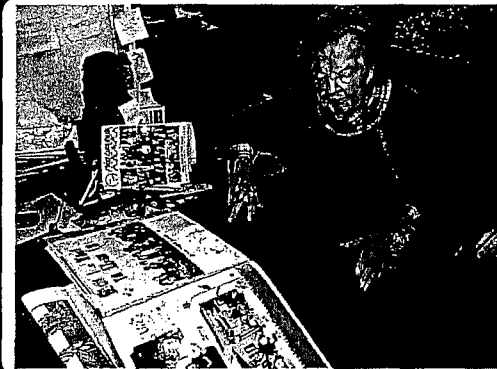


Sergio Iantorno is currently evicting the well-known artist Rene Yañez from his home of 35 years in the Mission District at 380 San Jose St. Yañez is the founder and curator of the Mission Cultural Center and Galería de la Raza, amongst other Latino arts organizations and projects. According to his son, who lives at the property, "With elderly people like them, with limited income, this essentially makes them homeless.... They were kind of at peace and mentally prepared that this would be their home when they passed away, being in the community where they've put so much into. That's the toughest thing for me: trying to find new spots for them to pass away in."

EVICIONS RISING IN SAN FRANCISCO

San Francisco experienced a sharp rise in Ellis Act evictions in 2013. The number of units rose from 66 in 2011, to 109 in 2012, and to 252 in 2013.

The rise in Ellis Act evictions appears to be driven by two forces. First, booming property values have increased the profit opportunity for investors that convert rent controlled units to tenancies-in-common which can be sold much like condominiums. Second, after a period of tight lending, banks are providing more favorable terms for so-called "fractionalized loans," a shift that has made TIC interests more marketable.



Mary Elizabeth Phillips is scheduled to be evicted by Urban Green Investments through the 55 Dolores Street LLC in April, 2014, the month that she will be turning 98. She has nowhere else to go. As Mary says, "This has been my home for over 40 years and I don't want to leave. . . I am just too old." Being displaced from her home means being displaced from the city that she has lived in for 76 years because rent in San Francisco is too high. It also means being cut off from social support that she has developed over the course of a lifetime.

OWNERSHIP CHANGE DATA

Tenants Together and the Anti-Eviction Mapping Project undertook a detailed analysis of rent board data and property ownership records. The results were startling: in 2013, 60% of Ellis Act evictions¹ were by owners who had owned the property for less than one year. The majority of those were during the first six months of ownership. Likewise, 79% of Ellis Act evictions were by owners within their first five years of ownership of the property. Only 21% of the evictions were by long-time property owners. The cumulative data from 2009-2013 was similar, with 51% of Ellis Act evictions filed within less than one year of ownership and 78% filed within the first five years.

The following chart sets forth the combined data for 2009-2013:

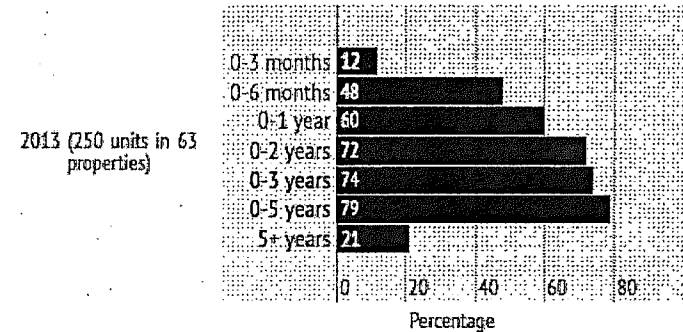
Length of Ownership before Invoking Ellis Act	# of Units	PERCENTAGE BY Specific Range	PERCENTAGE BY CUMULATIVE RANGE
5+	126	22%	5+ 22%
3-5 Years	42	7%	0-5 years 78%
2-3 Years	30	5%	0-3 years 71%
1-2 Years	82	14%	0-2 years 66%
6 months - 1 Year	57	10%	0-1 year 51%
3-6 months	136	24%	0-6 months 42%
0-3 months	104	18%	0-3 months 18%
Total Units Ellised	577	100%	

Looking at the ownership length by building, rather than by unit, the same pattern emerges. From 2009-2013, owners of less than one-year accounted for 43% of the buildings on which the Ellis Act was invoked, while owners of less than five-years accounted for 69% of Ellised buildings.

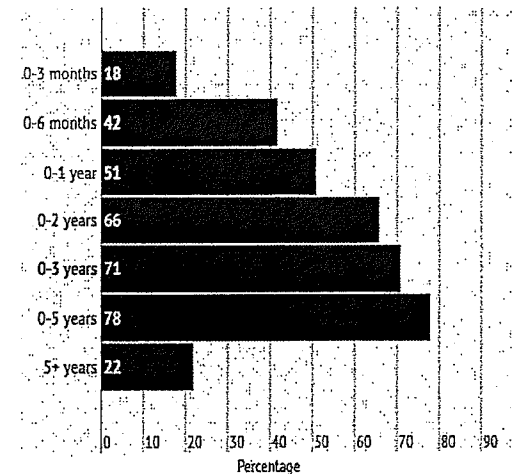
Length of Ownership before Invoking Ellis Act	# build-ings	PERCENTAGE BY Specific Range	PERCENTAGE BY CUMULATIVE RANGE
5+	55	31%	5+ 31%
3-5 Years	16	9%	0-5 years 69%
2-3 Years	9	5%	0-3 years 60%
1-2 Years	21	12%	0-2 years 55%
6 months - 1 Year	17	10%	0-1 year 43%
3-6 months	26	15%	0-6 months 34%
0-3 months	34	19%	0-3 months 19%
Total Buildings Ellised	178	100%	

¹ This is a de-duplicated figure, meaning that re-fillings on the same property were excluded.

Percentage of Ellis Evictions by Ownership Length, 2013



Percentage of Ellis Evictions by Ownership Length, 2009-2013



SERIAL USE OF ELLIS ACT

In reviewing Ellis Act records, a clear trend emerged. Some of the same names appeared on multiple Ellis Act filings. Further research into corporate owners revealed that some individuals were involved in Ellis Act evictions through multiple corporate entities.

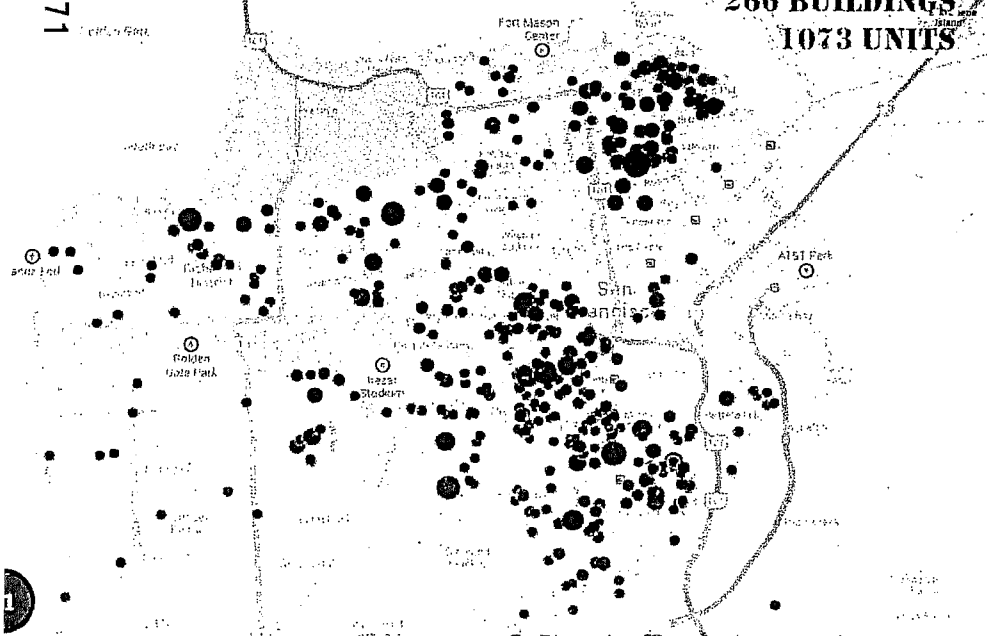
An exhaustive review of all records since 1997 revealed the following: 30% of units were Ellised by an owner that has used the Ellis Act on another property. These are referred to as "Serial Evictors."

Some of these Serial Evictors have used the Act to evict tenants from many properties. For example, Kaushik Dattani has invoked the Ellis Act on 25 units and Urban Green Investments has invoked the Ellis Act on 28 units.

	Buildings	Units
Ellis Petitions (De-duplicated) 1997-2013:	1251	3610
Number by Serial Evictors:	266	1073
Percentage by Serial Evictors	21%	30%

Ellis Acts Committed by Serial Evictors

1997-2013



SPECULATOR PROFILES

SERGIO IANTORNO

Sergio Castellucci Iantorno is the owner of Peninsula Realty, LLC, Realty West, LLC, and Golden Properties, LLC, and San Francisco Developers, LLC, and is affiliated with Vanguard Real Estate and DBA Realty West.

He is currently evicting 19 units through the Ellis Act:

630-636A Guerrero St. (6 units) - Ellised on 12/30/2013 by Peninsula Realty, LLC. 19 people will be evicted. Two seniors live there, as well as many family members. One tenant has lived there since 1978.
1353-57 Folsom St. (3 units) - Ellised on 12/30/2013 by Golden Properties, LLC. 17 people will be evicted, including two large multi-generational families. The building contains a 72 year old tenant and a tenant who has lived there since 1979.

642-646 Guerrero St. (4 units) - Ellised on 12/30/2013 by Golden Properties, LLC, where 5 people will be evicted. One has resided there since 1966, for 47 years.

380 San Jose (4 units) - Ellised on 7/2013 by Golden Properties, LLC. Home of artists Rene Yañez, Yolanda Lopez, and Rio Yañez. Petition L131068.

70-72 Belcher St (2 units) Ellised on 7/2013 by Golden Properties, LLC. Petition L131075.

UGI is a San Francisco Multi-family portfolio of over 385 units. In 2012 they purchased a 130 unit multi-family portfolio and 40 TIC units, and picked up a 12-building multifamily portfolio for \$38 Million cash from Prana Investments.

URBAN GREEN INVESTMENTS

Using dozens of LLCs, UGI and its CEO have invoked the Ellis Act on 28 units:

1070 Post St. (6 units) - Ellised on 1/31/13 by 1070 Post Street, LLC. Petition L130141.

49-53 Guerrero St. (3 units) - Ellised on 5/17/13 by 49 Guerrero Street, LLC. Petition: L130760.

55 Dolores St. (5 units) Ellised on 4/8/2013 by 55 Dolores Street, LLC. Petition L130542.

566-576 Lombard St. (14 units) - Ellised 2/4/13 by 566 Lombard Street, LLC. Petition L130157.

KAUSHIK DATTANI

Kaushik "Ken" Mulji Dattani is affiliated with numerous LLCs and corporations, including: Diva Investments - Managing Member; Dattani & Company - Principal; Kapu Properties, LLC - Member; Haveli Inc. - President; 363 Valencia, LLC - Managing Member; CA1INVESTMENT Company - Member.

Dattani has used the Ellis Act on 25 units, including:

3305-3321 20th Street (9 units) - Ellised on 8/16/2013, by Kaushik Mulji Dattani, as Trustee of the M. Dattani Credit, Petition L131379.

3465 - 3469 19th Street (3 units) - Ellised on 12/5/2007, by 363 Valencia, LLC. Petition L0719642007.

3224 - 3248 22nd Street (13 units) - Ellised on 10/10/2007, by Kaushik Dattani, as Trustee of the M. Dattani Credit Trust. Petition L071559

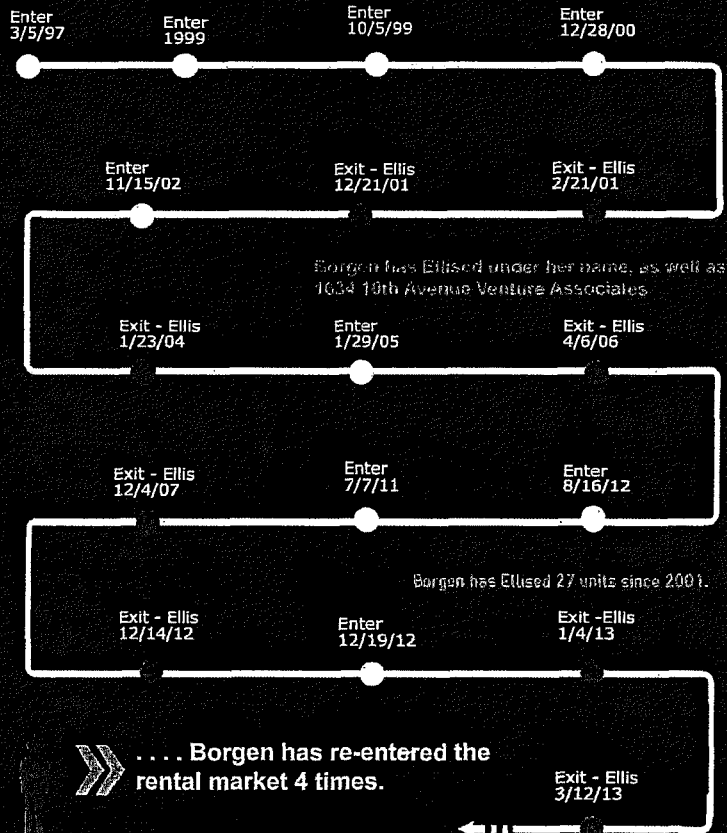
A REVOLVING DOOR OF EVICTIONS

Some speculators have entered, exited, re-entered, and re-exited the rental business, evicting tenants from multiple buildings. These speculators clearly have no plan to exit the rental business but are simply using the Ellis Act to convert the buildings to other uses and then acquire new rental properties for the same purpose. The following timeline tracks the multiple entries into and exits from the rental market of one such speculator.

Elba Borgen



Since Ellising two properties in 2001 and exiting the rental market. . .



RECOMMENDATIONS

The data reveals extensive displacement due to the Ellis Act, with a trend of use of the Ellis Act by recent purchasers and by repeat evictors.

Speculators are exploiting a loophole in the Act that allows them to buy a building and then immediately "exit the rental business" through evictions of tenants. The stories are disturbing, with seniors and families losing their long-term homes.

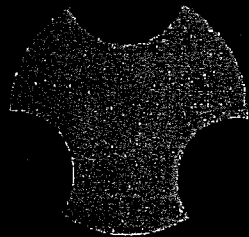
The negative consequences of the Ellis Act are clear, including: large scale displacement of tenants. To date, no research or reports have documented what, if any, societal benefit has come from affording property owners a statutory right to exit the rental housing business. According to a website recently launched by the California Apartment Association to fight Ellis Act reform, the Act is needed to allow landlords to "exit the rental market to avoid bankruptcy,"¹ but no evidence is presented to show this is how the Ellis Act is used. If such evidence were presented, one possible policy reform would be to limit use of the Ellis Act to situations where an owner shows that the Act is needed for the purpose of avoiding bankruptcy. Real estate speculators would likely not be able to meet such a standard.

Two targeted reforms would ensure that use of the Ellis Act is confined to long-term landlords, not real estate speculators who get into the rental business just to get out of it through mass evictions. First, the Ellis Act should not be available to new owners of property for a certain number of years. By imposing a period of time after ownership during which the Ellis Act cannot be used, such a reform would deter speculator abuse of the Act while preserving the statutory right of long-term landlords who seek to get out of the rental business. The period of time between purchase and eviction would need to be long enough to provide a disincentive to prevent speculators from simply buying properties and waiting out the time period. Such a reform would also need to prohibit prospective buyers from acting in concert with current landlords to circumvent the law. Moreover, to implement these restrictions, there would need to be additional transparency regarding the persons and entities with ownership interests in these properties.

Second, serial use of the Ellis Act on multiple properties by the same owners is problematic and should be prohibited. At minimum, an owner should be prohibited from evicting under the Ellis Act if the owner acquired the subject property after previously invoking the Act. Once someone evicts to exit the rental housing business, there is no compelling policy reason to allow them to re-enter the rental business just to evict again under the Ellis Act on another property.

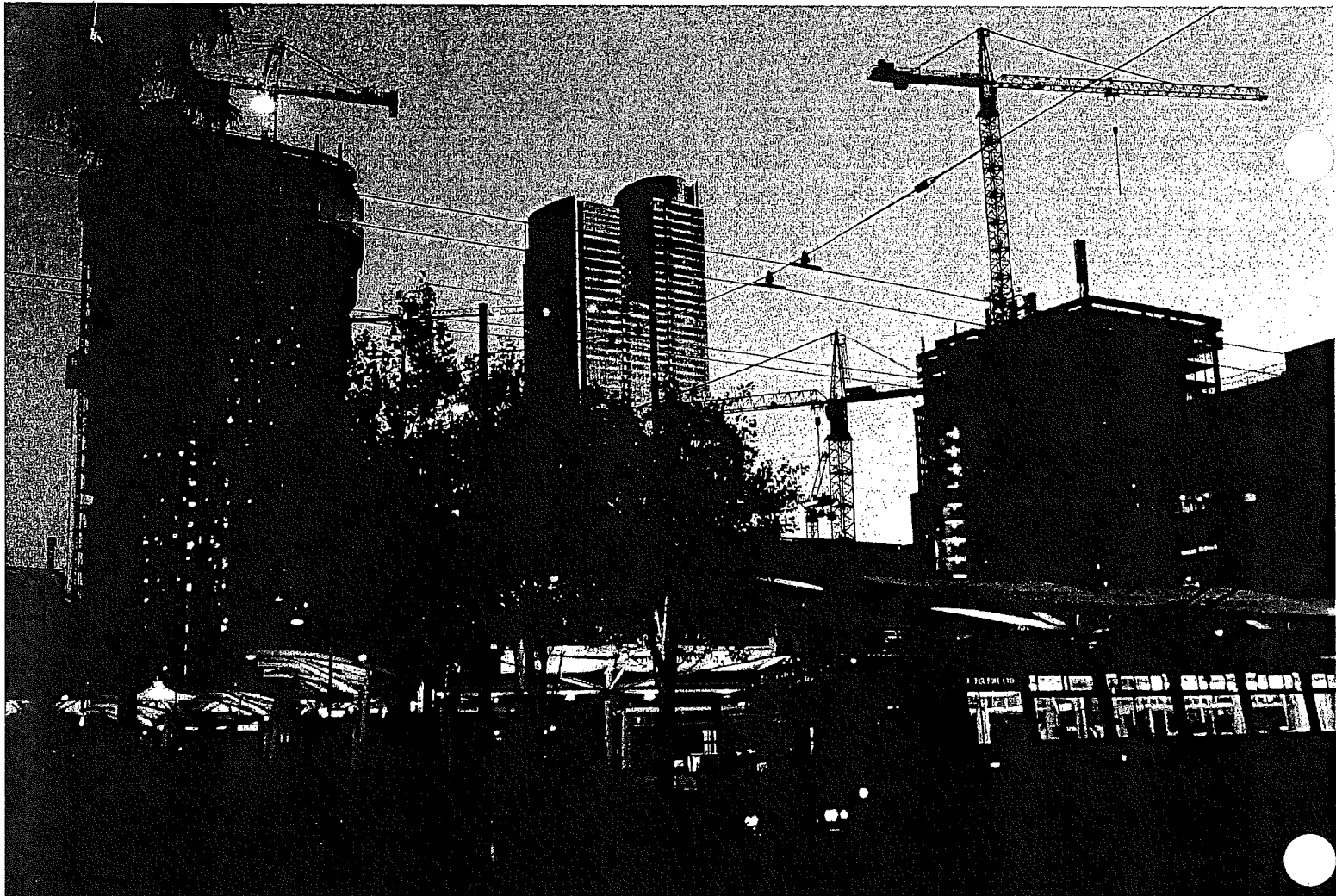
These policy changes would limit use of the Ellis Act to its intended beneficiaries: landlords.

1. California Apartment Association & San Francisco Apartment Association website: www.preservetheellisact.org.



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San Francisco
PIPELINE REPORT *Quarter 3 2014*

San Francisco Planning Department
December 2014



Cover Photo: Residential development near the Temporary Transbay Terminal. Source: Aksel Olsen

**San Francisco
PIPELINE REPORT**

Third Quarter 2014

San Francisco Planning Department

December 2014



Table of Contents

Contents

WHAT IS THE PIPELINE?.....	1
ACCURACY AND TIMELINESS.....	1
THE DEVELOPMENT PIPELINE.....	3
PROJECTS BY OVERALL STATUS.....	3
AMOUNT AND TYPE OF NET NEW COMMERCIAL SPACE.....	4
LOCATION OF NEW DEVELOPMENT.....	5
PIPELINE PROJECTS BY CURRENT ZONING CATEGORY.....	7
RESIDENTIAL PIPELINE BY PROJECT SIZE.....	11
INCLUSIONARY HOUSING.....	13
RECENT ACTIVITY.....	14
PROJECT APPLICATION FILINGS DURING Q3 2014.....	14
COMPLETED PROJECTS DURING THE PAST FOUR QUARTERS.....	15
DATA DICTIONARY.....	19
ACKNOWLEDGEMENTS.....	29

List of Tables

RESIDENTIAL AND COMMERCIAL PIPELINE, BY PIPELINE STATUS AND LAND USE CATEGORY.....	3
RESIDENTIAL AND COMMERCIAL PIPELINE, BY NEIGHBORHOOD.....	4
RESIDENTIAL AND COMMERCIAL PIPELINE BY GENERALIZED ZONING CATEGORY.....	7
PROJECTS BY NEIGHBORHOOD AND BUILDING SIZE.....	9
PDR SPACE CONVERSION TO RESIDENTIAL USE, BY PLANNING DISTRICT.....	12
OFFICE SPACE CONVERSION TO RESIDENTIAL USE, BY PLANNING DISTRICT.....	12
INCLUSIONARY HOUSING PIPELINE, BY TYPE.....	13
PROJECTS COMPLETED PAST YEAR, BY USE TYPE.....	15

List of Figures

RESIDENTIAL PIPELINE SIZE DISTRIBUTION, BY NEIGHBORHOOD.....	5
RESIDENTIAL PIPELINE SIZE DISTRIBUTION, BY ZONING CATEGORY.....	6
NON-RESIDENTIAL PIPELINE SIZE DISTRIBUTION, BY ZONING CATEGORY.....	6
RESIDENTIAL PIPELINE, BY STATUS & BUILDING SIZE.....	10
NON-RESIDENTIAL PIPELINE, BY STATUS & BUILDING SIZE.....	10
PIPELINE OVER TIME: PROJECTS FILED / APPROVED.....	14
RELATION BETWEEN PROJECT SIZE AND MONTHS TO COMPLETION, BY ZONING AND LAND USE.....	15

List of Maps

GENERAL OVERVIEW OF MAGNITUDE AND LOCATION OF DEVELOPMENT, BY MAJOR LAND USE TYPE.....	2
INCLUSIONARY AFFORDABLE HOUSING PIPELINE, BY TYPE AND SIZE.....	13
MAGNITUDE AND LOCATION OF PAST YEAR'S COMPLETED DEVELOPMENT, BY MAJOR LAND USE TYPE.....	16
NEIGHBORHOOD DESIGNATION FOR PIPELINE REPORT.....	17
GENERALIZED ZONING DISTRICTS.....	18

WHAT IS THE PIPELINE?

The San Francisco consolidated pipeline consists of development projects that would add residential units or commercial space, applications for which have been formally submitted to the Planning Department or the Department of Building Inspection (DBI). Pipeline projects encompass various stages of development: from applications filed to entitlements secured, building permits issued to projects under construction. The pipeline includes only those projects with a land use or building permit application. It does not include projects undergoing preliminary Planning Department project review or projections based on area plan analysis. When a project is issued a Certificate of Final Completion by DBI, it is taken out of the pipeline.

To filter inactive projects, the current pipeline only includes projects filed during the last five years, projects approved in the last four years (with the exception of large projects, which are kept for seven years), and projects for which construction has begun during the past three years.

Data sources for the pipeline are chiefly the project databases maintained by the Planning Department and the Department of Building Inspection, respectively, but data is also periodically obtained from the (now Successor Agency to the) San Francisco Redevelopment Agency. Affordable housing projects sponsored by the Mayor's Office of Housing figure in the pipeline database only after an application has been filed with either the Planning Department or the Department of Building Inspection.

The *Pipeline Report* measures housing production in terms of housing units. Non-residential development, on the other hand, is measured in terms of building square footage. Depending on the proposed development project, square footage can be added with new construction or expansion, reduced with demolition or alteration, or re-allocated with conversion to other uses. This report counts *net change*, or new space or units minus existing space lost through conversion or demolition.

Time Frame and Certainty of Development

As the pipeline spans the entire project development life cycle for small and large projects ranging from addition of an extra unit in the rear yard to multi-structure complexes of residential and commercial development needing environmental impact reports and transportation studies, it follows that the entitlement and ultimate actualization of some projects is several years and occasionally decades into the future, while some projects are abandoned altogether prior to receiving a permit or completion. The pipeline, then, represents a particular scenario that assumes that all proposed development projects are eventually entitled and all entitled development projects eventually built. In reality, this is not the case.

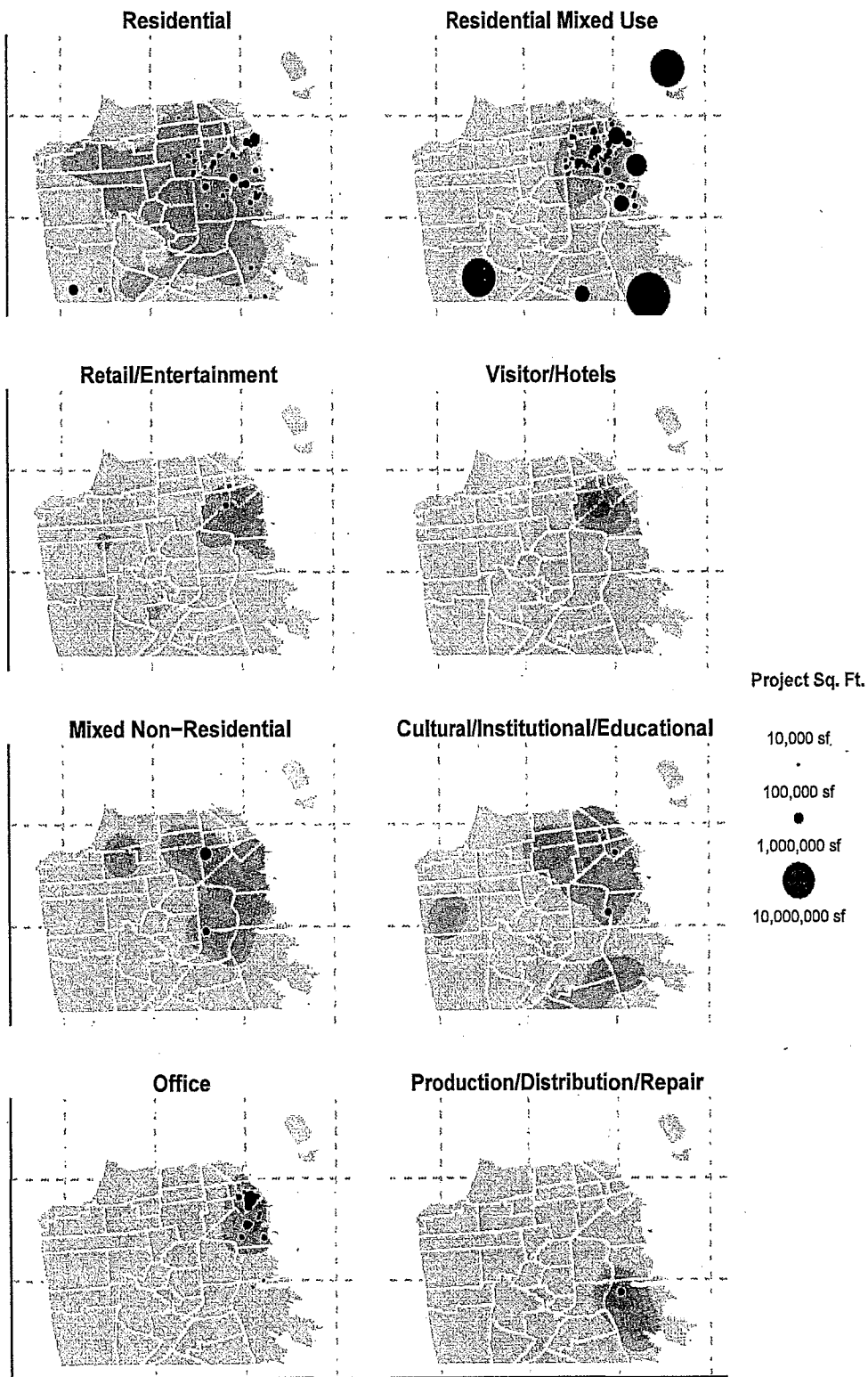
The Relevance of the Pipeline

The pipeline serves as a barometer of development trends in the medium to long term time horizon. It illustrates the location and scale of current and proposed future construction and reveals where new land uses are being established; it also records demolition and a partial listing of conversion of existing land uses. In sum, the pipeline provides a short- to medium-term picture of changing land uses, specifically tracking the changes to the city's housing stock and commercial uses. This report is meant to be a short overview.

Accuracy and Timeliness

The pipeline is compiled and consolidated from different data sources and is subject to errors due to varying accuracy and currency of original sources. The data in this report is pulled from original sources current through September 30, 2014. While we make an effort to consolidate multiple permits for different components of the same project from different agencies, it is not possible to validate the accuracy of all projects. Should you find inaccuracies and omissions, please e-mail your comments to aksel.olsen@sfgov.org.

Map 1. General Overview of Magnitude and Location of Development, by Major Land Use Type



THE DEVELOPMENT PIPELINE

There are currently 958 projects in the pipeline. Of these, 75 percent are exclusively residential and 17 percent are mixed-use projects with both residential and commercial components. Only 8 percent of projects are non-residential developments. Map 1 (left) gives the general location and magnitude of this development across is many stages.

A net total of 50,600 new housing units would be added to the city's housing stock according to current data. This is high relative to historical numbers and is largely due to the filing and entitlement of applications during the past five years for new large scale, long term development programs for Parkmerced, Treasure Island and the Bayview Waterfront. These projects, as well as their expected development over the course of decades must be kept in mind when considering the overall totals. The vast majority of pipeline projects, however, are small scale consisting of one to three units. The number of new projects slowed down during the Great Recession of 2007-2009 and beyond, but has since recovered in earnest as evidenced by both new project applications as well as the construction of projects with "older" entitlements. The "hot spot" for much of this development is Market Street at various sections of it. While this may seem a response to the recent acceleration of technology companies locating in the area, many development projects here predate the last recession, during which they were idle. As financing improved, many projects came back.

Projects by Overall Status

Table 1 breaks down projects, housing units and non-residential space by planning stage. First are non-entitled projects. A number of projects file building permit applications even as their projects have not cleared planning entitlements. The second major group include entitled projects; those which have completed the planning process and obtained necessary approvals. These are then divided into different stages of the building permitting process. Table 1 shows the following:

- Around 21 percent of all projects, representing 6,700 net added housing units and 5,400,000 sq ft of commercial space, are under construction.
- Around 20 percent of projects (with another 4,100 net units and 2,1 million sq ft of commercial space) have received building permit approvals. As of the time of writing, some may have moved to the construction phase.
- Around one in three projects (including 900 net new units and an net loss of 60,000 sq ft of commercial space) have filed building permit applications with the Department of Building Inspections. A small number of projects have filed applications but have yet to receive planning approvals.
- One in eight projects and 55 percent of the units and 37 percent of the non-residential space have received Planning Department approvals. These projects now must secure building permits.

Table 1. Residential and Commercial Pipeline, by Pipeline Status and Land Use Category

Entitlement Status	Status	Total No. of Projects	Net Housing Units	Net Comm'l Sq. Ft.	Net Commercial Gross Square Footage					
					CIE	Medical	Office	PDR	Retail	Visitor
Under Planning Review	Planning Filed	121	8,900	4,568,300	(20,200)	-	3,806,300	(444,400)	711,900	514,600
	BP Filed	329	3,100	634,900	913,000	-	141,800	(98,800)	(56,300)	(264,800)
	Total, Not Entitled	450	12,000	5,203,200	892,800	-	3,948,200	(543,200)	655,700	249,700
Approved by Planning	PL Approved	80	26,900	6,131,200	33,600	-	3,762,000	296,700	1,612,700	426,200
	BP Filed	30	900	(61,500)	(5,700)	-	(19,600)	(58,100)	38,200	(16,300)
	BP Approved/ Issued/ Re-Instated	183	4,100	2,055,500	111,300	20,000	1,325,700	7,900	463,400	127,200
	Construction	215	6,700	5,405,900	567,800	1,767,400	2,986,700	(8,100)	86,600	5,400
	Total, Entitled	508	38,600	13,531,100	707,000	1,787,400	8,054,900	238,400	2,201,000	542,500
Total		958	50,600	18,734,300	1,599,800	1,787,400	12,002,900	(304,800)	2,856,500	792,300

Table 2. Residential and Commercial Pipeline, by Neighborhood

Neighborhood	Projects	Percent	Net Units	Percent	Avg Units / Project	Net Comm'l Sq. Ft.	Residential Rank	Commercial Rank
Balboa Park	5	1%	100	0%	20	9,180	25	18
Bernal Heights	44	5%	120	0%	3	165,930	22	12
Buena Vista	21	2%	60	0%	3	-150	28	25
BVHP Area A,B	35	4%	420	1%	13	418,000	18	10
Candlestick	3	0%	10,310	20%	3,438	4,110,000	1	2
Central	78	8%	110	0%	1	5,320	24	21
Central Waterfront	19	2%	1,350	3%	71	-333,690	11	33
Downtown	44	5%	3,400	7%	85	1,684,280	5	5
East SoMa	36	4%	1,530	3%	42	621,070	10	8
Executive Park	1	0%	10	0%	12	0	32	22
Glen Park Compact	1	0%	0	0%	1	0	34	22
HP Shipyard	5	1%	50	0%	11	0	29	22
India Basin	4	0%	20	0%	6	-8,620	30	27
Ingleside, Other	41	4%	120	0%	3	25,350	23	14
Inner Sunset	42	4%	100	0%	2	6,520	26	19
Japantown	3	0%	0	0%	1	13,400	33	17
Marina	33	3%	390	1%	12	-8,950	19	28
Market Octavia	50	5%	2,900	6%	58	-419,880	6	34
Mission	79	8%	1,210	2%	15	-62,370	12	30
Mission Bay	5	1%	450	1%	113	2,445,500	17	3
Northeast	49	5%	940	2%	19	-233,750	14	32
Other S Bayshore	21	2%	140	0%	7	5,840	21	20
Outer Sunset	33	3%	100	0%	3	20,000	26	15
Park Merced	2	0%	5,860	12%	2,930	478,380	3	9
Richmond	84	9%	230	0%	3	18,090	20	16
Rincon Hill	8	1%	2,370	5%	296	-94,530	7	31
Showpl/Potrero	56	6%	4,070	8%	74	1,088,900	4	6
South Central, Other	70	7%	1,170	2%	17	93,130	13	13
South of Market, Other	4	0%	1,890	4%	631	2,043,630	8	4
TB Combo	10	1%	1,730	3%	173	5,275,150	9	1
Treasure Island	1	0%	7,800	15%	7,800	381,000	2	11
VisVal	4	0%	20	0%	5	-1,250	31	26
Western Addition	36	4%	720	1%	20	-50,730	16	29
WSoMa	31	3%	880	2%	30	1,039,480	15	7
Grand Total	958	100%	50,570	100%	15,917	18,559,270		

- Twelve percent of projects, representing 8,900 units and 4.6 million commercial square feet are under initial Planning Department review.

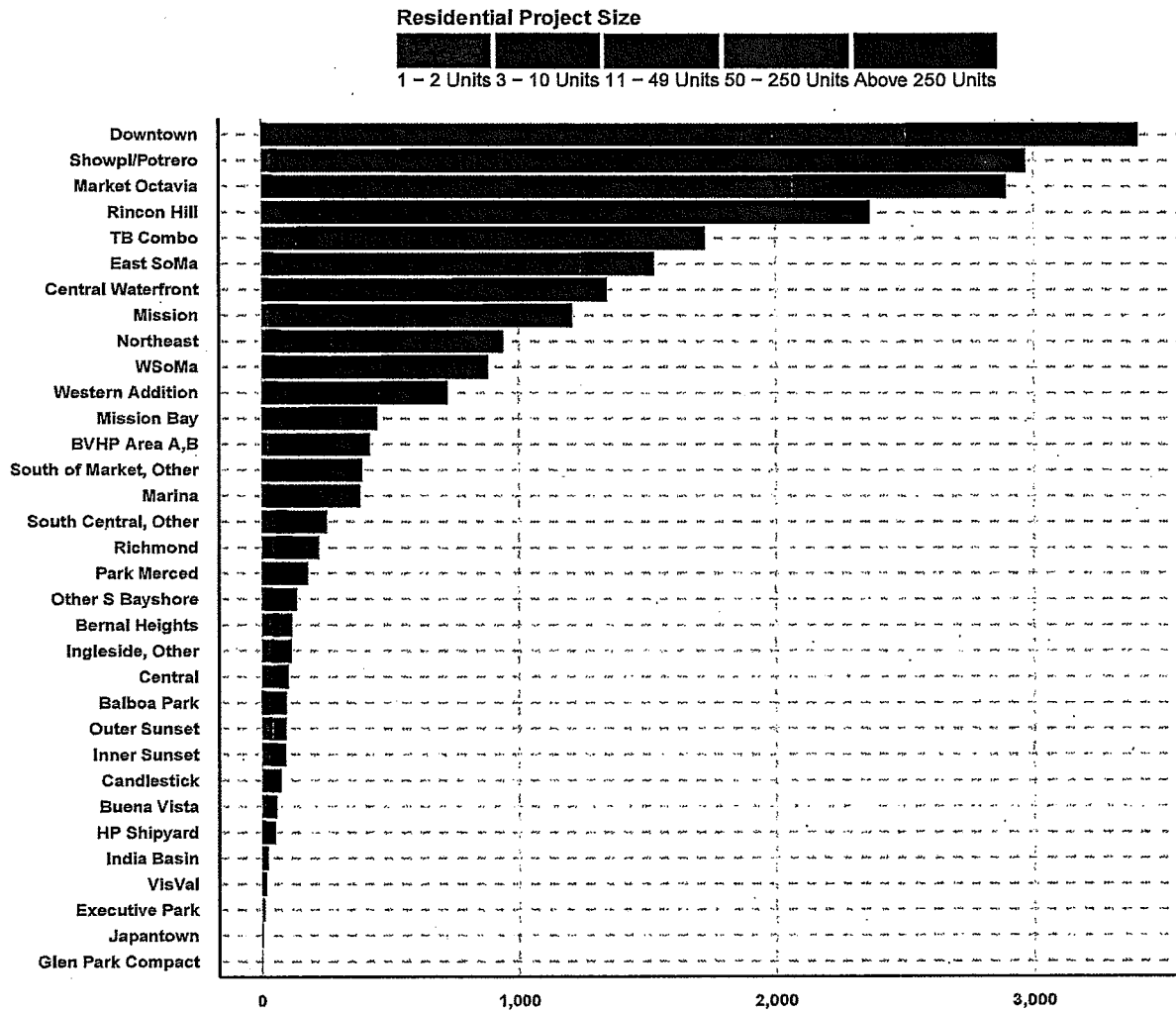
Amount and Type of Net New Commercial Space

Projects in the current pipeline as noted also represent a potential net addition of 18.7 million sq ft of commercial development that would result in the

following land use inventory changes:

- 12 million sq ft of office space
- 2.9 million sq ft of retail space
- 800,000 sq ft of visitor-serving uses, such as hotels or hostels.
- 1.6 million sq ft of cultural, institutional, educational (CIE), and 1.8 million sq ft of medical space

Figure 1. Residential Pipeline Size Distribution, by Neighborhood



Note: The three largest projects (Candlestick, Parkmerced, Treasure Island) are not included in the data behind this chart for readability.

- An overall loss of around 300,000 sq ft of space for production, distribution and repair (PDR).

Location of New Development

Table 2 shows the three most active areas for residential development include Bayview/Hunter’s Point/Candlestick (where the Bayview Waterfront Project is located), Treasure Island and Parkmerced. All these projects have now been entitled. Full realization of these three projects will be decades into the future. These three areas would account for around 25,800 net units or about half of all net

additional units in the pipeline. (See Map 3 for area boundaries used.)

Other areas with active residential development include Downtown, Market & Octavia, and Rincon Hill.

On the commercial side, more than 90 percent of the new space would be added in the Bayview/ Candlestick, Downtown districts, Mission Bay, and Transbay areas. Of these, the bulk of this space would take place in Bayview and Downtown C-3 districts.

Figure 2. Residential Pipeline Size Distribution, by Zoning Category

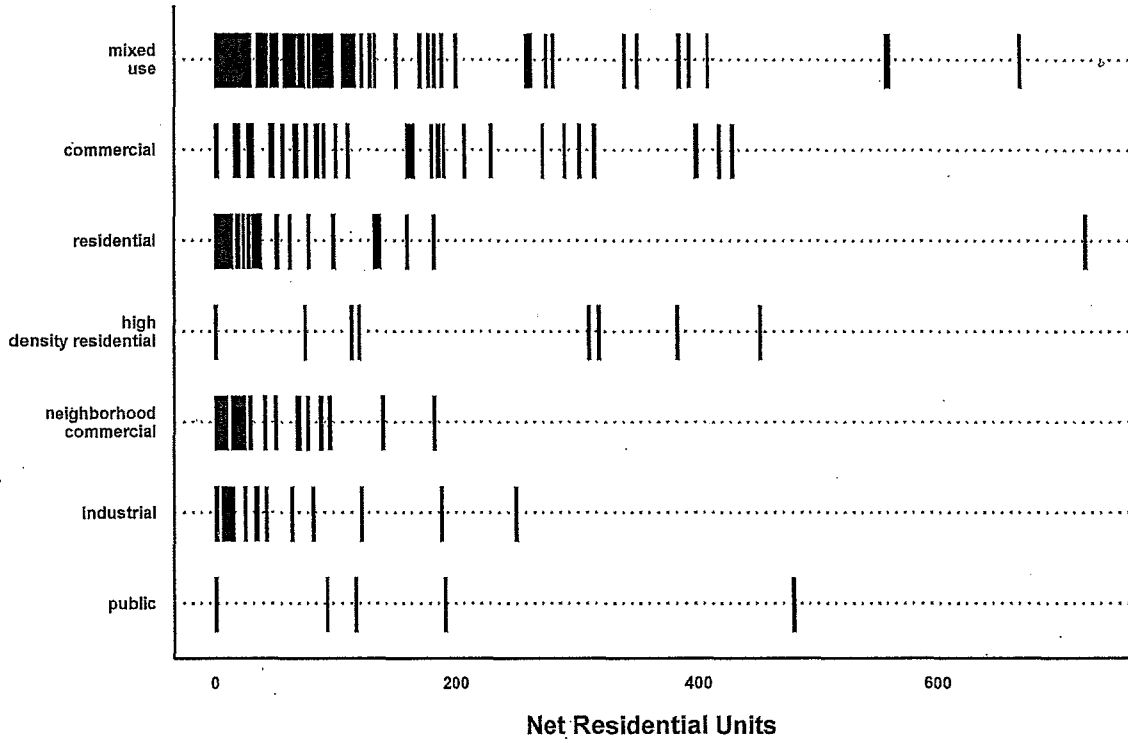
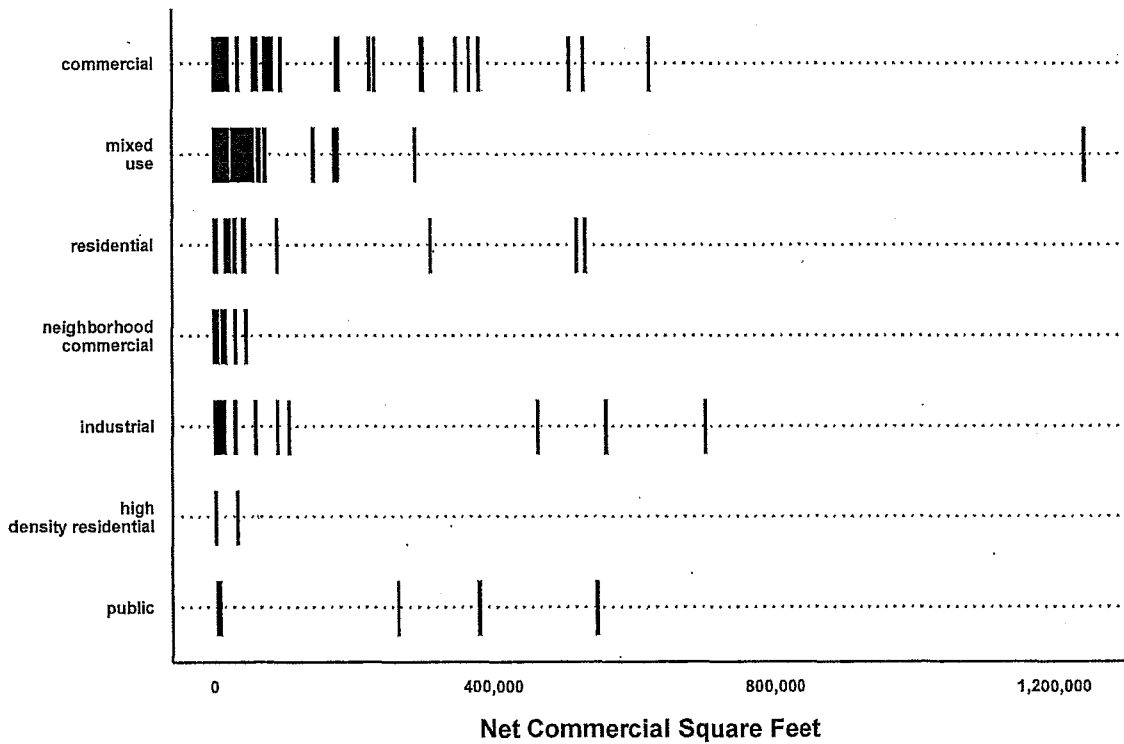


Figure 3. Non-Residential Pipeline Size Distribution, by Zoning Category



Note: Figure 2 and Figure 3 show each project plotted along an axis showing project size, by general zoning type. Projects plotted are truncated to the 99th percentile for readability.

It is perhaps worth noting how geographically concentrated development is, for both residential and commercial uses. In both cases, the majority of potential development would happen in a handful of projects, in a handful of districts.

Pipeline Projects by Current Zoning Category

There is considerable variation on project sizes between—but also within—zoning district categories. Some zoning districts display similarly typed and

sized projects, while others are host to a great variety of project sizes and types.

Residential Pipeline

Figure 2 and Figure 3 give details on the size distribution for residential and non-residential projects, respectively, using plots where the position of each vertical bar represents the size of a development project, measured in square feet (a more rightward position means a larger project).

Table 3. Residential and Commercial Pipeline by Generalized Zoning Category

District Type	Simplified Zoning	Projects	Net Units	Net Gross Sq. Ft.	Cult., Inst., Educ.	Medical	Office	Prod., Dist., Repair	Retail	Visitor
Commercial	C-2	10	161	26,140	0	0	8,000	0	18,000	0
	C-3	48	5,907	4,498,430	102,000	0	2,698,000	-60,000	809,000	949,000
Neighborhood Commercial	NC	23	178	-5,790	0	0	7,000	0	-12,000	0
	NCT	30	1,320	1,270	13,000	0	8,000	-6,000	-18,000	5,000
Industrial	M	6	1,822	1,970,500	8,000	0	1,700,000	13,000	250,000	0
	PDR	20	268	942,900	0	0	773,000	144,000	26,000	0
	SLI	4	0	673,804	0	0	695,000	-30,000	10,000	0
	HP-RA	13	247	0	0	0	0	0	0	0
Mixed Use	C-M	1	121	300	0	0	2,000	-4,000	2,000	0
	CRNC	1	0	68,010	68,000	0	0	0	0	0
	CVR	1	23	-8,290	0	0	0	0	-8,000	0
	MUG	10	548	23,800	0	0	0	-2,000	59,000	-32,000
	MUO	14	260	940,660	0	0	893,000	-73,000	30,000	91,000
	MUR	16	1,138	-44,480	0	0	-9,000	-57,000	22,000	0
	NC	81	904	-17,290	-2,000	-25,000	26,000	-15,000	16,000	-16,000
	NCT	17	571	119,290	107,000	0	12,000	-8,000	9,000	0
	RC	20	1,423	670,800	904,000	0	-18,000	17,000	-4,000	-228,000
	RED	14	171	680	0	0	10,000	-9,000	0	0
	SLR	5	76	13,160	0	0	16,000	-3,000	0	0
	SPD	2	2	3,720	0	0	4,000	-1,000	1,000	0
	UMU	43	4,362	-243,030	0	0	199,000	-505,000	64,000	0
	CCB	1	1	0	0	0	0	0	0	0
Public	P	11	18,917	6,670,830	431,000	0	4,456,000	399,000	1,043,000	341,000
	MB	1	0	264,000	0	0	264,000	0	0	0
Residential	RH	433	744	155,060	-59,000	0	215,000	-5,000	21,000	-17,000
	RM	85	8,894	328,620	38,000	12,000	103,000	-9,000	485,000	-300,000
	RTO	37	272	-24,820	-8,000	0	-21,000	-19,000	24,000	0
High Density Residential	DTR	8	1,775	-94,530	0	0	-36,000	-71,000	12,000	0
Grand Total		958	50,556	18,734,210	1,600,000	1,787,000	12,003,000	-305,000	2,857,000	792,000

Per the top panel, the largest projects are found in mixed use, commercial and residential zone classes. While these projects have large projects, there is tremendous variation *within* these districts as well, as seen by the distance between the vertical lines. Projects in residential districts, on the other hand, are far more evenly sized, with the vast majority of projects consisting of fewer than 5 units. In the residential districts, there are a number of projects substantially larger than the rest, as seen from the outliers.

The lower panel analogously shows the size distribution for commercial projects, with lands zoned "public" accounting for the largest sizes, but note that this includes only a handful of projects.

Table 3 also shows the overall pipeline distribution by zoning categories, but with more detail. The vast majority of the residential pipeline falls on four land zoning classes: Public, Residential, Mixed Use, and Commercial. Two large projects are situated on parcels classified as "Public Land": the Bayview Waterfront project, most of which is at Candlestick Point, and the Treasure Island redevelopment project.¹ These projects could add more than 18,900 units.

Residential projects on *residentially* zoned lots, representing the largest number of projects, account for 9,900 units, or the second largest class. Two thirds of these units, however, are in the Parkmerced redesign project and a couple of large San Francisco Housing Authority projects (one in the Potrero Hill area, the other on Sunnydale Ave as part of the Hope SF program). The remainder of projects on residentially zoned parcels are relatively small with about a quarter of projects being single family housing projects. Small scale projects of one to nine units account for some 90 percent of the residential projects. Only a handful are larger and thus account for the majority of units.

The mixed use districts, a diverse group ranging from Eastern Neighborhoods districts to Chinatown, account for 10,100 units in 229 projects.

Residential projects on downtown commercial zoned lots would add 6,000 new units in 60 projects, although the count here also includes commercial only projects.

¹ Both the Bayview Waterfront and Treasure Island projects entail reclassification of zoning to new categories; however for the purposes of this report, they are still counted in the "Public" category they were predominantly located in as the entitlement proceedings began.

Another 2,300 units are pending on industrially zoned lands. About a third of these projects are mixed use projects with a commercial component. The added residential units in industrial areas are typically accompanied by loss of PDR space and addition of retail space (see Table 5).

Projects in neighborhood commercial districts would add 1,500 units in 53 projects.

Also of note, the high-density, transit-accessible downtown neighborhoods of Rincon Hill and Transbay which account for a fraction of one percent of the city's land area, nonetheless account for more than four percent of all units in the pipeline in a handful of projects. These projects would add 1,800 units.

In contrast, residential projects in the low-density residential (RH) districts are by per zoning requirements relatively small scaled, in-fill developments, accounting for some 45 percent of proposed projects but just 2 percent of the total units (or 744 net units) in the pipeline. Projects on RM-zoned (multi-family) lots, in turn, account for 9 percent of projects and 18 percent of units, again largely because of a large project, the Parkmerced re-design project. In terms of land area, residential zoning districts form the largest group, comprising 46 percent of the city land area.

Commercial Pipeline

Non-residential development is predominantly allowed in commercial and mixed use districts²; thus the majority of commercial space are proposed to be added in these land classes.

The commercial pipeline (counting by project type, not zoning district) in general is characterized by 77 projects, but also 161 mixed use projects which contain both residential and non-residential components. The commercial component in the 161 mixed use district projects are, in general also small, with half of projects being smaller than 5,000 gross square feet, respectively. (Some of these projects in mixed use *districts* are exclusively residential.)

The largest concentration of potential commercial development is in a small number of projects classified under public zoning³. Development here would

² Some institutional uses are allowed in residential districts, such as day care and residential care. Further, P-zoned properties are occasionally developed.

³ See Footnote 1.

add some net 6.7 million square feet, or 43 percent of all proposed commercial development, in just 11 projects. The largest of these projects is the Bayview Waterfront Project which would add millions of commercial square feet over a 20+ year period.

Downtown Commercial districts account for a sizable concentration of non-residential develop-

ment, with 2.7 million square feet in 56 projects. The mixed use districts account for a larger number of projects (even if this count may include projects that are exclusively residential) totalling 3.1 million square feet. Industrial districts would add another 3 million square feet. Remaining districts account for only a minor portion of non-residential development.

Table 4. Projects by Neighborhood and Building Size

Neighborhood	Project Size							Grand Total	Rank
	Single Family	2-9 Units	10-19 Units	20-49 Units	50-99 Units	100-249 Units	Above 250		
Balboa Park	0	17	13	0	71	0	0	101	28
Bernal Heights	17	68	0	0	50	0	0	133	24
Buena Vista	4	37	12	24	0	0	0	77	29
BVHP Area A,B	6	24	0	0	93	309	0	432	19
Candlestick	0	0	0	0	63	132	10,500	10,695	1
Central	17	154	0	0	0	0	0	171	22
Central Waterfront	1	29	18	78	294	330	599	1,347	12
Downtown	0	28	17	284	440	1,815	893	3,477	5
East SoMa	3	37	23	186	554	429	282	1,514	11
Executive Park	0	0	0	0	0	110	0	110	27
Glen Park Compact	0	2	0	0	0	0	0	2	34
HP Shipyard	0	18	36	0	0	0	0	54	30
India Basin	0	24	0	0	0	0	0	24	31
Ingleside, Other	13	56	11	53	0	0	722	855	16
Inner Sunset	16	52	10	34	0	0	0	112	26
Japantown	0	4	0	0	0	0	0	4	33
Marina	8	45	36	163	154	0	0	406	20
Market Octavia	1	67	74	355	225	1,417	828	2,967	6
Mission	5	184	79	175	233	291	351	1,318	13
Mission Bay	0	0	0	0	0	188	263	451	18
Northeast	3	104	36	182	232	437	0	994	14
Other S Bayshore	6	45	0	94	0	0	0	145	23
Outer Sunset	3	61	0	0	56	0	0	120	25
Park Merced	0	0	0	0	0	182	8,898	9,080	2
Richmond	7	191	13	39	50	0	0	300	21
Rincon Hill	1	0	0	0	0	232	2,137	2,370	7
Showpl/Potrero	2	93	56	69	159	200	4,122	4,701	4
South Central, Other	30	90	10	32	122	0	1,700	1,984	8
South of Market, Other	0	0	0	0	0	394	1,500	1,894	9
TB Combo	0	0	0	0	140	0	1,587	1,727	10
Treasure Island	0	0	0	0	0	0	8,619	8,619	3
VisVal	0	24	0	0	0	0	0	24	31
Western Addition	6	78	0	24	397	0	260	765	17
WSoMa	4	44	62	68	65	249	408	900	15
Grand Total	153	1,574	506	1,858	3,398	6,715	43,669	57,873	

Notes:

/1/ Housing unit counts are not rounded.

/2/ As the table categorizes by building size, numbers here represent total units as opposed to net units (subtracting replaced units), for which reason the unit count is higher than in other summary tables.

Figure 4. Residential Pipeline, by Status & Building Size

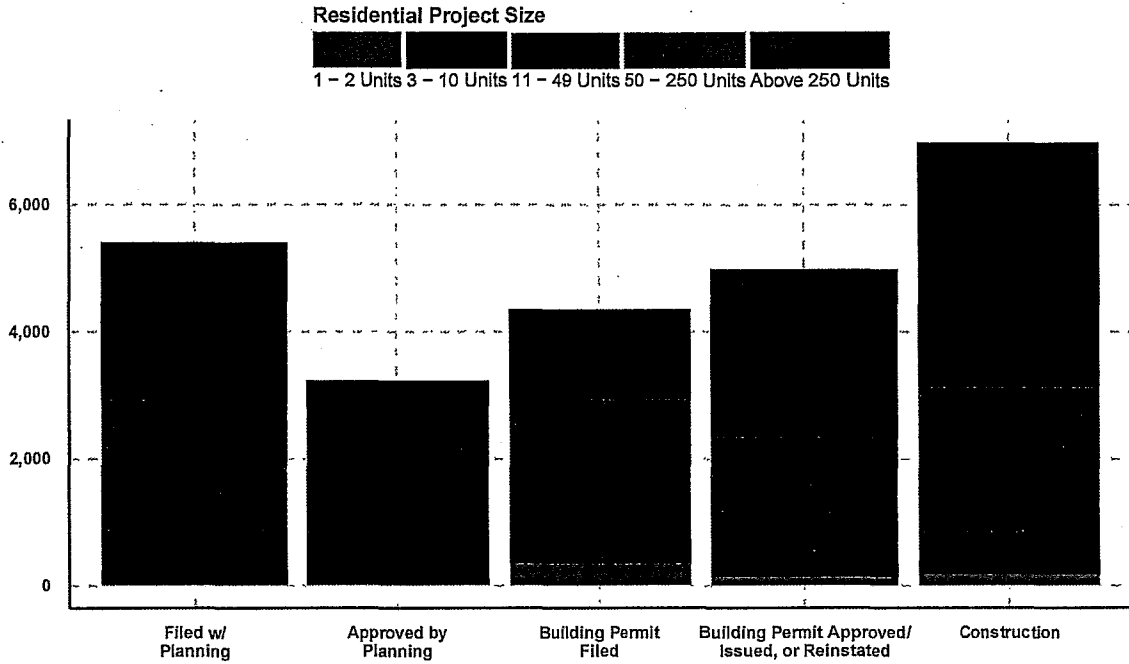
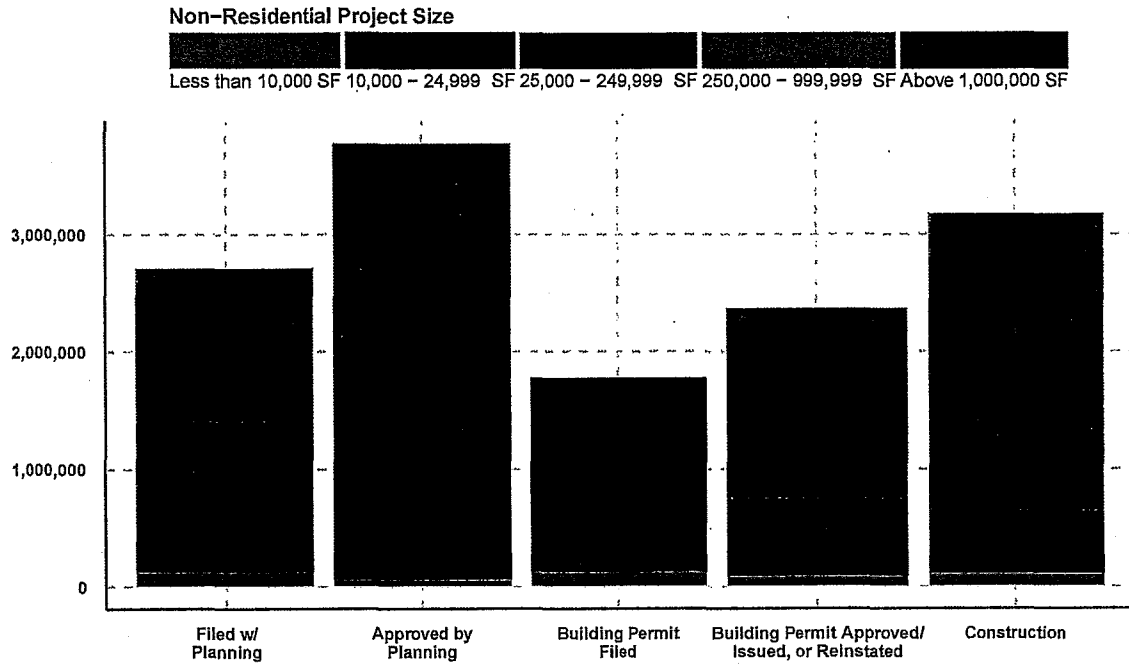


Figure 5. Non-Residential Pipeline, by Status & Building Size



High density residential districts will see some loss of commercial square footage as some of these spaces are converted to residential uses

Also of note the UCSF hospital project in Mission Bay is currently undergoing construction, expected to be done early 2015.⁴

Residential Pipeline by Project Size

Table 4 shows the residential pipeline by neighborhood, and offers detail on the project size. In most cases this is measures the number of units in the building. However, a handful of projects include more than one building thus making this accounting an approximation.

Project sizes vary by area. Thus we see that, for instance, Downtown will get the bulk of its units in large projects (50-99 units, 100-249 units, above 249 units). This is also the case for areas like Market Octavia, Showplace Square, and in particular the Transbay area and Rincon Hill. Conversely, for Inner Sunset, the largest addition come in projects of two to nine units and single family projects. For the city as a whole, roughly three out of every four units come in a relative small number of projects. This implies most areas of the city have 'modest' amounts of development, given its relative concentration.

By the same token, if we sum the units of the bottom half of all pipeline projects would contribute 3,500 units, or seven percent of the total number of pipeline units. Summing just the five neighborhoods with the biggest number of proposed units yields some 63 percent of all proposed development.

Perhaps except for Parkmerced, development in residentially zoned areas in the western part of the city is limited in scope and consists chiefly of small-scale in-fill projects. The majority of units, and the vast majority of projects are in buildings of 1, or 2 to 9 units.

Figure 4 on page 10 shows the residential pipeline by building size and pipeline status. The residential pipeline shows that:

- Of the 4,100 units with building permits approved or issued, five out of every eight units are in buildings of 250 units and above, underlin-

⁴ State projects are not subject to Planning Department review and is thus not a part of the standard permit stream this reports build on. The project was added manually to the construction list in early 2014.

ing the large scale of the near future cohorts of residential projects.

- Only three percent of the residential pipeline will be in buildings with nine units or less across all entitlement stages.
- Single family homes constitute a fraction of one percent of the total units in the pipeline.

Project Size and Status of Development

Per Figure 4 and Figure 5, there is some variation in project size by stage of development. Currently, a sizeable share of residential construction falls in the largest size category, reflecting in part that a significant number of large projects have been entitled for years and construction deferred during the Great Recession. Once economic conditions improved, these projects entered construction. The pattern on the non-residential side is somewhat less "top heavy," with bigger projects found in earlier stages of development, likely attributable to the focus on residential rather than commercial development in recent years.

Conversion of Commercial to Residential Use⁵

There are 50 projects in the current pipeline database proposing demolition or conversion of existing production, distribution and repair-use (PDR) buildings to residential use. The corresponding figure for the conversion of office space is 25 projects. These projects, adding up to 3,600 units and 2,900 units, respectively, comprise about one in seven of the total number of residential units in the pipeline.

Conversion of PDR Space

Table 5 provides a measure of how many units are produced relative to the lost PDR space.

- If the pipeline were developed as proposed, about 800,000 sq ft of PDR space would be lost to conversion or demolition.⁶ It would be replaced with residential units (3,600) and/or other commercial uses.

⁵ Numbers represented here differ from those reported in Table 1. Table 1 represents the net change of all projects whereas numbers here are limited to the specific projects representing conversions or demolitions resulting in a net loss of PDR space (Table 5) and office space (Table 6).

⁶ Table 5 shows only projects that include the conversion or loss of PDR space to residential use. Table 1 shows a net loss of 305,000 sq ft as it is a net tally of all projects that add, convert or demolish PDR space while this table only counts the loss side of the ledger.

Table 5. PDR Space Conversion to Residential Use, by Planning District

Neighborhood	Projects	Percent	Net Units	Percent	PDR Net	Percent
Central Waterfront	9	18%	1,080	30%	-293,700	35%
Showpl/Potrero	5	10%	600	17%	-176,000	21%
Downtown	4	8%	260	7%	-84,800	10%
Mission	10	20%	350	10%	-78,300	9%
Rincon Hill	2	4%	570	16%	-70,900	9%
East SoMa	11	22%	440	12%	-58,800	7%
Northeast	2	4%	120	3%	-20,800	3%
Market Octavia	1	2%	40	1%	-19,000	2%
WSoMa	3	6%	110	3%	-16,800	2%
India Basin	2	4%	10	0%	-8,600	1%
Richmond	1	2%	0	0%	-2,100	0%
Grand Total	50	100%	3,570	100%	-829,800	100%

Table 6. Office Space Conversion to Residential Use, by Planning District

Neighborhood	Projects	Percent	Net Units	Percent	Office Net	Percent
Downtown	4	16%	240	8%	-155,200	17%
East SoMa	1	4%	120	4%	-3,800	0%
Market Octavia	6	24%	1,380	47%	-611,200	66%
Mission	1	4%	0	0%	-1,000	0%
Northeast	4	16%	140	5%	-33,500	4%
Rincon Hill	2	8%	700	24%	-60,000	7%
Showpl/Potrero	2	8%	140	5%	-28,200	3%
South Central, Other	1	4%	0	0%	-1,900	0%
South of Market, Other	1	4%	210	7%	-20,800	2%
Western Addition	1	4%	0	0%	-2,500	0%
WSoMa	2	8%	10	0%	-2,400	0%
Grand Total	25	100%	2,940	100%	-920,400	100%

Notes:
Unit numbers are rounded to the nearest 10, while PDR numbers are rounded to the nearest hundred.

- Most of the PDR to residential conversions are found in Central Waterfront, Showplace Square / Potrero Hill, Downtown, Mission and Rincon Hill districts, accounting together for eight out of 10 converted square feet. The loss of PDR space in these neighborhoods would in turn bring in 2,900 net new housing units.

Conversion of Office Space

- Approximately 900,000 sq ft of office space is proposed to be converted to residential and/ or other commercial use. This loss of office

space is mainly taking place in the northeastern part of the city due to the concentration there. Table 6 shows that Market Octavia could see a loss of 600,000 square feet of office. This is predominantly due to the conversion of the Triple-A buildings to residential use. For the neighborhood as a whole, 1,400 new units could result from conversion.

- Nearly all units replacing office uses are in mid- to high-rise residential structures of 20 to 500 housing units in high density zoning districts. These projects are mostly concentrated in the eastern half of the city: Rincon Hill, East SoMa,

Showplace Square & Potrero Hill, Transbay, Mission and Downtown.

- These conversions of a number of *individual* office buildings reported here notwithstanding, taken together with other commercial developments in the pipeline as shown in Table 1, the overall result would still be a net addition of office space. As reported in Table 1, the net addition of office amounts to 11.6 million sq ft citywide.

INCLUSIONARY HOUSING

The San Francisco Planning Code § 415.5 contains the provisions for the Inclusionary Affordable Housing Program, requiring developments with 10 units or more to contribute to the development of housing affordable to middle-income households in the City.⁷ Project sponsors can mainly fulfill this requirement either by contributing to a fund, providing units on-site, dedicating land, or building on a different site.

The affordable housing pipeline can be thought of in stages: First, affordable housing production per the inclusionary program is a function of fees on market rate housing development and/or direct provision of affordable units. Such market rate development can be thought of as “parent projects,” leading to derived units now (on site) or later (through fees paid). The second stage, then, is when monies are pooled, ⁷ This data and section was last updated at the end of quarter 1, 2014.

Table 7. Inclusionary Housing Pipeline, by Type

Type	Declaration	Projects	Total Units	BMR On-Site	BMR Off-Site
Parent	On Site Provision	50	6,241	906	-
	In Lieu Fee	27	2,703	-	404 ¹
	Off site (Future BMR)	1	725	-	164
	Land Dedication	2	353	-	-
	Combination	8	6,706	370	36
	Undeclared	10	1,172	-	139 ²
Child	Stand-Alone BMR	3	203	-	-
Grand Total		101	18,103	1,276	743

Notes:
 /1/ BMR unit counts are estimated at 15% of the Total unit count, assumed to be off site.
 /2/ BMR unit counts are estimated at 12% of the Total unit count, assumed to be off site. Some of these may be on-site once a declaration is issued.

a site identified, and the affordable housing built, typically by a non-profit developer. To stay with the parent analogy, these downstream projects may accordingly be thought of as “children.” For economy of scale reasons, there are relatively few--currently three--such projects. Conversely, 50 projects (Table 7, first row) will provide on-site affordable units. These projects, along with the BMR stand-alone projects, are shown on Map 2.

Map 2. Inclusionary Affordable Housing Pipeline, By Type and Size

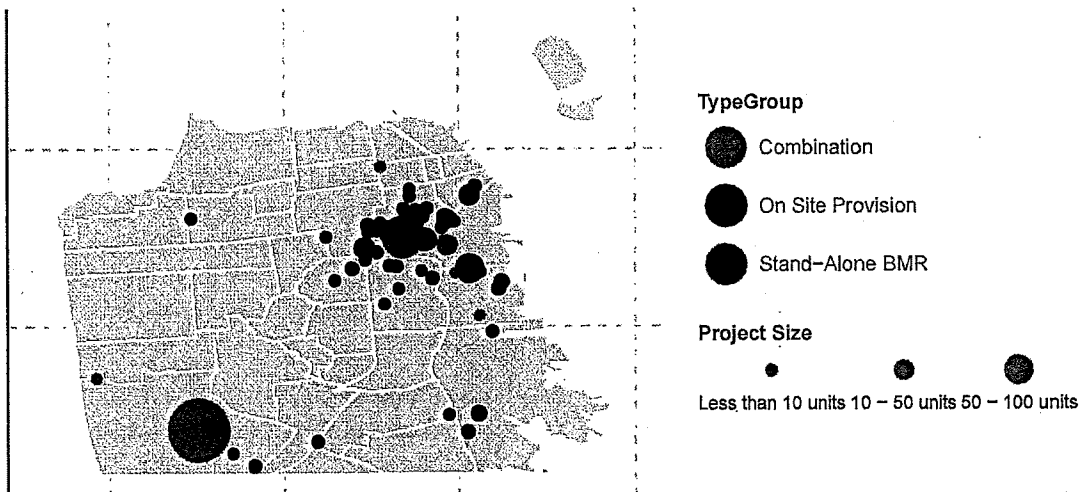
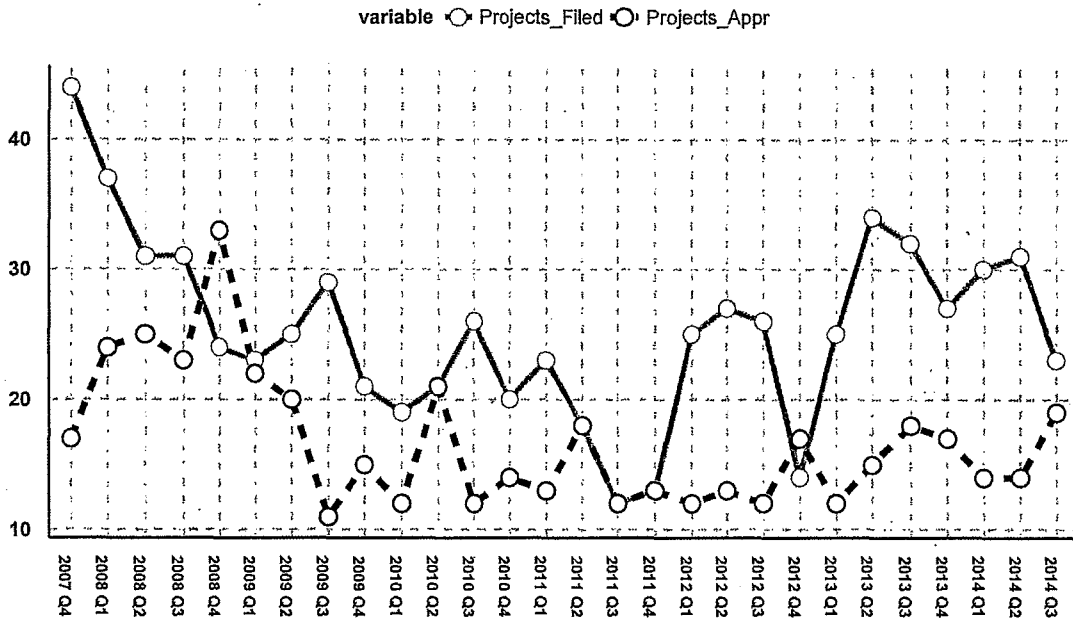


Figure 6. Pipeline Over Time: Projects Filed / Approved



RECENT ACTIVITY

Project Application Filings During q3 2014

A total of 24 planning applications were filed in the third quarter of 2014, down from last quarter, consistent with a seasonal slowdown. Corresponding to these 24 projects is a count of 250 residential units and 279,000 sq ft of non-residential development.

Projects approved during any given quarter shows a time lag relative to the projects filed curve. A project is often approved in another quarter than the one in which it was filed, particularly for projects needing environmental review and/or conditional use authorization, while others are abandoned altogether before approval. As such, nearly 800 units were entitled during the quarter.

A few of the larger projects filed during the third quarter of 2014 include:

- At 1095 Market Street, a proposal would change occupancy from office to hotel use, with 202 rooms, and add a new roof deck.

- At 230 7th Street, the proposed project would demolish a 14,230 sq ft single-story garage parking building and construct two new buildings with an at-grade inner court between the two buildings with an underground parking garage with 29 spaces. The new building along the 7th Street frontage would be a six-story building a small commercial space on the ground floor and 27 residential units. The building along Langton Street would be a four-story building containing 17 residential units.
- At 198 Valencia Street, sponsor would erect a five story, no basement, 28 unit residential condo building with ground floor commercial space.
- At 768 Harrison Street, the proposed project entails the demolition of an existing 2-story building and the construction of a new 9-story building with retail on the ground floor and mezzanine and residential uses above. The project would have 26 residential units and no off-street parking.

Completed projects during the past four quarters

Table 8 shows that the past four quarters resulted in a net addition of 3,090 units to the city's housing stock, while there was a net addition of 280,000 sq ft of non-residential space. The median time to completion for these projects from the first filing was 43 months. Projects less than 10,000 sq ft had a median completion time of 30 months. Such projects tend to be less complex than larger ones, as evidenced in completion times as sizes increase. The trend is broken down by zoning district in Figure 7: Particularly residential districts exhibit substantial variation in time to completion without much change in project size, suggesting other factors than size are at play.

Projects sized between 10,000 and 24,999 sq ft, 25,000 - 249,999 sq ft had median completion times of 52 and 71 months, respectively.

The largest group, sized 250,000 - 999,000 sq ft took 53 months from the initial filing to project completion.⁸ For some of the projects, the long completion times may well reflect a strong recession effect (project sponsors waiting due to financial uncer-

⁸ Certificates of Final Completions will occasionally lag the actual completion time and/or may be recorded on a different permit application finalizing work authorized per an older permit, so these figures should be taken as approximations.

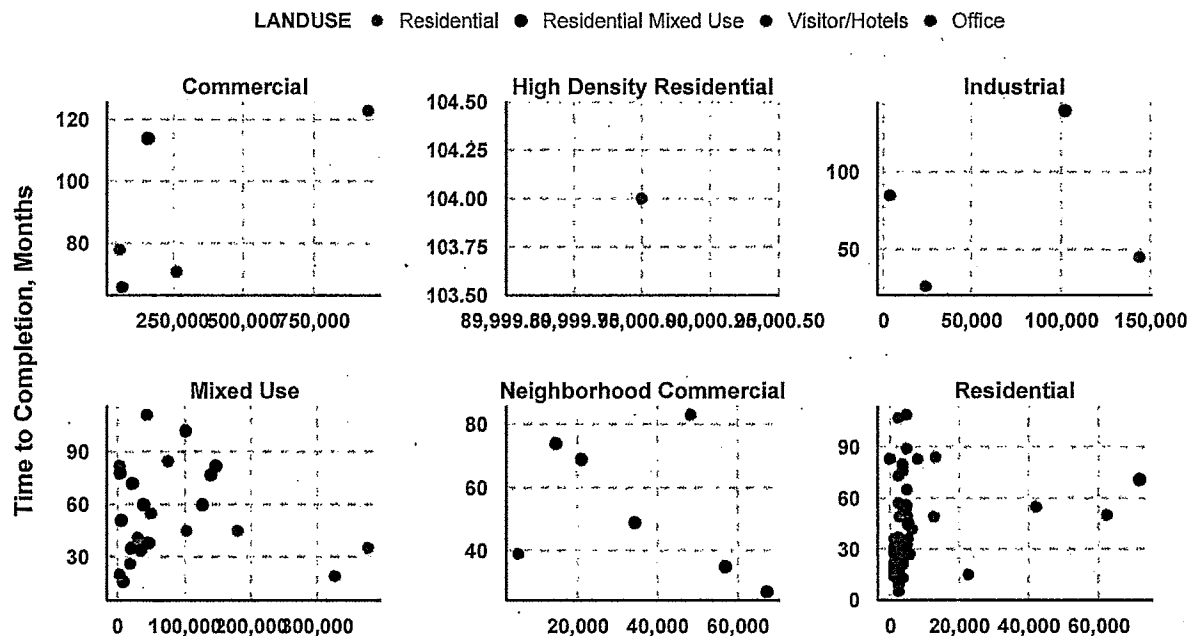
Table 8. Projects Completed Past Year, By Use Type

Land Use	Projects	Net Units	Net Comm'l Sq. Ft.
Mixres	21	1,200	-13,000
Resident	78	1,910	-72,000
MIPS	2	-20	309,000
Visitor	1	0	54,000
Grand Total	102	3,090	278,000

tainty) on the current completion cohort, although the smaller projects are by now predominantly filed after the slowdown ended. However, there is tremendous variation in how long it takes from conception to completion.

Figure 7 details the relationship between project size and time to completion. All other things equal, bigger, more complex projects can be expected to take longer to complete. They need more layers of review and refine, and financing may be more uncertain. The chart shows that this relationship is much stronger in some types of zoning districts than others. The association one might expect between project size and completion time, per this chart, is

Figure 7. Relation between Project Size and Months to Completion, By Zoning and Land Use



Map 3. Magnitude and Location of Past Year's Completed Development, by Major Land Use Type



not strongly borne out by the data for residential districts . The connection is a little stronger for mixed use projects, which may differ both in terms of the neighborhoods they are located in as well as the type of financing available. For projects in neighborhood commercial districts, the smaller projects took the longest to complete.

Map 4. Neighborhood Designation for Pipeline Report



Map 5. Generalized Zoning Districts



GENERALIZED ZONING DISTRICTS

Residential	Commercial
High Density Residential	Industrial
Mixed Use	Open Space
Neighborhood Commercial	Public

Map by AOlson, Tuesday, February 16, 2010 11:28:42 AM
I:\Citywide\Core Data\Pipeline\Updates\Updates 2007\Update 2007 Q1\Map\generalized zoning.r

DATA DICTIONARY

PROJECT LOCATION	
Block Lot	Concatenated 4-digit assessor block + 3-digit assessor's lot Numbers
Address	Name and address of project.
Planning Neighborhood	Areas related to current planning efforts and roughly to city neighborhoods.
PROJECT STATUS	
Under Construction	Project is under construction.
BP Approved	DBI approved building permit.
BP Issued	Project sponsor has picked up approved building permit (proxy measure of under construction)
BP Reinstated	DBI reinstates a lapsed building permit (lapses after 1 year with no activity).
BP Filed	Application for building permit filed with DBI.
PL Approved	All Planning actions approved.
PL Filed	Project application filed with the Planning Department
Bestdate	The date of the most recent action leading to the BESTSTAT value, i.e., a project's current pipeline status (e.g., date building permit application is filed if BESTSTAT = BP Filed).
DEVELOPMENT PROFILE	
Units	Net total dwelling units.
Net Comm'l Sq. Ft	Nonresidential gross square feet (GSF). Best interpreted as net new useable GSF with demolition of existing space subtracted (not total project gsf).
CIE	CIE or Cultural, Institutional, Educational includes educational services, social services, museums, zoos, and membership organizations.
MED	Medical includes health services offices and hospitals and laboratories throughout the City.
MIPS	MIPS is largely any activity where information is the chief commodity that is processed (managerial, information, professional, business services, multi-media).
PDR	PDR or Production, Distribution and Repair includes automobile and other repair services throughout the City, plus construction, transportation, communications, utilities, agriculture mining, manufacturing, wholesale trade, and motion picture production distribution, and services located outside of the downtown, transbay, and Northeast Districts. Does not include undeveloped or vacant land area used for PDR activities such as construction yards or open storage areas.
RETAIL/ENT	Retail Includes retail trade, amusement and recreation services, and personal services located throughout the City.
VISITOR	Visitor (or Hotel) includes hotels and other lodging located throughout the City.
Land Use	This field summarizes in one word what type of project is being proposed. Apart from the commercial categories listed, this field includes <ul style="list-style-type: none"> - Mixres (when both commercial and residential uses are proposed) - Mixed (when no residential use present and when multiple commercial uses are proposed and not one is dominating (>80% of commercial square feet)) - Resident is used to denote any residential project where there is no commercial component.

Quarter 3, 2014

Subset of pipeline where project adds either more than 10 units or 10,000 GSF

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
CONSTRUCTION							
3720001	TRANSBAY TOWER	TB Combo	1743k	0	MIPS	MIPS	6/25/2014
3746001	390 Main St	Rincon Hill	0k	669	Resident	--N/A--	9/30/2014
3735063	222 02ND ST	TB Combo	623k	0	MIPS	MIPS	9/29/2014
4154001	1001 POTRERO AV	Showpl/Potrero	419k	0	CIE	CIE	2/10/2014
3710017	350 MISSION ST	TB Combo	416k	0	MIPS	MIPS	9/23/2014
3747320	The Californian	Rincon Hill	-2k	452	Mixres	MIPS	8/7/2014
3738004	280 BEALE ST	TB Combo	0k	479	Resident	--N/A--	9/3/2014
0814020	100 VAN NESS AV	Market Octavia	-424k	399	Mixres	Retail/Ent	9/24/2014
3833002	1006 16TH ST	Showpl/Potrero	0k	393	Resident	--N/A--	9/30/2014
3749059	45 LANSING ST	Rincon Hill	-14k	320	Resident	--N/A--	9/18/2014
3765015	One Rincon Hill Phase II	Rincon Hill	0k	312	Resident	--N/A--	6/9/2014
3722367	151 THIRD ST	Downtown	67k		CIE	CIE	9/24/2014
3721122	535 MISSION ST	TB Combo	296k	0	MIPS	MIPS	9/12/2014
3732009	900 FOLSOM ST	East SoMa	6k	282	Mixres	Retail/Ent	8/8/2014
3701064	55 9TH ST	Downtown	0k	273	Resident	--N/A--	12/9/2013
8710007	718 LONG BRIDGE ST	Mission Bay	0k	263	Resident	--N/A--	9/30/2014
3717019	120 HOWARD ST	Downtown	67k	0	MIPS	MIPS	6/13/2012
0857001A	218 BUCHANAN ST	Market Octavia	0k	191	Resident	--N/A--	7/31/2014
3507039	1420 MISSION ST	Downtown	12k	190	Resident	--N/A--	9/10/2014
0831023	MARKET OCTAVIA - PARC	Market Octavia	4k	182	Mixres	Retail/Ent	9/29/2014
7331003	800 Brotherhood Way	Park Merced	0k	182	Resident	--N/A--	9/11/2012
3509043	104 9th Street	Downtown	-8k	160	Mixres	Retail/Ent	10/1/2014
0794028	555 FULTON ST	Market Octavia	0k	139	Resident	--N/A--	9/30/2014
0857001	55 Laguna Street	Market Octavia	28k	133	Mixres	Retail/Ent	7/31/2014
4991277	833-881 Jamestown	Candlestick	0k	14	Resident	--N/A--	9/17/2007
3510001	1415 MISSION ST	Downtown	0k	121	Mixres	MIPS	9/17/2014
5431A001	5800 03RD ST	BVHP Area A,B	13k	121	Resident	--N/A--	9/29/2014
0870003	100 BUCHANAN ST	Market Octavia	0k	116	Resident	--N/A--	9/30/2014

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3616007	2558 MISSION ST	Mission	0k	114	Resident	--N/A--	9/11/2014
3731003	226 06TH ST	East SoMa	5k	37	Mixres	Visitor	9/24/2014
1052024	2655 BUSH ST	Western Addition	-41k	81	Mixres	Retail/Ent	9/24/2014
3180001	50 PHELAN AV	Balboa Park	12k	71	Mixres	Retail/Ent	9/5/2014
0165021	235 BROADWAY	Northeast	5k	75	Mixres	Retail/Ent	9/19/2014
3789003	72 TOWNSEND ST	East SoMa	0k	74	Resident	--N/A--	9/11/2014
0671006	1450 FRANKLIN ST	Western Addition	-24k	69	Resident	--N/A--	3/4/2014
4591C042	101 DONAHUE ST	Candlestick	0k	63	Resident	--N/A--	9/30/2014
5281003	901 RANKIN ST	BVHP Area A,B	58k	0	PDR	PDR	9/17/2014
3788039	345 BRANNAN ST	East SoMa	53k	0	MIPS	MIPS	5/23/2014
0855011	8 OCTAVIA ST	Market Octavia	4k	49	Mixres	Retail/Ent	9/26/2014
3532091	245 VALENCIA ST	Market Octavia	13k	0	CIE	CIE	8/25/2014
3548032	1875 MISSION ST	Mission	-35k	39	Mixres	Retail/Ent	7/17/2014
3534069	25 DOLORES ST	Market Octavia	-19k	37	Resident	--N/A--	9/16/2014
0619012	1860 VAN NESS AV	Northeast	2k	35	Mixres	Retail/Ent	9/29/2014
4591C095	401 INNES AV	Other S Bayshore	0k	35	Resident	--N/A--	9/22/2014
4591C099	50 JERROLD AV	Other S Bayshore	0k	34	Resident	--N/A--	9/16/2014
0570011	1650 BROADWAY *	Marina	0k	34	Resident	--N/A--	9/11/2014
5943008	268 MADISON ST	South Central, Other	25k	1	Mixres	Retail/Ent	1/8/2014
3518006	248 - 252 09TH ST	WSoMa	5k	15	Mixres	MIPS	8/25/2014
7148040	ONE CAPITOL AV	Ingleside, Other	0k	28	Resident	--N/A--	9/4/2014
3752019	870 HARRISON ST	WSoMa	-6k	26	Mixres	Retail/Ent	6/3/2014
0527002	2559 VAN NESS AV	Marina	-2k	27	Resident	--N/A--	9/12/2014
4591C093	201 DONAHUE ST	Other S Bayshore	0k	25	Resident	--N/A--	9/30/2014
3596113	899 VALENCIA ST	Mission	5k	18	Mixres	Retail/Ent	9/18/2014
3548001	300 South Van Ness Ave	Mission	20k	0	Retail/Ent	Retail/Ent	9/25/2014
4591C094	201 FRIEDEL ST	HP Shipyard	0k	12	Resident	--N/A--	9/25/2014
4591C069	198 COLEMAN ST	HP Shipyard	0k	12	Resident	--N/A--	9/15/2014
4591C098	200 COLEMAN ST	HP Shipyard	0k	12	Resident	--N/A--	9/23/2014
7332005	700 BROTHERHOOD WY	Ingleside, Other	0k	11	Resident	--N/A--	6/25/2014
8724001	UCSF Medical Center	Mission Bay	1800k	0	MED	MED	10/13/2010
8719002	1351 03RD ST	Mission Bay	264k		MIPS	MIPS	8/6/2014

Friday, December 19, 2014

Quarter 3, 2014 List, Page 2 of 9

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3719010	181 FREMONT ST	TB Combo	493k	74	Mixres	MIPS	12/26/2013
3783001	801 BRANNAN ST	Showpl/Potrero	8k	557	Mixres	Retail/Ent	9/26/2014
3911001	1 HENRY ADAMS ST	Showpl/Potrero	15k	560	Resident	--N/A--	7/8/2014
3756003	350 08TH ST	WSoMa	57k	408	Mixres	Retail/Ent	3/20/2014
3833001	1000 16TH ST	Showpl/Potrero	0k	385	Resident	--N/A--	9/7/2012
8720016	1455 03RD ST	Mission Bay	381k	0	MIPS	MIPS	4/23/2010
3704071	949 Market Street	Downtown	237k	0	Retail/Ent	Retail/Ent	12/27/2012
3733008	250 4TH ST	South of Market, Other	73k	208	Mixres	Visitor	9/12/2014
8711019	701 LONG BRIDGE ST	Mission Bay	0k	188	Resident	--N/A--	3/26/2012
3732150	240 05TH ST	East SoMa	0k	182	Resident	--N/A--	8/27/2012
3794024	144 KING ST	East SoMa	44k	132	Mixres	Visitor	8/28/2014
3774026	270 BRANNAN ST	East SoMa	154k	0	MIPS	MIPS	4/25/2014
0811002	101 POLK ST	Downtown	1k	162	Mixres	Retail/Ent	4/7/2014
0785029	FWY PARCEL F	Market Octavia	64k	69	Mixres	CIE	11/26/2013
0785029	388 FULTON ST	Market Octavia	46k	69	Mixres	CIE	11/26/2013
0757025	1100 GOLDEN GATE AV	Western Addition	0k	98	Resident	--N/A--	6/26/2013
0757027	1239 TURK ST	Western Addition	0k	98	Resident	--N/A--	6/26/2013
3834001	1000 16TH ST	Showpl/Potrero	26k	65	Mixres	Retail/Ent	9/7/2012
1073013	800 PRESIDIO AV	Richmond	10k	50	Mixres	CIE	6/20/2014
3731001	200-214 6th St	East SoMa	3k	67	Mixres	Retail/Ent	1/30/2014
0808039	450 HAYES STREET	Market Octavia	3k	41	Mixres	Retail/Ent	7/18/2014
3560001	2210 MARKET ST	Market Octavia	2k	22	Mixres	Retail/Ent	3/14/2012
0028014	1255- 1275 COLUMBUS A	Northeast	-9k	20	Mixres	Retail/Ent	4/22/2014
3732071	468 CLEMENTINA ST	East SoMa	-0k	25	Resident	--N/A--	10/23/2013
0512026	2347 LOMBARD ST	Marina	0k	21	Resident	--N/A--	7/25/2014
5457037	2895 SAN BRUNO AV	South Central, Other	11k	10	Mixres	MIPS	8/19/2013
1051034	2320 SUTTER ST	Western Addition	11k	0	MED	MED	5/28/2014
3547027	80 JULIAN AV	Mission	13k	7	Mixres	CIE	10/27/2011
3617008	1050 VALENCIA ST	Mission	0k	15	Mixres	Retail/Ent	7/17/2013
3987010	140 PENNSYLVANIA AV	Showpl/Potrero	0k	12	Resident	--N/A--	8/6/2014

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
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BP REINSTATED

0269028	350 BUSH ST	Downtown	347k	0	MIPS	MIPS	12/30/2013
3973002C	480 POTRERO AV	Mission	0k	77	Resident	--N/A--	5/23/2014

BP APPROVED

4884025	2600 ARELIIOUS WALKER	BVHP Area A,B	0k	93	Resident	--N/A--	8/21/2014
6969001	5050 MISSION ST	South Central, Other	7k	61	Mixres	Retail/Ent	3/13/2014
6969011	5050 MISSION ST	South Central, Other	0k	61	Resident	--N/A--	3/13/2014
0258033	500 PINE ST	Downtown	57k		MIPS	MIPS	4/7/2014
4224015	1004 MISSISSIPPI ST	Showpl/Potrero	0k	28	Resident	--N/A--	1/16/2009
0101004	1741 POWELL ST	Northeast	-12k	18	Mixres	Retail/Ent	11/2/2012

BP Filed

0694005	CPMC Hosp Van Ness	Downtown	702k	0	Mixed	CIE	4/20/2012
3736078A	57 TEHAMA ST	TB Combo	0k	418	Resident	--N/A--	4/30/2014
3748006	340 FREMONT ST	Rincon Hill	-43k	384	Mixres	Retail/Ent	8/3/2012
3553052	1979 MISSION ST	Mission	0k	351	Resident	--N/A--	12/17/2013
4172022	1201-1225 TENNESSEE ST	Central Waterfront	-140k	259	Mixres	Retail/Ent	12/23/2013
3703059	1095 MARKET ST	Downtown	0k	202	Resident	--N/A--	9/11/2014
0283004A	620 SUTTER ST	Downtown	-46k	65	Mixres	Visitor	1/23/2013
3753106	923 FOLSOM STREET	East SoMa	-2k	115	Mixres	Retail/Ent	11/20/2013
0667016	1545 PINE ST	Northeast	-23k	107	Mixres	Retail/Ent	12/3/2013
4045003	2171 THIRD ST	Central Waterfront	-21k	109	Mixres	Retail/Ent	6/21/2013
4041009	630 INDIANA ST	Central Waterfront	0k	111	Resident	--N/A--	12/24/2013
4991600	101 EXECUTIVE PARK BL	Executive Park	0k	12	Resident	--N/A--	10/25/2010
0836007	1554 MARKET ST	Market Octavia	0k	110	Resident	--N/A--	11/22/2013
4102026	1300 22nd Street	Showpl/Potrero	-30k	94	Resident	--N/A--	12/9/2013
3542039	2198 MARKET ST	Market Octavia	5k	87	Mixres	Retail/Ent	12/13/2013
0346003A	101 HYDE ST	Downtown	-1k	85	Mixres	Retail/Ent	6/27/2013
4352007	1301 CESAR CHAVEZ ST	BVHP Area A,B	82k	0	MIPS	MIPS	10/15/2007

Friday, December 19, 2014

Quarter 3, 2014 List, Page 4 of 9

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3553008	490 SOUTH VAN NESS AV	Mission	-1k	84	Mixres	Retail/Ent	10/5/2010
4059009	2298 O3RD ST	Central Waterfront	14k	69	Mixres	Retail/Ent	9/25/2013
0629037	2155 WEBSTER ST	Marina	0k	77	Resident	--N/A--	11/22/2013
3962008	346 POTRERO AVENUE	Mission	3k	72	Mixres	Retail/Ent	11/20/2013
4059001A	815 TENNESSEE STREET	Central Waterfront	-32k	69	Resident	--N/A--	5/5/2014
3736085	48 TEHAMA ST	TB Combo	0k	66	Resident	--N/A--	7/12/2006
0165022	717 BATTERY ST	Northeast	28k	0	MIPS	MIPS	12/1/2008
2515001	2800 SLOAT BL	Outer Sunset	10k	56	Resident	--N/A--	2/4/2014
3703086	570 JESSIE ST	Downtown	-15k	47	Resident	--N/A--	2/2/2006
0837003	1 FRANKLIN ST	Market Octavia	2k	35	Mixres	Retail/Ent	12/3/2009
3774072	85 FEDERAL ST	East SoMa	26k	0	MIPS	MIPS	6/20/2013
4792029	1212 THOMAS AV	BVHP Area A,B	30k	0	PDR	PDR	7/23/2008
3727168	1145 MISSION ST	Downtown	4k	25	Mixres	Retail/Ent	6/9/2006
0807010	580 HAYES ST	Market Octavia	0k	29	Resident	--N/A--	12/9/2013
6944044	270 BRIGHTON AV	Ingleside, Other	4k	25	Mixres	Retail/Ent	8/30/2013
3502108	198 VALENCIA ST	Market Octavia	0k	28	Resident	--N/A--	8/5/2014
0512025	2353 LOMBARD ST	Marina	1k	21	Mixres	Retail/Ent	7/29/2010
2623006	376 CASTRO ST	Buena Vista	2k	24	Mixres	Retail/Ent	5/17/2013
3549064	1450 15TH ST	Mission	-6k	23	Resident	--N/A--	6/28/2013
3753096	233 SHIPLEY ST	East SoMa	0k	22	Resident	--N/A--	1/24/2014
1368049	4614 CALIFORNIA ST	Richmond	14k	0	Mixed	MIPS	1/23/2007
3546026	449 14th street	Market Octavia	0k	20	Resident	--N/A--	3/17/2014
0832026	360 OCTAVIA ST	Market Octavia	1k	16	Mixres	Retail/Ent	10/1/2008
3821007	1150 16th Street	Showpl/Potrero	1k	15	Mixres	Retail/Ent	7/22/2011
0832025	300 OCTAVIA ST	Market Octavia	0k	16	Resident	--N/A--	10/1/2008
3576090	3420 18TH ST	Mission	-4k	16	Resident	--N/A--	11/4/2013
3511015	1532 HOWARD ST	WSoMa	-1k	15	Resident	--N/A--	5/30/2014
1084001B	1 Stanyan Street	Richmond	-2k	13	Mixres	Retail/Ent	12/14/2007
3557062	200 DOLORES ST	Market Octavia	-8k	13	Resident	--N/A--	8/19/2008
3197010	1446 OCEAN AV	Balboa Park	-2k	13	Resident	--N/A--	10/31/2008
0843016	690 PAGE ST	Buena Vista	-2k	12	Resident	--N/A--	5/21/2013
0937029	2419 LOMBARD ST	Marina	0k	11	Resident	--N/A--	4/3/2014

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
6044007	450 SOMERSET ST	South Central, Other	21k		CIE	CIE	8/11/2014

PL APPROVED

4886008	Bayview Waterfront	Candlestick	4110k	10,237	Mixres	MIPS	8/3/2010
7303001	Parkmerced	Park Merced	478k	5,677	Mixres	Retail/Ent	5/25/2011
1939001	Treasure Island	Treasure Island	381k	7,800	Mixres	Retail/Ent	3/15/2011
6575001	CPMC - ST. LUKE'S HOSPIT	Bernal Heights	165k	0	Mixed	CIE	7/11/2013
5262004	2095 Jerrold Ave	BVHP Area A,B	128k		PDR	PDR	3/26/2010
3736074	41 TEHAMA ST	TB Combo	0k	398	Resident	--N/A--	11/14/2013
3706093	706 MISSION ST	Downtown	26k	185	Mixres	Retail/Ent	7/31/2013
3799001	601 TOWNSEND ST	Showpl/Potrero	73k	0	MIPS	MIPS	5/10/2012
0813007	1390 MARKET ST	Market Octavia	-2k	230	Mixres	Retail/Ent	5/28/2009
0201012	8 Washington Street	Northeast	32k	170	Mixres	Retail/Ent	6/19/2012
5431A043	5800 O3RD ST	BVHP Area A,B	0k	188	Resident	--N/A--	10/25/2012
0331010	168 EDDY ST	Downtown	15k	170	Mixres	Retail/Ent	3/26/2009
0238002	300 CALIFORNIA ST	Downtown	59k	0	MIPS	MIPS	12/5/2013
3788042	333 BRANNAN ST (aka 32	East SoMa	162k	0	MIPS	MIPS	8/15/2013
0794015	746 LAGUNA ST	Market Octavia	2k	136	Mixres	MIPS	5/13/2010
0192014	Chinese Hospital	Northeast	68k	0	CIE	CIE	7/12/2012
0250001	1401 CALIFORNIA ST	Northeast	-19k	95	Mixres	Retail/Ent	12/15/2011
3747012	325 FREMONT ST	Rincon Hill	0k	119	Resident	--N/A--	7/17/2014
3767305	429 BEALE ST	Rincon Hill	-36k	113	Resident	--N/A--	5/14/2009
0340002	19-25 MASON ST & 2-16 T	Downtown	3k	110	Mixres	Retail/Ent	3/4/2014
4060001	888 TENNESSEE ST	Central Waterfront	-36k	110	Mixres	Retail/Ent	10/16/2013
3994001C	650 ILLINOIS ST	Central Waterfront	-15k	97	Resident	--N/A--	6/5/2014
3753081	345 06TH ST	East SoMa	7k	89	Mixres	Retail/Ent	5/1/2014
3753079	363 06TH ST	East SoMa	-10k	87	Mixres	Retail/Ent	10/3/2012
3753122	301 06TH ST	East SoMa	4k	84	Mixres	Retail/Ent	7/2/2013
3703079	1036-1040 MISSION ST	Downtown	1k	83	Mixres	Retail/Ent	6/26/2014
0327011	72 ELLIS ST	Downtown	79k		Visitor	Visitor	3/25/2010
0629016	2155 Webster Street	Marina	0k	77	Resident	--N/A--	5/1/2013
3703012	527 STEVENSON ST	Downtown	-44k	67	Mixres	Retail/Ent	1/10/2014

Friday, December 19, 2014

Quarter 3, 2014 List, Page 6 of 9

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0619009	1800 Van Ness Ave.	Northeast	-1k	62	Mixres	Retail/Ent	10/20/2011
0287013	300 Grant Ave.	Downtown	-20k	45	Mixres	Retail/Ent	10/6/2011
3753008	374 5TH ST	East SoMa	0k	47	Resident	--N/A--	12/20/2010
3785003	690 05TH ST	WSoMa	32k	0	Visitor	Visitor	6/17/2009
3980008	1717 17TH ST	Showpl/Potrero	-13k	41	Mixres	PDR	7/15/2010
1029003	2901 California St	Western Addition	16k	-3	CIE	CIE	6/16/2009
3726103	114 07th Street	Downtown	-30k	39	Mixres	Retail/Ent	6/19/2014
1450008	5400 GEARY BL	Richmond	-11k	39	Mixres	Retail/Ent	4/25/2013
0570010	1622 BROADWAY	Marina	0k	34	Resident	--N/A--	3/12/2009
2636025	Crestmont Drive	Inner Sunset	0k	34	Resident	--N/A--	3/7/2013
0522002A	2601 VAN NESS AV	Marina	7k	26	Mixres	Retail/Ent	5/13/2014
0670024	1433 BUSH ST	Downtown	-4k	26	Mixres	Retail/Ent	7/31/2014
0281003	832 SUTTER ST	Downtown	1k	27	Mixres	Retail/Ent	2/27/2014
0620006	1601 LARKIN ST	Northeast	0k	28	Resident	--N/A--	11/15/2013
3751033	768 HARRISON ST	East SoMa	2k	26	Mixres	Retail/Ent	3/21/2014
3778047	610-620 Brannan Street	Showpl/Potrero	527k		MIPS	MIPS	6/14/2014

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9900048	Seawall Lot 337	South of Market, Other	1950k	1,500	Mixres	MIPS	4/23/2013
3708006	50 01ST ST	TB Combo	1704k	292	Mixres	MIPS	6/4/2014
6310001	Sunnydale Hope SF	South Central, Other	59k	915	Mixres	Retail/Ent	4/28/2010
4167004	Potrero Hope SF	Showpl/Potrero	30k	1,094	Mixres	Retail/Ent	6/30/2010
3777045	598 BRANNAN STREET	WSoMa	662k	0	MIPS	MIPS	8/23/2012
0342001	950 MARKET ST	Downtown	170k	305	Mixres	Visitor	11/19/2013
0244001	950 MASON STREET	Northeast	-295k	160	Mixres	Visitor	2/11/2009
0814001	150 VAN NESS AVE	Market Octavia	-128k	429	Mixres	Retail/Ent	4/23/2014
3949001	1200 17TH STREET	Showpl/Potrero	66k	200	Mixres	MIPS	4/4/2012
4105009	800 INDIANA STREET	Central Waterfront	-78k	340	Resident	--N/A--	10/10/2013
0350003	1066 MARKET ST	Downtown	-1k	304	Mixres	Retail/Ent	6/18/2014
3954016	1301 - 16TH STREET	Showpl/Potrero	-39k	276	Resident	--N/A--	9/16/2013
0647007	1634-1690 PINE ST	Western Addition	7k	260	Mixres	Retail/Ent	7/17/2012
4167011	1395 22nd St	Showpl/Potrero	0k	251	Resident	--N/A--	1/13/2014

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0836002	1540 MARKET ST	Market Octavia	-13k	180	Mixres	Retail/Ent	2/27/2009
3741031	75 HOWARD ST	South of Market, Other	18k	186	Mixres	Retail/Ent	1/13/2012
0350002	1028 MARKET ST	Downtown	10k	186	Mixres	Retail/Ent	4/29/2014
4022001	2070 BRYANT ST	Mission	-50k	177	Resident	--N/A--	6/12/2014
3507042	1400 MISSION ST	Downtown	4k	165	Mixres	Retail/Ent	4/8/2009
3702047	1125 MARKET ST	Downtown	3k	164	Mixres	Retail/Ent	12/18/2013
3786038	501-505 BRANNAN	East SoMa	134k	0	MIPS	MIPS	5/20/2013
3730015	1140 FOLSOM STREET	WSoMa	-9k	128	Mixres	Retail/Ent	10/16/2013
3728019	1298 HOWARD STREET	WSoMa	10k	121	Mixres	MIPS	3/19/2014
5231002B	1995 EVANS AV	BVHP Area A,B	65k	0	MIPS	MIPS	3/21/2013
3703062	1075 MARKET ST	Downtown	-16k	90	Mixres	Retail/Ent	2/12/2014
3751029	750 HARRISON ST	East SoMa	-2k	77	Mixres	Retail/Ent	9/17/2013
3774071	77 & 85 FEDERAL STREET	East SoMa	55k	0	Mixed	MIPS	3/26/2013
3519063	1335 FOLSOM ST	WSoMa	-6k	65	Resident	--N/A--	12/3/2013
4044013	777 TENNESSEE STREET	Central Waterfront	-16k	59	Resident	--N/A--	5/30/2013
0318020	651 GEARY ST	Downtown	-8k	46	Mixres	Retail/Ent	2/25/2013
3730023	1174 FOLSOM ST	WSoMa	10k	42	Mixres	MIPS	7/29/2013
0744002	807 FRANKLIN ST	Western Addition	0k	50	Resident	--N/A--	4/8/2014
5696036	992 PERALTA AV	Bernal Heights	0k	50	Resident	--N/A--	6/20/2013
3730004	230 07TH ST	East SoMa	0k	44	Mixres	Retail/Ent	7/30/2014
0855016	1700 MARKET ST	Market Octavia	-2k	42	Mixres	Retail/Ent	7/2/2014
3115043	625 MONTEREY BL	Ingleside, Other	21k	0	Retail/Ent	Retail/Ent	5/26/2010
4059001C	2230 3RD STREET	Central Waterfront	-3k	37	Mixres	Retail/Ent	3/6/2014
4108017	901 TENNESSEE STREET	Central Waterfront	-9k	39	Resident	--N/A--	9/12/2013
0166003	240 PACIFIC AV	Northeast	1k	31	Mixres	Retail/Ent	8/27/2014
0836011	22 FRANKLIN ST	Market Octavia	4k	28	Mixres	Retail/Ent	1/2/2014
5992A060	495 CAMBRIDGE ST	South Central, Other	-23k	32	Resident	--N/A--	5/15/2014
3576001	2100 MISSION ST	Mission	-5k	29	Mixres	Retail/Ent	9/21/2009
0337014A	469 EDDY ST	Downtown	-18k	29	Mixres	Retail/Ent	8/28/2014
3575070	600 SOUTH VAN NESS AV	Mission	1k	27	Mixres	Retail/Ent	9/10/2013
0194009	740 WASHINGTON ST	Northeast	-8k	23	Mixres	Retail/Ent	9/26/2014
3753095	233-237 SHIPLEY ST	East SoMa	-2k	22	Resident	--N/A--	7/10/2013

Friday, December 19, 2014

Quarter 3, 2014 List, Page 8 of 9

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0041001	311 BAY ST	Northeast	-2k	17	Mixres	Retail/Ent	6/16/2014
3995007	600 18TH STREET	Central Waterfront	1k	18	Mixres	Retail/Ent	9/30/2014
0645003	1335 LARKIN ST	Northeast	0k	20	Resident	--N/A--	7/23/2014
3639001	2600 HARRISON ST	Mission	0k	20	Resident	--N/A--	6/20/2014
3753140	935 FOLSOM ST	East SoMa	-14k	69	Mixres	Retail/Ent	4/19/2010
4008002	540 DE HARO ST	Showpl/Potrero	-7k	17	Resident	--N/A--	7/3/2014
0506036	1727 LOMBARD ST	Marina	-16k	14	Resident	--N/A--	1/31/2012
3526005	520 9TH STREET	Showpl/Potrero	0k	12	Resident	--N/A--	8/21/2013
3521005	340 11TH ST	WSoMa	16k		Mixed	MIPS	9/5/2014
3784007	510 TOWNSEND ST	WSoMa	255k		MIPS	MIPS	8/8/2014
3703066	1053 MARKET ST	Downtown	66k		Visitor	Visitor	6/16/2014
3913005	155 DE HARO STREET	Showpl/Potrero	15k	0	PDR	PDR	8/15/2014

ACKNOWLEDGEMENTS

Mayor

Edwin M. Lee

Board of Supervisors

David Chiu, *President*

John Avalos

London Breed

David Campos

Malia Cohen

Mark Farrell

Jane Kim

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Katy Tang

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John Rahaim, *Planning Director*

Gil Kelly, *Director, Citywide Planning Division*

Joshua Switzky, *Acting Director of Citywide Planning*

Teresa Ojeda, *Manager, Information and Analysis Group*

Aksel Olsen, *Project Manager*

Alton Chinn, *Programmer Analyst*

Gary Chen, *Graphic Design*

Mayor's Office of Housing and Community Development

Chandra Egan, *Inclusionary Housing Program Manager*

Department of Building Inspections

Hemalatha Nekkanti, *Development Division Manager*



**SAN FRANCISCO
PLANNING
DEPARTMENT**

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Print Form

Introduction Form

By a Member of the Board of Supervisors or the Mayor

Time stamp
or meeting date

I hereby submit the following item for introduction (select only one):

- 1. For reference to Committee. (An Ordinance, Resolution, Motion, or Charter Amendment)
- 2. Request for next printed agenda Without Reference to Committee.
- 3. Request for hearing on a subject matter at Committee.
- 4. Request for letter beginning "Supervisor [] inquires"
- 5. City Attorney request.
- 6. Call File No. [] from Committee.
- 7. Budget Analyst request (attach written motion).
- 8. Substitute Legislation File No. []
- 9. Reactivate File No. []
- 10. Question(s) submitted for Mayoral Appearance before the BOS on []

RECEIVED
 BOARD OF SUPERVISORS
 SAN FRANCISCO
 JUN 20 PM 4:24
 10

Please check the appropriate boxes. The proposed legislation should be forwarded to the following:

- Small Business Commission Youth Commission Ethics Commission
- Planning Commission Building Inspection Commission

Note: For the Imperative Agenda (a resolution not on the printed agenda), use a Imperative Form.

Sponsor(s):

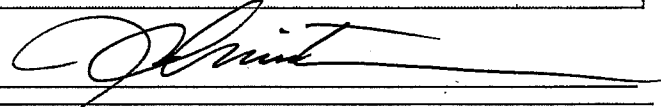
Supervisor: Christensen, Cohen, Farrell

Subject:

Supporting California Senate Bill 364 (Leno) - Amendments to State Law to Return Local Control over the Ellis Act

The text is listed below or attached:

Resolution supporting California Senate Bill 364, introduced by Senator Leno, amending State law to return local control over the Ellis Act to prevent real estate speculation and abuse of no-fault evictions.

Signature of Sponsoring Supervisor: 

For Clerk's Use Only: