

File No. 150748

Committee Item No. 7

Board Item No. _____

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee: Land Use and Transportation

Date October 19, 2015

Board of Supervisors Meeting

Date _____

Cmte Board

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| <input type="checkbox"/> | <input type="checkbox"/> | Motion |
| <input type="checkbox"/> | <input type="checkbox"/> | Resolution |
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| <input type="checkbox"/> | <input type="checkbox"/> | Legislative Digest |
| <input type="checkbox"/> | <input type="checkbox"/> | Budget and Legislative Analyst Report |
| <input type="checkbox"/> | <input type="checkbox"/> | Youth Commission Report |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Introduction Form |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Department/Agency Cover Letter and/or Report |
| <input type="checkbox"/> | <input type="checkbox"/> | Memorandum of Understanding (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"/> | Form 126 - Ethics Commission |
| <input type="checkbox"/> | <input type="checkbox"/> | Award Letter |
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| <input type="checkbox"/> | <input type="checkbox"/> | Vacancy Notice |
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| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <u>Housing Balance Report, dtd 9/4/15</u> |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <u>Housing Balance Report, dtd 7/7/15</u> |
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Completed by: Alisa Somera Date October 16, 2015

Completed by: _____ Date _____



SAN FRANCISCO PLANNING DEPARTMENT

150763-150748
RECEIVED VIA EMAIL
9/8/2015

MEMO

DATE: 4 September 2015
TO: Members, San Francisco Board of Supervisors
FROM: John Rahaim
Director of Planning
RE: HOUSING BALANCE REPORT

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SUMMARY

This report is submitted in compliance with the recently passed Ordinance No. 53-15 requiring the Planning Department to monitor and report on the housing balance between new market rate and new affordable housing production. The "Housing Balance" is defined as the proportion of all new affordable housing units to the total number of all new housing units for a 10-year "Housing Balance Period." This report is the second in the series and covers the ten-year period from July 2005 through June 2015.

One of the stated purposes of the Housing Balance is "to ensure that data on meeting affordable housing targets City-wide and within neighborhoods informs the approval process for new housing development." In November 2014, San Francisco's voters endorsed Proposition K, which set a goal of 33% of all new housing units to be affordable. Housing production targets in the City's Housing Element adopted in April 2015 includes 28,870 new units to be built between 2015 and 2022, 57% of which should be affordable. Twenty-eight percent (28%) of net new housing produced in this ten-year reporting period were affordable.

The ordinance requires that the Housing Balance be provided using two calculations: a) "Cumulative Housing Balance" consisting of net housing built within a 10 year Housing Balance period, acquisition and substantial rehabilitation of affordable units, projects that have received both approvals from the Planning Commission or Planning Department and site permits from the Department of Building Inspection, and units withdrawn from protected status; and b) "Projected Housing Balance" which includes residential projects that have received approvals from the Planning Commission or Planning Department but have not yet received permits to commence construction.

The Citywide Cumulative Housing Balance for the 2005 Q3 -2015 Q2 Housing Balance Period is 15%, although this varies by districts. Distribution of the Cumulative Housing Balance over the 11 Board of Supervisor Districts ranges from -189% (District 4) to 40% (District 5). This variation, especially with negative housing balances, is due to the larger number of units withdrawn from protection such as rent control relative to the number of total net new units and net affordable units built in specific districts.

The Projected Housing Balance Citywide is 11%. Three major development projects were identified in the ordinance for exclusion in the projected housing balance calculations until site permits are obtained. These three projects add up to 23,700 net units, with over 5,170 affordable units; would increase the projected housing balance to 20% if included in the calculations.

It should be noted that this second *Housing Balance Report* adjusted the calculations to conform to the ordinance's exact requirements. The Cumulative Housing Balance in the first *Housing Balance Report*, for example, included planned RAD public housing unit replacements that have yet to be completed. Removing these units from the calculation reduces the first Housing Balance from 21% to 14%.

BACKGROUND

On 21 April 2015, the Board of Supervisors passed Ordinance No. 53-15 amending the Planning Code to include a new Section 103 requiring the Planning Department to monitor and report on the Housing Balance between new market rate housing and new affordable housing production. The Housing Balance Report will be submitted bi-annually by March 1 and September 1 of each year and will also be published on a visible and accessible page on the Planning Department's website. Section 103 also requires an annual hearing at the Board of Supervisors on strategies for achieving and maintaining the required housing balance in accordance with the City's housing production goals. The ordinance also instructed the Planning Department to produce the first report by 1 June 2015.

The stated purposes for the Housing Balance Monitoring and Reporting are: a) to maintain a balance between new affordable and market rate housing Citywide and within neighborhoods; b) to make housing available for all income levels and housing need types; c) to preserve the mixed-income character of the City and its neighborhoods; d) to offset the withdrawal of existing housing units from rent stabilization and the loss of single-room occupancy hotel units; e) to ensure the availability of land and encourage the deployment of resources to provide sufficient housing affordable to households of very low, low, and moderate incomes; f) to ensure adequate housing for families, seniors and the disabled communities; g) to ensure that data on meeting affordable housing targets Citywide and within neighborhoods informs the approval process for new housing development; and h) to enable public participation in determining the appropriate mix of new housing approvals.

Specifically, the Housing Balance Report will track performance toward meeting the goals set by Proposition K and the City's Housing Element. On November 2014, San Francisco's voters endorsed Proposition K, which set a goal of 33% of all new housing units to be affordable. Housing production targets in the City's Housing Element adopted in April 2015 includes 28,870 new units built between 2015 and 2022, 57% of which should be affordable.

This report was prepared from information from previously published sources including the Planning Department's annual *Housing Inventory* and quarterly *Pipeline Report* data, San Francisco Rent Board data, and the Mayor's Office of Housing and Community Development's *Weekly Dashboard*.

CUMULATIVE HOUSING BALANCE CALCULATION

Section 103 states that the Housing Balance "be expressed as a percentage, obtained by dividing the cumulative total of extremely low, very low, low, and moderate income affordable housing (all units 0-120% AMI) minus the lost protected units, by the total number of net new housing units with the Housing Balance Period." "Protected units" include units that are subject to rent control under the City's Residential Rent Stabilization and Arbitration Ordinance. Additional elements that figure into the Housing Balance include completed HOPE SF and RAD public housing replacement, substantially rehabilitated units, and single-room occupancy hotel units (SROs).

$$\begin{array}{r}
 \text{[Net New Affordable Housing +} \\
 \text{Completed Acquisitions \& Rehabs + Completed} \\
 \text{HOPE SF + RAD Public Housing Replacement +} \\
 \text{Entitled \& Permitted Affordable Units]} \\
 \text{– [Units Removed from Protected Status]} \\
 \hline
 \text{[Net New Housing Built + Net Entitled \& Permitted Units]}
 \end{array}
 =
 \begin{array}{l}
 \text{CUMULATIVE} \\
 \text{HOUSING} \\
 \text{BALANCE}
 \end{array}$$

The "Housing Balance Period" is a ten-year period starting with the first quarter of 2005 through the last quarter of 2014. Subsequent housing balance reports will cover the 10 years preceding the most recent quarter. This report covers July 2005 (Q3) through June 2015 (Q2).

Table 1 below shows the Cumulative Housing Balance for 2005 Q3 – 2015 Q2 is 15% Citywide. Housing Balances for Board of Supervisor Districts range from -812% (District 4) to 40% (District 5). Districts 5, 6 and 10 have positive housing balances (40%, 25% and 20%). Negative balances in several districts – which range from -1% in District 9 to -189% in District 4 – resulted from the larger numbers of units removed from protected status relative to the net new affordable housing and net new housing units built. Net loss of affordable housing units in District 11 equaled the number of net new units built and total entitled and permitted units, resulting in a -100% housing balance.

Table 1
Cumulative Housing Balance Calculation

| BoS Districts | Net New Affordable Housing Built | Completed Acquisitions & Rehabs | Units Removed from Protected Status | Entitled Affordable Units Permitted | Total Net New Units Built | Total Entitled Units | Housing Balance |
|---------------|----------------------------------|---------------------------------|-------------------------------------|-------------------------------------|---------------------------|----------------------|-----------------|
| BoS D1 | 278 | - | (463) | 4 | 393 | 92 | -37.3% |
| BoS D2 | 50 | 24 | (413) | 40 | 365 | 603 | -30.9% |
| BoS D3 | 350 | 72 | (524) | 15 | 1,382 | 109 | -5.8% |
| BoS D4 | 30 | - | (389) | 1 | 106 | 83 | -189.4% |
| BoS D5 | 631 | 430 | (478) | 217 | 1,264 | 733 | 40.1% |
| BoS D6 | 3,414 | 1,014 | (216) | 424 | 14,064 | 4,765 | 24.6% |
| BoS D7 | 118 | - | (205) | - | 358 | 240 | -14.5% |
| BoS D8 | 407 | - | (699) | 170 | 1,041 | 625 | -7.3% |
| BoS D9 | 269 | 319 | (630) | 26 | 1,179 | 296 | -1.1% |
| BoS D10 | 717 | - | (214) | 418 | 2,325 | 2,309 | 19.9% |
| BoS D11 | 30 | - | (297) | 13 | 128 | 126 | -100.0% |
| TOTALS | 6,294 | 1,859 | (4,528) | 1,328 | 22,605 | 9,981 | 15.2% |

CUMULATIVE HOUSING BALANCE ELEMENTS

Because the scope covered by the Housing Balance calculation is broad, each element – or group of elements – will be discussed separately. The body of this report will account for figures at the Board of Supervisor district level. The breakdown of each element using the Planning Department District geographies as required by Section 103 is provided separately in an Appendix. This is to ensure simple and uncluttered tables.

Affordable Housing and Net New Housing Production

Table 2 below shows housing production between 2005 Q3 and 2015 Q2. This ten-year period resulted in a net addition of 22,650 units to the City's housing stock, including 6,250 affordable units. Over 14,060 (62%) of net new housing and over 3,400 (56%) of affordable housing built in the ten year reporting period were in District 6. District 10 follows with almost 2,370 (11%) net new units, including 670 (11%) affordable units.

The table below also shows that almost 30% of net new units built between 2005 Q3 and 2015 Q2 were affordable units. While District 1 saw modest gains in net new units built, most of these were affordable (71%); half of net new units in District 5 are affordable. District 10 shows a net loss of 37 units affordable to very low income households with the demolition of Hunters View

public housing units in preparation for HOPE VI replacement. The new HOPE VI units are counted as affordable units as they are built (90 units in this reporting period).

Table 2
New Housing Production by Affordability, 2005 Q3 - 2015 Q2

| BoS District | Very Low | Low | Moderate | Total Affordable Units | Total Net Units | Affordable Units as % of Total Net Units |
|-----------------|--------------|--------------|--------------|------------------------|-----------------|--|
| BoS District 1 | 184 | 2 | 92 | 278 | 393 | 70.7% |
| BoS District 2 | - | - | 50 | 50 | 365 | 13.7% |
| BoS District 3 | 267 | 15 | 68 | 350 | 1,382 | 25.3% |
| BoS District 4 | - | - | 30 | 30 | 106 | 28.3% |
| BoS District 5 | 422 | 77 | 132 | 631 | 1,264 | 49.9% |
| BoS District 6 | 2,220 | 674 | 520 | 3,414 | 14,064 | 24.3% |
| BoS District 7 | 70 | 26 | 22 | 118 | 358 | 33.0% |
| BoS District 8 | 260 | 32 | 115 | 407 | 1,041 | 39.1% |
| BoS District 9 | 138 | 40 | 91 | 269 | 1,179 | 22.8% |
| BoS District 10 | (37) | 344 | 410 | 717 | 2,325 | 30.8% |
| BoS District 11 | - | 10 | 20 | 30 | 128 | 23.4% |
| TOTAL | 3,524 | 1,220 | 1,550 | 6,294 | 22,605 | 27.8% |

Housing affordability categories listed in the table are consistent with annual reporting submitted to the State Department of Housing and Community Development in compliance with the State Housing Element law. Units affordable to Extremely Very Low Income (EVLI) households are included under the Very Low Income (VLI) category because certain projects that benefit homeless individuals and families – groups considered as EVLI – have income eligibility caps at the VLI level. The table below also does not include Middle Income Units as required by Section 103 because information on or tracking of non-deed restricted units affordable to households at this income level is difficult to obtain.

Acquisition and Rehabilitation of Existing Affordable Housing Units

Table 3 below lists the number of units that have been substantially rehabilitated and/or acquired to ensure permanent affordability between 2005 and 2014. These are mostly single-room occupancy hotel units that are affordable to very low-income households.

Table 3
Acquisitions and Rehabilitation of Affordable Housing, 2005-2014

| BoS District | No. of Buildings | No. of Units |
|----------------|------------------|--------------|
| BoS District 2 | 1 | 24 |
| BoS District 3 | 1 | 72 |
| BoS District 5 | 4 | 430 |
| BoS District 6 | 13 | 1,014 |
| BoS District 9 | 2 | 319 |
| TOTALS | 21 | 1,859 |

Units Withdrawn From Protected Status

San Francisco's Residential Rent Stabilization and Arbitration Ordinance preserves affordability of about 175,000 rental units by limiting annual rent increases. Landlords can, however, remove such units from the rental market through no-fault evictions including owner move-in, Ellis Act, condo conversion, or demolition. The Housing Balance calculation takes into account units withdrawn from rent stabilization as loss of affordable housing.

The table below shows the distribution of no-fault evictions between 2005 and 2014. Owner move-ins and Ellis Out evictions made up the majority of no fault evictions (41% and 34% respectively). Districts 8 (15%), 9 (13%) and 6 (12%) lead in the number of no-fault evictions.

Table 4
No-Fault Evictions, 2005 Q3 – 2015 Q2

| BoS District | Demolition | Ellis Out | Owner Move-In | Condo Conversion | Other | Total No Fault |
|-----------------|------------|--------------|---------------|------------------|------------|----------------|
| BoS District 1 | 25 | 121 | 285 | 1 | 31 | 463 |
| BoS District 2 | 14 | 150 | 186 | 8 | 55 | 413 |
| BoS District 3 | 11 | 293 | 119 | 6 | 95 | 524 |
| BoS District 4 | 92 | 62 | 224 | 1 | 10 | 389 |
| BoS District 5 | 22 | 147 | 226 | 16 | 67 | 478 |
| BoS District 6 | 85 | 77 | 41 | 2 | 11 | 216 |
| BoS District 7 | 25 | 40 | 132 | 2 | 6 | 205 |
| BoS District 8 | 32 | 289 | 305 | 12 | 61 | 699 |
| BoS District 9 | 76 | 224 | 271 | 4 | 55 | 630 |
| BoS District 10 | 31 | 35 | 139 | 2 | 7 | 214 |
| BoS District 11 | 86 | 42 | 160 | - | 9 | 297 |
| TOTALS | 499 | 1,480 | 2,088 | 54 | 407 | 4,528 |

Entitled and Permitted Units

The table below lists units that have received entitlements from the Planning Commission or the Planning Department. These pipeline projects have also received site permits from the Department of Building Inspection and most are under construction as of the second quarter of 2015. About half of these units are being built in District 6.

Table 5
Permitted Units, 2015 Q2

| BoS District | Very Low Income | Low Income | Moderate | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|-----------------|-----------------|------------|------------|------------------------|---------------|--|
| BoS District 1 | - | - | 4 | 4 | 92 | 4.3% |
| BoS District 2 | - | - | 40 | 40 | 603 | 6.6% |
| BoS District 3 | - | - | 15 | 15 | 109 | 13.8% |
| BoS District 4 | - | - | 1 | 1 | 83 | 1.2% |
| BoS District 5 | 98 | 91 | 28 | 217 | 733 | 29.6% |
| BoS District 6 | 67 | 154 | 203 | 424 | 4,765 | 8.9% |
| BoS District 7 | - | - | - | - | 240 | 0.0% |
| BoS District 8 | 110 | 60 | - | 170 | 625 | 27.2% |
| BoS District 9 | - | - | 26 | 26 | 296 | 8.8% |
| BoS District 10 | 120 | 259 | 39 | 418 | 2,309 | 18.1% |
| BoS District 11 | - | 4 | 9 | 13 | 126 | 10.3% |
| TOTALS | 395 | 568 | 365 | 1,328 | 9,981 | 13.3% |

PROJECTED HOUSING BALANCE

Table 6 below residential projects that have received entitlements from the Planning Commission or the Planning Department but have not yet received a site or building permit. Overall projected housing balance for this reporting period is 13%. This balance is expected to change as several major projects have yet to declare how their affordable housing requirements will be met. In addition, three entitled major development projects – Treasure Island, ParkMerced, and Hunters Point – are not included in the accounting as specified in the ordinance. These three projects will yield almost 25,400 net new units; 21% (or 5,425 units) would be affordable to low and moderate income households.

**Table 6
Projected Housing Balance Calculation, 2015 Q2**

| BoS District | Very Low Income | Low Income | Moderate | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|-----------------|-----------------|------------|------------|------------------------|---------------|--|
| BoS District 1 | - | - | - | - | 11 | 0.0% |
| BoS District 2 | - | - | - | - | 42 | 0.0% |
| BoS District 3 | - | - | 12 | 12 | 340 | 3.5% |
| BoS District 4 | - | - | - | - | 2 | 0.0% |
| BoS District 5 | - | - | - | - | 51 | 0.0% |
| BoS District 6 | 170 | 83 | 71 | 324 | 2,552 | 12.7% |
| BoS District 7 | - | - | - | - | 51 | 0.0% |
| BoS District 8 | - | - | 3 | 3 | 103 | 2.9% |
| BoS District 9 | - | - | - | - | 56 | 0.0% |
| BoS District 10 | - | 126 | 196 | 322 | 1,971 | 16.3% |
| BoS District 11 | - | - | - | - | 11 | 0.0% |
| TOTALS | 170 | 209 | 282 | 661 | 5,190 | 12.7% |

RAD Program

The San Francisco Housing Authority’s Rental Assistance Demonstration (RAD) program will preserve at risk public and assisted housing projects. According to the Mayor’s Office, Phase 1 with 15 projects and a total of 1,425 units is slated to start construction in December 2015. These projects, shown in the table below, are also not included in the Projected Housing Balance calculation. Once completed, however, these units will figure in the Cumulative Housing Balance calculation.

Table 7
RAD Affordable Units

| BoS Districts | Projects | Units |
|-----------------|-----------|--------------|
| BoS District 1 | 2 | 144 |
| BoS District 2 | 1 | 113 |
| BoS District 3 | 2 | 143 |
| BoS District 5 | 3 | 263 |
| BoS District 6 | 2 | 189 |
| BoS District 7 | 1 | 110 |
| BoS District 8 | 2 | 132 |
| BoS District 9 | 1 | 118 |
| BoS District 10 | 1 | 213 |
| TOTALS | 15 | 1,425 |

NEXT STEPS

This report complies with the requirement that the Planning Department publish and update the *Housing Balance Report* bi-annually on September 1 and March 1 of each year. The Department is currently working on making reports available online and accessible in a page dedicated to the Housing Balance Report on the Planning Department’s website as mandated by the ordinance.

An annual hearing on the Housing Balance before the Board of Supervisors will be scheduled by April 1 of each year. The Mayor’s Office of Housing and Community Development, the Mayor’s Office of Economic and Workforce Development, the Rent Stabilization Board, the Department of Building Inspection, and the City Economist will present strategies for achieving and maintaining a housing balance consistent with the City’s housing goals at this annual meeting. Should the cumulative housing balance fall below 33%, MOHCD will determine the amount of funding needed to bring the City into the required minimum 33%.

**APPENDIX
CUMULATIVE HOUSING BALANCE REPORT TABLES BY PLANNING DISTRICTS**

**Table 1
Cumulative Housing Balance Calculation, 2005 Q3 – 2015 Q2**

| Planning Districts | New Affordable Housing Built | Acquisitions & Rehabs Completed | Units Removed from Protected Status | Total Entitled Affordable Units Permitted | Total Net New Units Built | Total Entitled Permitted Units | Housing Balance |
|--------------------|------------------------------|---------------------------------|-------------------------------------|---|---------------------------|--------------------------------|-----------------|
| 1 Richmond | 286 | - | (580) | 87 | 532 | 192 | -28.6% |
| 2 Marina | 31 | 24 | (232) | - | 116 | 143 | -68.3% |
| 3 Northeast | 329 | 72 | (534) | 15 | 1,056 | 92 | -10.3% |
| 4 Downtown | 1,619 | 745 | (124) | 219 | 5,134 | 1,232 | 38.6% |
| 5 Western Addition | 516 | 362 | (247) | 168 | 1,023 | 1,005 | 39.4% |
| 6 Buena Vista | 145 | - | (298) | 176 | 564 | 596 | 2.0% |
| 7 Central | 85 | - | (438) | - | 361 | 46 | -86.7% |
| 8 Mission | 637 | 319 | (619) | 37 | 1,707 | 353 | 18.2% |
| 9 South of Market | 2,044 | 337 | (129) | 365 | 10,458 | 5,212 | 16.7% |
| 10 South Bayshore | 383 | - | (54) | 236 | 841 | 508 | 41.9% |
| 11 Bernal Heights | 17 | - | (201) | - | 113 | 31 | -127.8% |
| 12 South Central | 38 | | (305) | 20 | 180 | 202 | -64.7% |
| 13 Ingleside | 110 | | -176 | 4 | 325 | 248 | -10.8% |
| 14 Inner Sunset | 24 | | -202 | - | 93 | 39 | -134.8% |
| 15 Outer Sunset | 30 | | -389 | 1 | 102 | 82 | -194.6% |
| Totals | 6,294 | 1,859 | (4,528) | 1,328 | 22,605 | 9,981 | 15.2% |

Table 2
New Housing Production by Affordability, 2005 Q3 – 2015 Q2

| Planning Districts | Very Low | Low | Moderate | Total Affordable Units | Total Net Units | Affordable Units as % of Total Net Units |
|--------------------|--------------|--------------|--------------|------------------------|-----------------|--|
| 1 Richmond | 184 | 2 | 100 | 286 | 532 | 53.8% |
| 2 Marina | - | - | 31 | 31 | 116 | 26.7% |
| 3 Northeast | 267 | 11 | 51 | 329 | 1,056 | 31.2% |
| 4 Downtown | 1,154 | 331 | 134 | 1,619 | 5,134 | 31.5% |
| 5 Western Addition | 367 | 77 | 72 | 516 | 1,023 | 50.4% |
| 6 Buena Vista | 55 | 14 | 76 | 145 | 564 | 25.7% |
| 7 Central | | 18 | 67 | 85 | 361 | 23.5% |
| 8 Mission | 474 | 40 | 123 | 637 | 1,707 | 37.3% |
| 9 South of Market | 990 | 404 | 650 | 2,044 | 10,458 | 19.5% |
| 10 South Bayshore | (37) | 287 | 133 | 383 | 841 | 45.5% |
| 11 Bernal Heights | - | - | 17 | 17 | 113 | 15.0% |
| 12 South Central | - | 10 | 28 | 38 | 180 | 21.1% |
| 13 Ingleside | 70 | 26 | 14 | 110 | 325 | 33.8% |
| 14 Inner Sunset | - | - | 24 | 24 | 93 | 25.8% |
| 15 Outer Sunset | - | - | 30 | 30 | 102 | 29.4% |
| Totals | 3,524 | 1,220 | 1,550 | 6,294 | 22,605 | 27.8% |

Table 3
Acquisitions and Rehabilitation of Affordable Housing, 2005-2014

| Planning District | No. of Buildings | No. of Units |
|--------------------|------------------|--------------|
| 2 Marina | 1 | 24 |
| 3 Northeast | 1 | 72 |
| 4 Downtown | 6 | 745 |
| 5 Western Addition | 3 | 362 |
| 8 Mission | 2 | 319 |
| 9 South of Market | 7 | 295 |
| Treasure Island | 1 | 42 |
| TOTALS | 21 | 1,859 |

Table 4
No-Fault Evictions, 2005 Q3 – 2015 Q2

| Planning District | Demolition | Ellis Out | Owner | Condo Conversion | Other | Total No-Fault |
|--------------------|------------|--------------|--------------|------------------|------------|----------------|
| | | | Move-In | | | |
| 1 Richmond | 32 | 193 | 321 | 2 | 32 | 580 |
| 2 Marina | 4 | 61 | 121 | 4 | 42 | 232 |
| 3 Northeast | 12 | 296 | 130 | 9 | 87 | 534 |
| 4 Downtown | 69 | 26 | 9 | - | 20 | 124 |
| 5 Western Addition | 11 | 78 | 118 | 8 | 32 | 247 |
| 6 Buena Vista | 11 | 110 | 122 | 4 | 51 | 298 |
| 7 Central | 23 | 160 | 212 | 9 | 34 | 438 |
| 8 Mission | 44 | 289 | 237 | 2 | 47 | 619 |
| 9 South of Market | 17 | 37 | 65 | 2 | 8 | 129 |
| 10 South Bayshore | 11 | 8 | 32 | 1 | 2 | 54 |
| 11 Bernal Heights | 30 | 51 | 96 | 4 | 20 | 201 |
| 12 South Central | 89 | 34 | 173 | - | 9 | 305 |
| 13 Ingleside | 41 | 18 | 111 | - | 6 | 176 |
| 14 Inner Sunset | 13 | 57 | 117 | 8 | 7 | 202 |
| 15 Outer Sunset | 92 | 62 | 224 | 1 | 10 | 389 |
| Totals | 499 | 1,480 | 2,088 | 54 | 407 | 4,528 |

Table 5
Permitted Units, 2015 Q2

| Planning District | Very Low Income | Low Income | Moderate | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|--------------------|-----------------|------------|------------|------------------------|---------------|--|
| 1 Richmond | - | 83 | 4 | 87 | 192 | 45.3% |
| 2 Marina | - | - | - | - | 143 | 0.0% |
| 3 Northeast | - | - | 15 | 15 | 92 | 16.3% |
| 4 Downtown | - | 37 | 182 | 219 | 1,232 | 17.8% |
| 5 Western Addition | 98 | 8 | 62 | 168 | 1,005 | 16.7% |
| 6 Buena Vista | 110 | 60 | 6 | 176 | 596 | 29.5% |
| 7 Central | - | - | - | - | 46 | 0.0% |
| 8 Mission | - | 22 | 15 | 37 | 353 | 10.5% |
| 9 South of Market | 67 | 261 | 37 | 365 | 5,212 | 7.0% |
| 10 South Bayshore | 120 | 93 | 23 | 236 | 508 | 46.5% |
| 11 Bernal Heights | - | - | - | - | 31 | 0.0% |
| 12 South Central | - | - | 20 | 20 | 202 | 9.9% |
| 13 Ingleside | - | 4 | - | 4 | 248 | 1.6% |
| 14 Inner Sunset | - | - | - | - | 39 | 0.0% |
| 15 Outer Sunset | - | - | 1 | 1 | 82 | 1.2% |
| Totals | 395 | 568 | 365 | 1,328 | 9,981 | 13.3% |

Table 6
Projected Housing Balance Calculation, 2015 Q2

| Planning District | Very Low Income | Low Income | Moderate | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|--------------------|-----------------|------------|------------|------------------------|---------------|--|
| 1 Richmond | - | - | - | - | 12 | 0.0% |
| 2 Marina | - | - | - | - | 38 | 0.0% |
| 3 Northeast | - | - | 12 | 12 | 314 | 3.8% |
| 4 Downtown | 170 | 83 | - | 253 | 1,183 | 21.4% |
| 5 Western Addition | - | - | - | - | 4 | 0.0% |
| 6 Buena Vista | - | - | 3 | 3 | 135 | 2.2% |
| 7 Central | - | - | - | - | 8 | 0.0% |
| 8 Mission | - | - | - | - | 57 | 0.0% |
| 9 South of Market | - | - | 81 | 81 | 1,671 | 4.8% |
| 10 South Bayshore | - | 126 | 186 | 312 | 1,691 | 18.5% |
| 11 Bernal Heights | - | - | - | - | 7 | 0.0% |
| 12 South Central | - | - | - | - | 16 | 0.0% |
| 13 Ingleside | - | - | - | - | 14 | 0.0% |
| 14 Inner Sunset | - | - | - | - | 38 | 0.0% |
| 15 Outer Sunset | - | - | - | - | 2 | 0.0% |
| Totals | 170 | 209 | 282 | 661 | 5,190 | 12.7% |

Table 7
RAD Affordable Units

| Planning District | No. of Units | as % of Total |
|--------------------|--------------|---------------|
| 1 Richmond | 144 | 10.1% |
| 3 Northeast | 143 | 10.0% |
| 4 Downtown | 189 | 13.3% |
| 5 Western Addition | 376 | 26.4% |
| 6 Buena Vista | 132 | 9.3% |
| 10 South Bayshore | 213 | 14.9% |
| 11 Bernal Heights | 118 | 8.3% |
| 14 Inner Sunset | 110 | 7.7% |
| TOTALS | 1,425 | 100.0% |



SAN FRANCISCO PLANNING DEPARTMENT

MEMO

DATE: 7 July 2015
TO: Members, San Francisco Board of Supervisors
FROM: John Rahaim
Director of Planning
RE: HOUSING BALANCE REPORT

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SUMMARY

This report is submitted in compliance with the recently passed Ordinance No. 53-15 requiring the Planning Department to monitor and report on the balance between new market rate housing and new affordable housing production. This "Housing Balance" is defined as the proportion of all new affordable housing units to the total number of all new housing units for a 10-year "Housing Balance Period."

One of the stated purposes of the Housing Balance is "to ensure that data on meeting affordable housing targets City-wide and within neighborhoods informs the approval process for new housing development." In November 2014, San Francisco's voters endorsed Proposition K, which set a goal of 33% of all new housing units to be affordable. Housing production targets in the City's Housing Element adopted in April 2015 includes 28,870 new units to be built between 2015 and 2022, 57% of which should be affordable. Thirty percent (30%) of net new housing produced in the last ten years were affordable.

The ordinance requires that the Housing Balance be provided using two calculations: a) "Cumulative Housing Balance" consisting of housing built within a 10 year Housing Balance period, acquisition and substantial rehabilitation of affordable units, projects that have received both approvals from the Planning Commission or Planning Department and site permits from the Department of Building Inspection, and units withdrawn from protected status; and b) "Projected Housing Balance" which includes residential projects that have received approvals from the Planning Commission or Planning Department but have not yet commenced construction.

The Citywide Cumulative Housing Balance for the 2005-2014 Housing Balance Period is 21%, although this varies by districts. Distribution of the Cumulative Housing Balance over the 11 Board of Supervisor Districts ranges from -376% (District 4) to 53% (District 5). This variation, especially with negative housing balances, is due to the high number of units withdrawn from protection such as rent control relative to the number of total net new units and affordable units built in specific districts. The Projected Housing Balance Citywide is 11%.

BACKGROUND

On 21 April 2015, the Board of Supervisors passed Ordinance No. 53-15 amending the Planning Code to include a new Section 103 requiring the Planning Department to monitor and

report on the Housing Balance between new market rate housing and new affordable housing production. The Housing Balance Report will be submitted bi-annually by March 1 and September 1 of each year and will also be published on a visible and accessible page on the Planning Department’s website. Section 103 also requires an annual hearing at the Board of Supervisors on strategies for achieving and maintaining the required housing balance in accordance with the City’s housing production goals. The ordinance also instructed the Planning Department to produce the first report by 1 June 2015.

The stated purposes for the Housing Balance Monitoring and Reporting are: a) to maintain a balance between new affordable and market rate housing Citywide and within neighborhoods; b) to make housing available for all income levels and housing need types; c) to preserve the mixed-income character of the City and its neighborhoods; d) to offset the withdrawal of existing housing units from rent stabilization and the loss of single-room occupancy hotel units; e) to ensure the availability of land and encourage the deployment of resources to provide sufficient housing affordable to households of very low, low, and moderate incomes; f) to ensure adequate housing for families, seniors and the disabled communities; g) to ensure that data on meeting affordable housing targets Citywide and within neighborhoods informs the approval process for new housing development; and h) to enable public participation in determining the appropriate mix of new housing approvals.

Specifically, the Housing Balance Report will track performance toward meeting the goals set by Proposition K and the City’s Housing Element. On November 2014, San Francisco’s voters endorsed Proposition K, which set a goal of 33% of all new housing units to be affordable. Housing production targets in the City’s Housing Element adopted in April 2015 includes 28,870 new units built between 2015 and 2022, 57% of which should be affordable.

CUMULATIVE HOUSING BALANCE CALCULATION

Section 103 states that the Housing Balance “be expressed as a percentage, obtained by dividing the cumulative total of extremely low, very low, low, and moderate income affordable housing (all units 0-120% AMI) minus the lost protected units, by the total number of net new housing units with the Housing Balance Period.” “Protected units” include units that are subject to rent control under the City’s Residential Rent Stabilization and Arbitration Ordinance. Additional elements that figure into the Housing Balance include HOPE SF and RAD public housing replacement, substantially rehabilitated units, and single-room occupancy hotel units (SROs).

$$\begin{array}{r}
 \text{[New Affordable Housing + Acquisitions \& Rehabs} \\
 \text{+ HOPE SF + RAD Public Housing Replacement +} \\
 \text{Entitled \& Permitted Affordable Units]} \\
 \text{- [Units Removed from Protected Status]} \\
 \hline
 \text{[Net New Housing Built + Entitled \& Permitted Net Units]}
 \end{array}
 =
 \text{HOUSING BALANCE}$$

The "Housing Balance Period" is a ten-year period starting with the first quarter of 2005 through the last quarter of 2014. Subsequent housing balance reports will cover the 10 years preceding the most recent quarter.

Table 1 below shows the Cumulative Housing Balance for 2005-2014 is 21% Citywide. Housing Balances for Board of Supervisor Districts range from -376% (District 4) to 53% (District 5). Districts 5, 6, 7, 9, and 10 have positive housing balances (53%, 27%, 6%, 3% and 36%). Negative balances in several districts resulted from the larger numbers of units removed from protected status relative to the new affordable housing and net new housing units built.

Table 1
Cumulative Housing Balance Calculation

| BoS Districts | New Affordable Housing Built | Acquisitions & Rehabs Completed | Units Removed from Protected Status | Total Entitled Affordable Units Permitted | Planned RAD Units | Net Affordable Housing Stock | Total Net New Units Built | Total Entitled Units | Housing Balance |
|---------------|------------------------------|---------------------------------|-------------------------------------|---|-------------------|------------------------------|---------------------------|----------------------|-----------------|
| BoS D1 | 255 | - | 535 | 4 | 144 | (132) | 372 | 39 | -32.1% |
| BoS D2 | 37 | 24 | 491 | 9 | 113 | (308) | 374 | 69 | -69.5% |
| BoS D3 | 339 | 72 | 580 | 12 | 143 | (14) | 1,436 | 107 | -0.9% |
| BoS D4 | 15 | - | 388 | 1 | - | (372) | 43 | 56 | -375.8% |
| BoS D5 | 620 | 430 | 562 | 217 | 263 | 968 | 1,374 | 444 | 53.2% |
| BoS D6 | 3,307 | 1,014 | 641 | 683 | 189 | 4,552 | 12,939 | 3,814 | 27.2% |
| BoS D7 | 109 | - | 222 | 36 | 110 | 33 | 344 | 182 | 6.3% |
| BoS D8 | 377 | - | 844 | 173 | 132 | (162) | 1,061 | 244 | -12.4% |
| BoS D9 | 279 | 319 | 688 | 16 | 118 | 44 | 1,187 | 117 | 3.4% |
| BoS D10 | 1,056 | - | 216 | 445 | 213 | 1,498 | 2,467 | 1,667 | 36.2% |
| BoS D11 | 165 | - | 303 | 13 | - | (125) | 274 | 89 | -34.4% |
| TOTALS | 6,559 | 1,859 | 5,470 | 1,609 | 1,425 | 5,982 | 21,871 | 6,828 | 20.8% |

CUMULATIVE HOUSING BALANCE ELEMENTS

Because the scope covered by the Housing Balance calculation is broad, each element – or group of elements – will be discussed separately. The body of this report will account for figures at the Board of Supervisor district level; an appendix will show the breakdown of each element using the Planning Department District geographies as required by Section 103. This is to ensure simple and uncluttered tables.

Affordable Housing and Net New Housing Production

Table 2 below shows housing production between 2005 and 2014, as well as Q1 2015. This ten-year period resulted in a net addition of 21,870 units to the City's housing stock, including 6,560 affordable units. Housing affordability categories listed in the table are consistent

with annual reporting submitted to the State Department of Housing and Community Development in compliance with the State Housing Element law. Units affordable to Extremely Very Low Income (EVLI) households are included under the Very Low Income (VLI) category because certain projects that benefit homeless individuals and families – groups considered as EVLI – have income eligibility caps at the VLI level. The table below also does not include Middle Income Units as required by Section 103 because information on or tracking of non-deed restricted units affordable to households at this income level is difficult to obtain.

Almost 12,940 (60%) of net new housing and over 3,300 (50%) of affordable housing built in the last ten years were in District 6. District 10 follows with almost 2,470 (11%) net new units, including 1,060 (16%) affordable units. The table below also shows that almost 30% of net new units built in the last ten years were affordable units. While Districts 1 and 11 saw modest gains in net new units built, most of these were affordable (69% and 60% respectively).

Table 2
New Housing Production by Affordability, 2005-2014 and Q1 2015

| BoS District | Very Low | Low | Moderate | Total Affordable Units | Total Net Units | Affordable Units as % of Total Net Units |
|-----------------|--------------|--------------|--------------|------------------------|-----------------|--|
| BoS District 1 | 184 | 2 | 67 | 255 | 372 | 68.5% |
| BoS District 2 | - | - | 36 | 37 | 374 | 9.9% |
| BoS District 3 | 267 | 13 | 58 | 338 | 1,436 | 23.5% |
| BoS District 4 | - | - | 15 | 15 | 43 | 34.9% |
| BoS District 5 | 422 | 77 | 121 | 620 | 1,374 | 45.1% |
| BoS District 6 | 2,341 | 568 | 392 | 3,307 | 12,939 | 25.6% |
| BoS District 7 | 70 | - | 39 | 109 | 344 | 31.7% |
| BoS District 8 | 260 | 32 | 84 | 377 | 1,061 | 35.5% |
| BoS District 9 | 158 | 47 | 65 | 279 | 1,187 | 23.5% |
| BoS District 10 | 383 | 309 | 364 | 1,056 | 2,467 | 42.8% |
| BoS District 11 | 138 | 11 | 15 | 165 | 274 | 60.2% |
| TOTAL | 4,223 | 1,059 | 1,256 | 6,558 | 21,871 | 30.0% |

Acquisition and Rehabilitation of Existing Affordable Housing Units

Table 3 below lists the number of units that have been substantially rehabilitated and/or acquired to ensure permanent affordability between 2005 and 2014. These are mostly single-room occupancy hotel units that are affordable to very low-income households.

Table 3
Acquisitions and Rehabilitation of Affordable Housing, 2005-2014

| BoS District | No. of Buildings | No. of Units |
|----------------|------------------|--------------|
| BoS District 2 | 1 | 24 |
| BoS District 3 | 1 | 72 |
| BoS District 5 | 4 | 430 |
| BoS District 6 | 13 | 1,014 |
| BoS District 9 | 2 | 319 |
| TOTALS | 21 | 1,859 |

Units Withdrawn From Protected Status

San Francisco's Residential Rent Stabilization and Arbitration Ordinance preserves affordability of about 175,000 rental units by limiting annual rent increases. Landlords can, however, remove such units from the rental market through no-fault evictions including owner move-in, Ellis Act, condo conversion, or demolition. The Housing Balance calculation takes into account units withdrawn from rent stabilization as loss of affordable housing.

The table below shows the distribution of no-fault evictions between 2005 and 2014. Owner move-ins and Ellis Out evictions made up the majority of no fault evictions (41% and 34% respectively). Districts 8 (15%), 9 (13%) and 6 (12%) lead in the number of no-fault evictions.

Table 4
No-Fault Evictions, 2005-2014

| BoS District | Demolition | Ellis Out | Owner Move-In | Condo Conversion | Other | Total No Fault |
|-----------------|------------|--------------|---------------|------------------|------------|----------------|
| BoS District 1 | 26 | 167 | 304 | 1 | 37 | 535 |
| BoS District 2 | 15 | 189 | 213 | 12 | 62 | 491 |
| BoS District 3 | 11 | 358 | 115 | 3 | 93 | 580 |
| BoS District 4 | 90 | 63 | 224 | - | 11 | 388 |
| BoS District 5 | 35 | 186 | 249 | 14 | 78 | 562 |
| BoS District 6 | 86 | 128 | 53 | 2 | 372 | 641 |
| BoS District 7 | 31 | 47 | 138 | 2 | 4 | 222 |
| BoS District 8 | 51 | 370 | 333 | 14 | 76 | 844 |
| BoS District 9 | 69 | 276 | 288 | 3 | 52 | 688 |
| BoS District 10 | 31 | 29 | 141 | 1 | 14 | 216 |
| BoS District 11 | 86 | 40 | 162 | - | 15 | 303 |
| TOTALS | 531 | 1,853 | 2,220 | 52 | 814 | 5,470 |

Entitled and Permitted Units

The table below lists units that have received entitlements from the Planning Commission or the Planning Department. These pipeline projects have also received site permits from the Department of Building Inspection and most are under construction as of the first quarter of 2015. About 58% of these units are being built in District 6.

Table 5
Permitted Units, Q1 2015

| BoS District | Very Low Income | Low Income | Moderate | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|-----------------|-----------------|------------|------------|------------------------|---------------|--|
| BoS District 1 | - | - | 4 | 4 | 39 | 10.3% |
| BoS District 2 | - | - | 9 | 9 | 69 | 13.0% |
| BoS District 3 | - | - | 12 | 12 | 107 | 11.2% |
| BoS District 4 | - | - | 1 | 1 | 56 | 1.8% |
| BoS District 5 | 98 | 91 | 28 | 217 | 444 | 48.9% |
| BoS District 6 | 137 | 164 | 382 | 683 | 3,814 | 17.9% |
| BoS District 7 | - | - | 36 | 36 | 182 | 19.8% |
| BoS District 8 | 110 | 60 | 3 | 173 | 244 | 70.9% |
| BoS District 9 | - | - | 16 | 16 | 117 | 13.7% |
| BoS District 10 | 120 | 273 | 52 | 445 | 1,667 | 26.7% |
| BoS District 11 | - | 4 | 9 | 13 | 89 | 14.6% |
| TOTALS | 465 | 592 | 552 | 1,609 | 6,828 | 23.6% |

RAD Program

The San Francisco Housing Authority's Rental Assistance Demonstration (RAD) program will preserve at risk public and assisted housing projects. According to the Mayor's Office, Phase 1 with 15 projects and a total of 1,425 units is slated to start construction in December 2015.

Table 6
RAD Affordable Units

| BoS Districts | Projects | Units |
|-----------------|-----------|--------------|
| BoS District 1 | 2 | 144 |
| BoS District 2 | 1 | 113 |
| BoS District 3 | 2 | 143 |
| BoS District 5 | 3 | 263 |
| BoS District 6 | 2 | 189 |
| BoS District 7 | 1 | 110 |
| BoS District 8 | 2 | 132 |
| BoS District 9 | 1 | 118 |
| BoS District 10 | 1 | 213 |
| TOTALS | 15 | 1,425 |

Single-Room Occupancy Residential Hotel Units

Single-Room Occupancy residential hotels (SROs) have historically provided low rent options to lower income individuals and households. The Department of Building Inspection administers Administrative Code Chapter 41, or the Residential Hotel Conversion and Demolition Ordinance. This ordinance preserves the stock of residential hotels and regulates the conversion and demolitions of SROs. According to DBI records, the number of residential hotel units has been stable in the last four years, with no loss nor other change in the unit numbers.

There are over 20,000 SRO units in San Francisco. Table 7 shows the distribution of SRO units across the City. Majority of these units are in Districts 6 and 3 (53% and 37%, respectively).

Table 7
Single-Room Occupancy Hotel Units, 2014

| BoS Districts | No. of SRO Buildings | No. of SRO Units | % of Total SRO Units |
|-----------------|----------------------|------------------|----------------------|
| BoS District 1 | 7 | 95 | 0.5% |
| BoS District 2 | 21 | 623 | 3.1% |
| BoS District 3 | 210 | 7,297 | 36.5% |
| BoS District 4 | 2 | 34 | 0.2% |
| BoS District 5 | 20 | 369 | 1.8% |
| BoS District 6 | 233 | 10,647 | 53.2% |
| BoS District 7 | 2 | 69 | 0.3% |
| BoS District 8 | 6 | 153 | 0.8% |
| BoS District 9 | 20 | 566 | 2.8% |
| BoS District 10 | 6 | 144 | 0.7% |
| BoS District 11 | 3 | 16 | 0.1% |
| TOTALS | 530 | 20,013 | 100.0% |

Public Housing Units

Table 8 shows the distribution of public housing in San Francisco. To ensure that affordable public housing built between 2005 and 2014 are not double counted, the table below shows the number of units at the start of the housing balance reporting period.

Table 8
Public Housing Units

| BoS District | No. of Units | Units as % of Total Units |
|-----------------|---------------|---------------------------|
| BoS District 1 | 256 | 1.4% |
| BoS District 2 | 502 | 2.8% |
| BoS District 3 | 1,606 | 8.9% |
| BoS District 4 | 16 | 0.1% |
| BoS District 5 | 3,535 | 19.5% |
| BoS District 6 | 3,601 | 19.9% |
| BoS District 7 | 120 | 0.7% |
| BoS District 8 | 1,464 | 8.1% |
| BoS District 9 | 716 | 4.0% |
| BoS District 10 | 4,395 | 24.3% |
| BoS District 11 | 25 | 0.1% |
| Not Available | 1,859 | 10.3% |
| TOTALS | 18,095 | 100.0% |

PROJECTED HOUSING BALANCE

Table 9 below residential projects that have received entitlements from the Planning Commission or the Planning Department but have not yet received a site or building permit. Four major development projects – Treasure Island, ParkMerced, Hunters Point, and Schlage – are not included in the accounting below. These four projects will yield almost 25,400 net new units, including 5,425 units affordable to low and moderate income households (21%).

Table 9
Projected Housing Balance Calculation

| BoS District | Very Low Income | Low Income | Moderate | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|-----------------|-----------------|------------|-----------|------------------------|---------------|--|
| BoS District 1 | - | - | - | - | 25 | 0.0% |
| BoS District 2 | - | - | 3 | 3 | 73 | 4.1% |
| BoS District 3 | - | 2 | 12 | 14 | 462 | 3.0% |
| BoS District 4 | - | - | - | - | - | - |
| BoS District 5 | - | - | - | - | 51 | 0.0% |
| BoS District 6 | - | 324 | 80 | 404 | 2,718 | 14.9% |
| BoS District 7 | - | - | - | - | 38 | 0.0% |
| BoS District 8 | - | - | - | - | 73 | 0.0% |
| BoS District 9 | - | - | - | - | 29 | 0.0% |
| BoS District 10 | - | - | - | - | 287 | 0.0% |
| BoS District 11 | - | - | - | - | 15 | 0.0% |
| TOTALS | - | 326 | 95 | 421 | 3,771 | 11.2% |

NEXT STEPS

The ordinance also requires the following: a) that the Planning Department publish and update the Housing Balance Report bi-annually by September 1 and March 1 of each year; b) that the Department makes the Housing Balance Report available online and accessible on the Planning Department's website; c) schedule an annual hearing on the Housing Balance before the Board of Supervisors by April 1 of each year. The Mayor's Office of Housing and Community Development, the Mayor's Office of Economic and Workforce Development, the Rent Stabilization Board, the Department of Building Inspection, and the City Economist will present strategies for achieving and maintaining a housing balance consistent with the City's housing goals at this annual meeting. Should the cumulative housing balance fall below 33%, MOHCD will determine the amount of funding needed to bring the City into the required minimum 33%.

APPENDIX

CUMULATIVE HOUSING BALANCE REPORT TABLES BY PLANNING DISTRICTS

Table 1
Cumulative Housing Balance Calculation

| Planning District | New Affordable Housing Built | Acquisitions & Rehabs Completed | Units Removed from Protected Status | Total Entitled Affordable Units Permitted | Planned RAD Units | Net Affordable Housing Stock | Total Net New Units Built | Total Entitled Units | Housing Balance |
|--------------------|------------------------------|---------------------------------|-------------------------------------|---|-------------------|------------------------------|---------------------------|----------------------|-----------------|
| 1 Richmond | 261 | - | 656 | 87 | 144 | (164) | 539 | 89 | -26.1% |
| 2 Marina | 23 | 24 | 292 | - | - | (245) | 135 | - | -181.5% |
| 3 Northeast | 321 | 72 | 595 | 12 | 143 | (47) | 1,072 | 107 | -4.0% |
| 4 Downtown | 1,703 | 745 | 500 | 408 | 189 | 2,545 | 4,998 | 845 | 43.6% |
| 5 Western Addition | 399 | 362 | 297 | 137 | 376 | 977 | 914 | 416 | 73.5% |
| 6 Buena Vista | 138 | - | 356 | 179 | 132 | 93 | 570 | 291 | 10.8% |
| 7 Central | 66 | - | 519 | - | - | (453) | 357 | - | -126.9% |
| 8 Mission | 637 | 319 | 764 | 37 | - | 229 | 1,731 | 256 | 11.5% |
| 9 South of Market | 1,953 | 337 | 133 | 445 | - | 2,602 | 9,669 | 3,899 | 19.2% |
| 10 South Bayshore | 733 | - | 65 | 253 | 118 | 1,039 | 998 | 588 | 65.5% |
| 11 Bernal Heights | 14 | - | 195 | - | 213 | 32 | 119 | - | 26.9% |
| 12 South Central | 174 | - | 301 | 10 | - | (117) | 326 | 71 | -29.5% |
| 13 Ingleside | 106 | - | 186 | 40 | - | (40) | 315 | 210 | -7.6% |
| 14 Inner Sunset | 15 | - | 223 | - | 110 | (98) | 90 | - | -108.9% |
| 15 Outer Sunset | 15 | - | 388 | 1 | - | (372) | 38 | 56 | -395.7% |
| TOTALS | 6,558 | 1,859 | 5,470 | 1,609 | 1,425 | 5,981 | 21,871 | 6,828 | 20.8% |

Table 2
New Housing Production by Affordability, 2005-2014 and Q1 2015

| Planning District | Very Low | Low | Moderate | Total Affordable Units | Total Net Units | Affordable Units as |
|--------------------|--------------|--------------|--------------|------------------------|-----------------|---------------------|
| 1 Richmond | 184 | 2 | 75 | 261 | 539 | 48.4% |
| 2 Marina | - | - | 23 | 23 | 135 | 17.0% |
| 3 Northeast | 267 | 9 | 45 | 321 | 1,072 | 29.9% |
| 4 Downtown | 1,351 | 216 | 136 | 1,703 | 4,998 | 34.1% |
| 5 Western Addition | 266 | 77 | 56 | 399 | 914 | 43.7% |
| 6 Buena Vista | 55 | 14 | 69 | 138 | 570 | 24.2% |
| 7 Central | - | 18 | 48 | 66 | 357 | 18.5% |
| 8 Mission | 494 | 47 | 96 | 637 | 1,731 | 36.8% |
| 9 South of Market | 1,015 | 428 | 510 | 1,953 | 9,669 | 20.2% |
| 10 South Bayshore | 364 | 256 | 113 | 733 | 998 | 73.4% |
| 11 Bernal Heights | - | - | 14 | 14 | 119 | 11.8% |
| 12 South Central | 138 | 11 | 25 | 174 | 326 | 53.4% |
| 13 Ingleside | 70 | - | 36 | 106 | 315 | 33.7% |
| 14 Inner Sunset | - | - | 15 | 15 | 90 | 16.7% |
| 15 Outer Sunset | - | - | 15 | 15 | 38 | 39.5% |
| TOTALS | 4,204 | 1,078 | 1,276 | 6,558 | 21,871 | 30.0% |

Table 3
Acquisitions and Rehabilitation of Affordable Housing, 2005-2014

| Planning District | No. of Buildings | No. of Units |
|--------------------|------------------|--------------|
| 2 Marina | 1 | 24 |
| 3 Northeast | 1 | 72 |
| 4 Downtown | 6 | 745 |
| 5 Western Addition | 3 | 362 |
| 8 Mission | 2 | 319 |
| 9 South of Market | 7 | 295 |
| Treasure Island | 1 | 42 |
| TOTALS | 21 | 1,859 |

Table 4
No-Fault Evictions, 2005-2014

| Planning District | Demolition | Ellis Out | Owner Move-In | Condo Conversion | Other | Total No Fault |
|--------------------|------------|--------------|---------------|------------------|------------|----------------|
| 1 Richmond | 32 | 233 | 348 | 3 | 40 | 656 |
| 2 Marina | 5 | 99 | 137 | 4 | 47 | 292 |
| 3 Northeast | 12 | 363 | 129 | 6 | 85 | 595 |
| 4 Downtown | 71 | 34 | 13 | - | 382 | 500 |
| 5 Western Addition | 22 | 95 | 128 | 10 | 42 | 297 |
| 6 Buena Vista | 15 | 132 | 149 | 4 | 56 | 356 |
| 7 Central | 42 | 217 | 212 | 10 | 38 | 519 |
| 8 Mission | 43 | 396 | 273 | 2 | 50 | 764 |
| 9 South of Market | 15 | 42 | 66 | 2 | 8 | 133 |
| 10 South Bayshore | 10 | 11 | 37 | - | 7 | 65 |
| 11 Bernal Heights | 25 | 46 | 100 | 3 | 21 | 195 |
| 12 South Central | 86 | 33 | 167 | - | 15 | 301 |
| 13 Ingleside | 45 | 20 | 115 | - | 6 | 186 |
| 14 Inner Sunset | 18 | 69 | 122 | 8 | 6 | 223 |
| 15 Outer Sunset | 90 | 63 | 224 | - | 11 | 388 |
| TOTALS | 531 | 1,853 | 2,220 | 52 | 814 | 5,470 |

Table 5
Permitted Units

| Planning District | Very Low Income | Low Income | Moderate | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|--------------------|-----------------|------------|------------|------------------------|---------------|--|
| 1 Richmond | - | 83 | 4 | 87 | 89 | 97.8% |
| 2 Marina | - | - | - | - | - | - |
| 3 Northeast | - | - | 12 | 12 | 107 | 11.2% |
| 4 Downtown | - | 47 | 361 | 408 | 845 | 48.3% |
| 5 Western Addition | 98 | 8 | 31 | 137 | 416 | 32.9% |
| 6 Buena Vista | 110 | 60 | 9 | 179 | 291 | 61.5% |
| 7 Central | - | - | - | - | - | - |
| 8 Mission | - | 22 | 15 | 37 | 256 | 14.5% |
| 9 South of Market | 137 | 261 | 47 | 445 | 3,899 | 11.4% |
| 10 South Bayshore | 120 | 107 | 26 | 253 | 588 | 43.0% |
| 11 Bernal Heights | - | - | - | - | - | - |
| 12 South Central | - | - | 10 | 10 | 71 | 14.1% |
| 13 Ingleside | - | 4 | 36 | 40 | 210 | 19.0% |
| 14 Inner Sunset | - | - | - | - | - | - |
| 15 Outer Sunset | - | - | 1 | 1 | 56 | 1.8% |
| TOTALS | 465 | 592 | 552 | 1,609 | 6,828 | 23.6% |

Table 6
RAD Affordable Units

| Planning District | No. of Units | as % of Total |
|--------------------------|---------------------|----------------------|
| 1 Richmond | 144 | 10.1% |
| 3 Northeast | 143 | 10.0% |
| 4 Downtown | 189 | 13.3% |
| 5 Western Addition | 376 | 26.4% |
| 6 Buena Vista | 132 | 9.3% |
| 10 South Bayshore | 213 | 14.9% |
| 11 Bernal Heights | 118 | 8.3% |
| 14 Inner Sunset | 110 | 7.7% |
| TOTALS | 1,425 | 100.0% |

Table 7
Single-Room Occupancy Hotel Units, 2014

| Planning District | No. of SRO Buildings | No. of SRO Units | % of Total SRO Units |
|--------------------------|-----------------------------|-------------------------|-----------------------------|
| 1 Richmond | 8 | 115 | 0.6% |
| 2 Marina | 18 | 368 | 1.8% |
| 3 Northeast | 161 | 5,459 | 27.3% |
| 4 Downtown | 225 | 10,187 | 50.9% |
| 5 Western Addition | 13 | 515 | 2.6% |
| 6 Buena Vista | 16 | 334 | 1.7% |
| 8 Mission | 56 | 1,956 | 9.8% |
| 9 South of Market | 18 | 645 | 3.2% |
| 10 South Bayshore | 3 | 79 | 0.4% |
| 11 Bernal Heights | 3 | 62 | 0.3% |
| 12 South Central | 3 | 157 | 0.8% |
| 13 Ingleside | 1 | 1 | 0.0% |
| 14 Inner Sunset | 3 | 101 | 0.5% |
| 15 Outer Sunset | 2 | 34 | 0.2% |
| TOTALS | 530 | 20,013 | 100.0% |

Table 8
Public Housing Units

| Planning District | No. of Units | as % of Total |
|--------------------|---------------|---------------|
| 1 Richmond | 396 | 2.2% |
| 2 Marina | 138 | 0.8% |
| 3 Northeast | 1,606 | 8.9% |
| 4 Downtown | 2,599 | 14.4% |
| 5 Western Addition | 3,597 | 19.9% |
| 6 Buena Vista | 352 | 1.9% |
| 7 Central | 584 | 3.2% |
| 8 Mission | 1,074 | 5.9% |
| 9 South of Market | 1,498 | 8.3% |
| 10 South Bayshore | 3,158 | 17.5% |
| 11 Bernal Heights | 357 | 2.0% |
| 12 South Central | 467 | 2.6% |
| 13 Ingleside | 29 | 0.2% |
| 14 Inner Sunset | 116 | 0.6% |
| 15 Outer Sunset | 16 | 0.1% |
| Presidio | 100 | 0.6% |
| Treasure Island | 149 | 0.8% |
| n/a | 1,859 | 10.3% |
| TOTALS | 18,095 | 100.0% |

Table 9
Projected Housing Balance Calculation

| Planning District | Very Low Income | Low Income | Moderate | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|--------------------|-----------------|------------|-----------|------------------------|---------------|--|
| 1 Richmond | | | | - | 26 | 0.0% |
| 2 Marina | | | 3 | 3 | 72 | 4.2% |
| 3 Northeast | | | 12 | 12 | 409 | 2.9% |
| 4 Downtown | | 279 | 9 | 288 | 1,300 | 22.2% |
| 5 Western Addition | | | | - | 1 | 0.0% |
| 6 Buena Vista | | | | - | 111 | 0.0% |
| 7 Central | | | | - | 6 | 0.0% |
| 8 Mission | | | | - | 25 | 0.0% |
| 9 South of Market | | 47 | 71 | 118 | 1,719 | 6.9% |
| 10 South Bayshore | | | | - | 29 | 0.0% |
| 11 Bernal Heights | | | | - | 7 | 0.0% |
| 12 South Central | | | | - | 25 | 0.0% |
| 13 Ingleside | | | | - | 3 | 0.0% |
| 14 Inner Sunset | | | | - | 38 | 0.0% |
| 15 Outer Sunset | - | - | - | - | - | - |
| TOTALS | - | 326 | 95 | 421 | 3,771 | 11.2% |

BOARD of SUPERVISORS



City Hall
Dr. Carlton B. Goodlett Place, Room 244
San Francisco 94102-4689
Tel. No. 554-5184
Fax No. 554-5163
TDD/TTY No. 554-5227

MEMORANDUM

TO: John Rahaim, Director, Planning Department

FROM: Andrea Ausberry, Assistant Clerk, Land Use and Transportation
Committee Board of Supervisors

DATE: July 14, 2015

SUBJECT: LEGISLATION INTRODUCED

The Board of Supervisors' Land Use and Transportation Committee has received the following proposed legislation, introduced by Supervisor Kim on July 7, 2015:

File No. 150748

**Hearing to present findings from the inaugural Housing Balance Report;
and requesting the Planning Department to report.**

If you have any additional comments or reports to be included with the file, please forward them to me at the Board of Supervisors, City Hall, Room 244, 1 Dr. Carlton B. Goodlett Place, San Francisco, CA 94102.

c:
Scott Sanchez, Planning Department
Sarah Jones, Planning Department
AnMarie Rodgers, Planning Department
Aaron Starr, Planning Department
Joy Navarrete, Planning Department
Jeanie Poling, Planning Department

Major, Erica (BOS)

From: Major, Erica (BOS)
Sent: Tuesday, July 14, 2015 3:17 PM
To: Rahaim, John (CPC)
Cc: Sanchez, Scott (CPC); Jones, Sarah (CPC); Rodgers, AnMarie (CPC); Starr, Aaron (CPC); Navarrete, Joy (CPC); Poling, Jeanie (CPC); Ausberry, Andrea
Subject: REFERRAL.FYI (150748) Hearing - Annual Housing Balance Report - 2015
Attachments: 150748 FYI.pdf

Greetings:

This matter is being forwarded to your department for informational purposes. If you have any comments or reports to be included with the file, please forward them to Andrea.Ausberry@sfgov.org at the Board of Supervisors, City Hall, Room 244, 1 Dr. Carlton B. Goodlett Place, San Francisco, CA 94102.

Thank you.

Erica Major

Assistant Committee Clerk

Board of Supervisors

1 Dr. Carlton B. Goodlett Place, City Hall, Room 244

San Francisco, CA 94102

Phone: (415) 554-4441 | Fax: (415) 554-5163

Erica.Major@sfgov.org | www.sfbos.org



Click [here](#) to complete a Board of Supervisors Customer Service Satisfaction form.

The [Legislative Research Center](#) provides 24-hour access to Board of Supervisors legislation, and archived matters since August 1998.

Disclosures: Personal information that is provided in communications to the Board of Supervisors is subject to disclosure under the California Public Records Act and the San Francisco Sunshine Ordinance. Personal information provided will not be redacted. Members of the public are not required to provide personal identifying information when they communicate with the Board of Supervisors and its committees. All written or oral communications that members of the public submit to the Clerk's Office regarding pending legislation or hearings will be made available to all members of the public for inspection and copying. The Clerk's Office does not redact any information from these submissions. This means that personal information—including names, phone numbers, addresses and similar information that a member of the public elects to submit to the Board and its committees—may appear on the Board of Supervisors website or in other public documents that members of the public may inspect or copy.

Print Form

Introduction Form

By a Member of the Board of Supervisors or the Mayor

RECEIVED
BOARD OF SUPERVISORS
SAN FRANCISCO

2015 JUL -7 PM 4:50
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 []

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 Kim

Subject:

Annual Housing Balance Report

The text is listed below or attached:

Hearing from the Planning Department to present report findings from the inaugural Housing Balance report.

Signature of Sponsoring Supervisor: 

For Clerk's Use Only: