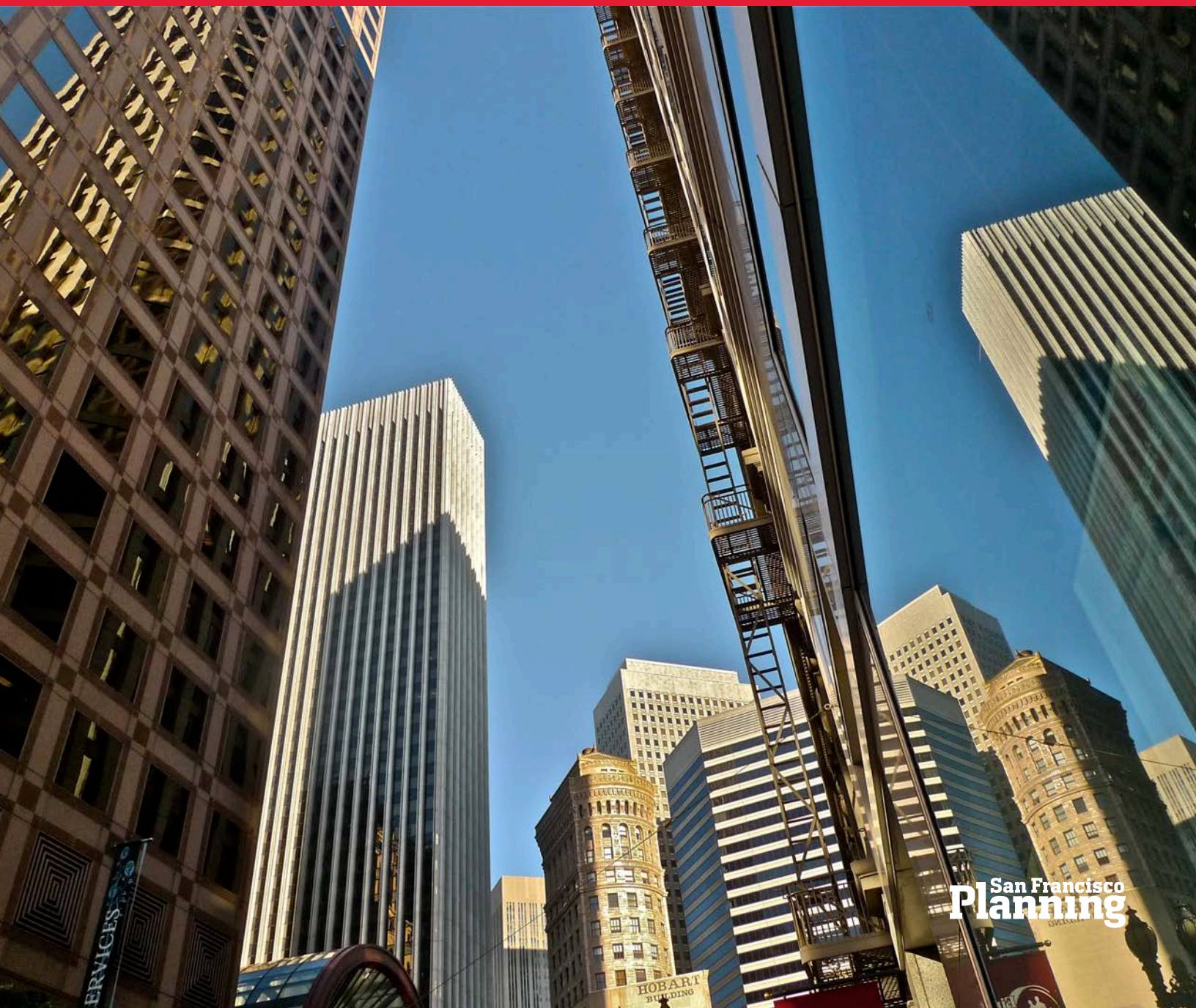


2014 DOWNTOWN PLAN MONITORING REPORT



This report was prepared from information received from a number of different sources, including the US Census, the State of California Employment Development Department, the Association of Bay Area Governments (ABAG), the City & County of San Francisco Office of the Controller and the San Francisco Center for Economic Development. Transit ridership data is provided by the San Francisco Municipal Transportation Agency (SFMTA), Bay Area Rapid Transit (BART), Caltrain and AC Transit.

Copies of this report can be downloaded from the Publications & Reports link at the Planning Department's web site at <http://www.sfplanning.org>.

A limited number of copies are available for purchase from the Planning Department, 1650 Mission Street, Suite 400, San Francisco, CA 94103. Copies may also be reviewed at the Government Information Center on the fifth floor of the San Francisco Main Library.

Department Staff Contact for this report is Paolo Ikezoe, (415) 575-9137, paolo.ikezoe@sfgov.org.



2014 DOWNTOWN PLAN 5 YEAR MONITORING REPORT

San Francisco Planning Department

July 2015





TABLE OF CONTENTS

Introduction	01
Highlights	02
Part I: Employment and Land Use	15
Employment	16
Land Use and Commercial Space	20
Commercial Vacancy	22
Looking Ahead: Commercial Space and Employment	24
Part 2: Housing, Transportation and Open Space	27
Housing	28
Transportation and Commuting	29
Open Space, POPOS and Public Art	35
Looking Ahead: Housing and Population	36
Part 3: Taxes and Fees	38
Part 4: Historic Preservation	44
Historic Preservation	45
Downtown Rehabilitation Projects	47
Inclusionary Housing	33
Affordability of Market Rate Housing	34
Affordable Housing Acquisition and Rehabilitation	35
Part 5: The Future of Downtown	51
Transbay Terminal Area	54
Rincon Hill	56
Central SOMA	58
Appendices	60

TABLES

Table 1.1A Regional Employment, 2008-2014	16
Table 1.1B Average Annual Number of Jobs, Citywide and Downtown C-3, 2008-2014	18
Table 1.2 Existing Office Space, 2008-2014	20
Table 1.3. Commercial Space Added in C-3 Districts, 2008-2014	21
Table 1.4. Office to Residential Conversions, 2008-2014 and in the Pipeline	21
Table 1.5A Office Vacancy, 2008-2014	22
Table 1.5B Retail Vacancy, 2008-2014	23
Table 1.5C Hotel Occupancy and Average Daily Rate, 2008-2014	23
Table 1.6 Commercial Pipeline	24
Table 1.7. Employment Projections, 2010-2040	25
Table 2.1 Housing Production, 2008-2014	28
Table 2.2A Journey to Work (People who work anywhere in SF)	30
Table 2.2B Journey to Work (People who work in Downtown SF)	30
Table 2.2C Journey to Work (San Francisco Residents)	31
Table 2.2D Journey to Work (Downtown San Francisco Residents)	31
Table 2.3A Muni Ridership, 2008-2014	33
Table 2.3B BART Ridership, 2008-2014	33
Table 2.3C Caltrain Ridership, 2008-2014	33
Table 2.3D AC Transit Ridership, 2008-2014	33
Table 2.4 Vehicle Occupancy, 2009-2013	34
Table 2.5 Net Parking Change in Downtown San Francisco, 2008-2014	34
Table 2.6 POPOS and Public Art	35
Table 2.7 Housing Pipeline	36
Table 2.8 Household Projections	37
Table 3.1 Jobs Housing Linkage Fees Collected, FY2008-2014	39
Table 3.2 Transit Impact Development Fees Collected, FY2008-2014	39
Table 3.3 Downtown Park Fees Collected, FY2008-2014	40
Table 3.4 Childcare Fees Collected, FY2008-2014	40
Table 3.5 Business Taxes Collected, 2008-2014	41
Table 3.6 Property Taxes Collected, 2008-2014	42
Table 3.7 Sales Taxes Collected, 2008-2014	42
Table 3.8 Hotel Taxes Collected, 2008-2014	43
Table 4.1 Major and Minor Permits to Alter, Article 11 Buildings, FY2008-2014	50
Table 4.2 Certificates of Appropriateness, Article 10 Buildings, FY2008-2014	50
Table 4.3 Trasfer of Development Rights Summary, FY2008-2014	50
Table 5.1A Transit Center District Open Space Impact Fees Collected, FY2012-2014	55
Table 5.1B Transit Center District Transportation and Street Improvement Fees Collected, FY2012-2014	55
Table 5.1C Transbay Pipeline	55
Table 5.2A Rincon Hill Community Infrastructure Impact Fees Collected, FY2008-2014	56
Table 5.2B SoMa Community Stabilization Fees Collected, FY2008-2014	56
Table 5.2C Rincon Hill Housing Production	57
Table 5.2D Rincon Hill Pipeline	57
Table 5.3 Central SOMA Plan	59

MAPS

Map 1.	C-3 Districts and Priority Development Areas	25
Map 2.	C-3 Districts and Census Tracts	29
Map 3.	New Montgomery - Mission - Second Street Conservation District	46
Map 4.	C-3 Districts and Recent Planning Efforts	53
Map 5.	Transbay Redevelopment Areas and Transit Center District Plan Area	54
Map 6.	Central Soma Plan Area	58

APPENDIX TABLES

Table A-1.	Large Office Approvals, 2008-2014	62
Table A-2.	Small Office Approvals, 2008-2014	64
Table A-3.	Downtown Fees Collected, 1986-2014	65
Table A-4.	Downtown Park Fees Collected, 1986-2014	66
Table A-5.	Child Care Fees Collected, 1986-2014	67

INTRODUCTION: ABOUT THE 2014 DOWNTOWN PLAN

The *Downtown Plan*, adopted in 1984 by the San Francisco Planning Commission, contains objectives and policies to guide decisions impacting Downtown San Francisco. It includes seven sections: Space for Commerce, Space for Housing, Open Space, Preserving the Past, Urban Form, Moving About and Seismic Safety. The *Plan* details development guidelines and public policy actions, and created requirements for new requirements and programs to improve public services and infrastructure.

The *Plan*, through section 10E of the Administrative Code, requires annual monitoring reports covering a number of key employment, development, housing and transportation indicators. A detailed report is also required every five years, assessing the City's success towards meeting the *Plan's* goals. This five year report presents data covering 2008 to 2014.

The *Downtown Plan* continues to play a major role in the development of downtown San Francisco, the largest and most densely concentrated employment and retail hub in the region. The *Plan's* policies are aimed at accommodating employment growth and guiding development within the limits of existing urban support systems, so that new and existing residents, workers and businesses will not be adversely impacted. As it enters its fourth decade, the *Plan's* continued challenge is to manage expected economic growth, provide housing and develop transportation and other necessary support services, while building a quality environment.

The housing, transportation and open space goals are among the most important in the *Downtown Plan*. The *Plan* states that without sufficient and appropriate housing to serve new commercial development, local housing costs would increase, thereby compromising the vitality of downtown. The *Plan* also states that if employment growth increases the number of cars downtown, thereby significantly increasing traffic, the area's attractiveness and livability could be affected adversely. As a result, the *Plan* contains various targets relating to these policy issues.

Presuming that significant employment and office development growth would occur, the *Downtown Plan* requires new commercial development to support associated urban service improvements, including specific programs for housing, transportation, open space and art.

The *Downtown Plan Monitoring Report* is required to cover the following topics:

- » Employment
- » New office space approved, under construction, and completed
- » Office, retail and hotel vacancy rates
- » Local and regional business trends
- » New housing production
- » Changes in Downtown parking supply
- » Vehicle occupancy rates
- » Peak period transit ridership and capacity
- » Tax revenues from office, retail and hotel space
- » Collection and use of Jobs Housing Linkage (JHLF) and Transit Impact Development (TIDF) Fees

In addition, this report contains additional sections, including Historic Preservation and Open Space, which address other important goals regarding the character and livability of downtown San Francisco. As the *Downtown Plan* enters its fourth decade, this report highlights some of the planning efforts the City has and is currently undertaking to implement the *Plan's* goals and ensure the continued success of downtown San Francisco as a world-class employment, retail and visitor/tourism district.

HIGHLIGHTS:
DOWNTOWN SF
2008–2014
SNAPSHOT

SUMMARY OF HIGHLIGHTS

The 2008–2014 reporting period covers several turbulent years for the city and region, and includes both the depths of the 2008 global financial crisis and ensuing recession as well as the current recovery which has brought the city to the highest levels of employment in its history.

Employment and Commercial Space

By almost any measure, the city's economy is booming and downtown San Francisco appears to be sharing in, if not driving, much of that growth. Since 2008, downtown (and the city as a whole) has seen record employment growth, declining commercial vacancy rates, dramatic increases in tax revenues and impact fees collected. Downtown San Francisco is home to roughly 40% of the city's jobs, and saw 14% growth in jobs from 2008 to 2014 (vs. 10% growth for the city overall).

Housing, Transportation and Open Space

Housing production fluctuated greatly over the 2008 to 2014 period as the effects of the recession caused many residential projects to stall or be cancelled. From a low in 2011, when just 340 net new units were brought online in the city, housing production has rebounded, with nearly 3,500 units produced in 2014. Almost 14,400 units were added to the city's housing stock between 2008 and 2014, with just over 30% built in the C-3 or adjacent Downtown Residential (DTR) districts. This trend, along with the potential addition of over 7,600 new units of housing in and around Downtown in the next several years, will continue to increase the Downtown residential population and vitality of the district.

Transit ridership has generally tracked employment, falling in 2009 and then growing at a rapid rate after 2010. In 2014, both BART and Caltrain saw record ridership, with a sizeable portion of that growth coming from downtown San Francisco stations. Available transportation data suggests that transit, walking and biking account for an increasing share of commute trips to downtown jobs, while solo driver commutes have fallen. The data also indicates that carpooling continues to

decrease in popularity, but this could be due to a larger nationwide trend, an increase in the use of other forms of transportation, or an increase in the number of individuals working from home.

Taxes and Fees Collected

The improving economy has translated to major increases in business, property, sales and hotel taxes collected, while increased development downtown and throughout the city has brought in millions of dollars in impact fee revenues in recent years.

Historic Preservation

Major developments in the arena of Historic Preservation have included the formation of a separate Historic Preservation Commission and the completion of a multi-year historic survey as part of the Transbay Center District Plan. Over 300 Certificates of Appropriateness and Permits to Alter were issued for historically rated properties located in the downtown area between 2008 and 2014.

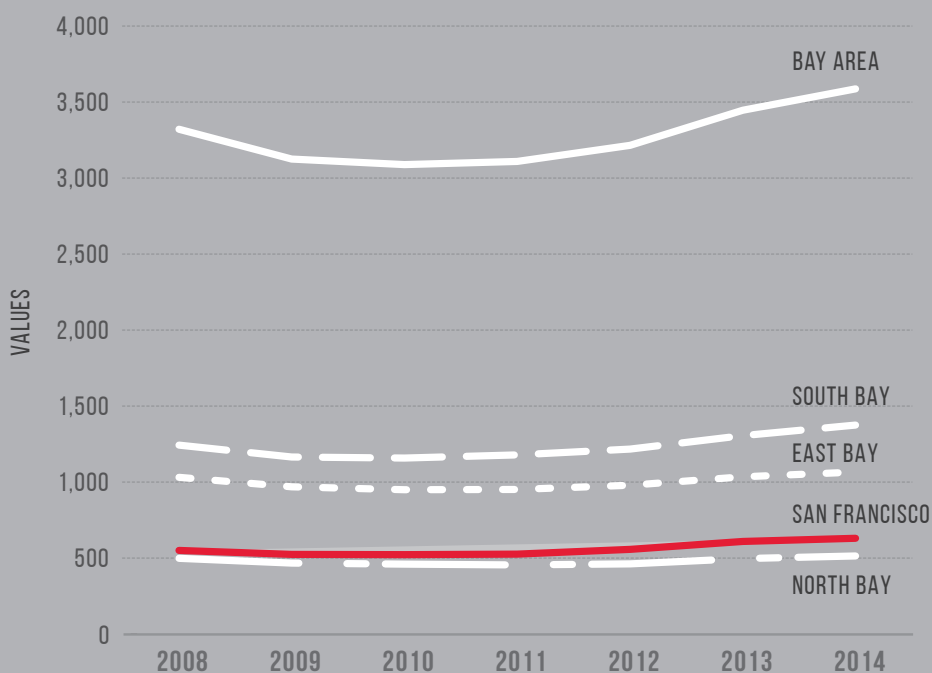


Credit: Sergio Ruiz, "Transbay Transit Center Tour" June 25, 2013 via Flickr, Creative Commons Attribution

REGIONAL EMPLOYMENT



REGIONAL EMPLOYMENT TRENDS, 2008–2014



BAY AREA JOBS

3.3M	3.6M ↑ 8%
2008	2014

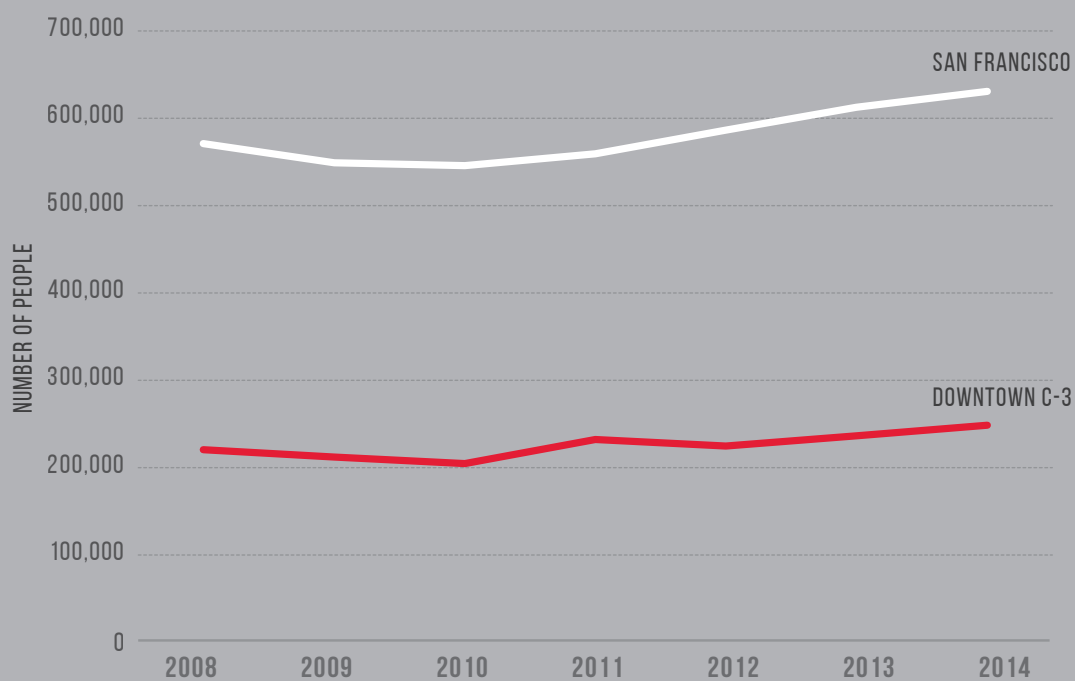
SAN FRANCISCO JOBS

570K	630K ↑ 10%
2008	2014

EMPLOYMENT IN SAN FRANCISCO

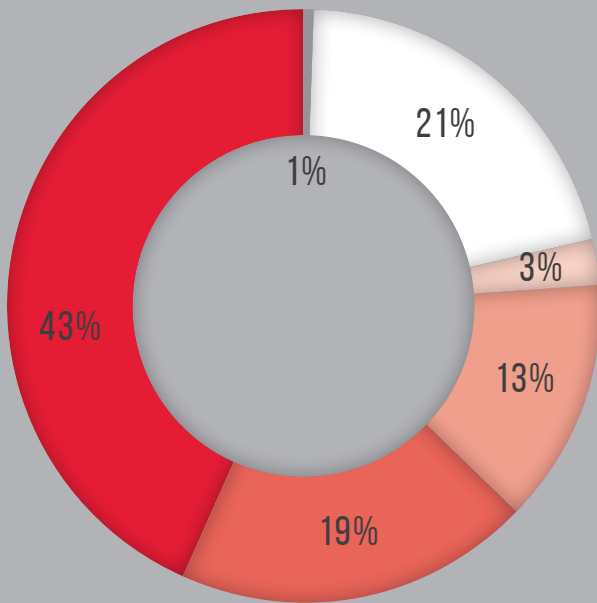


EMPLOYMENT IN SAN FRANCISCO, DOWNTOWN AND CITYWIDE, 2008–2014



SAN FRANCISCO AND DOWNTOWN JOBS BY SECTOR

SAN FRANCISCO JOBS BY SECTOR, 2014

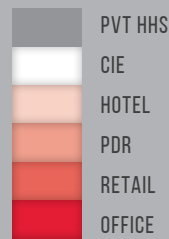


630,500

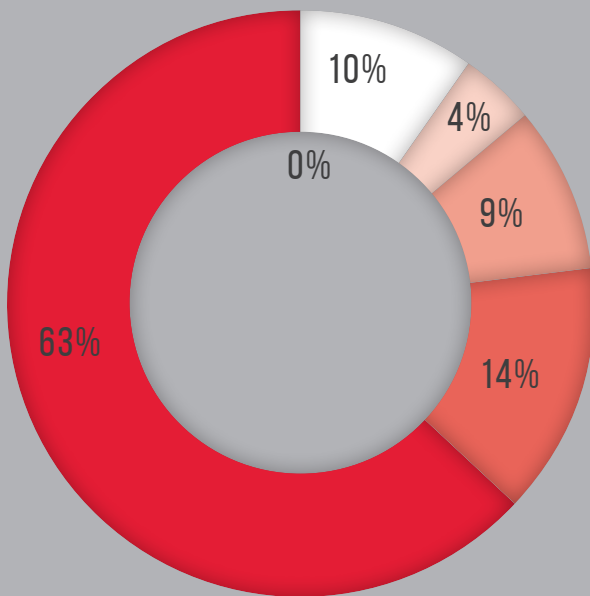
2014

↑ 10%

CHANGE FROM 2008



DOWNTOWN C-3 JOBS BY SECTOR

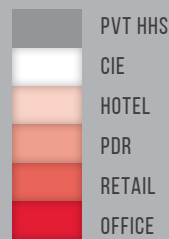


248,700

2014

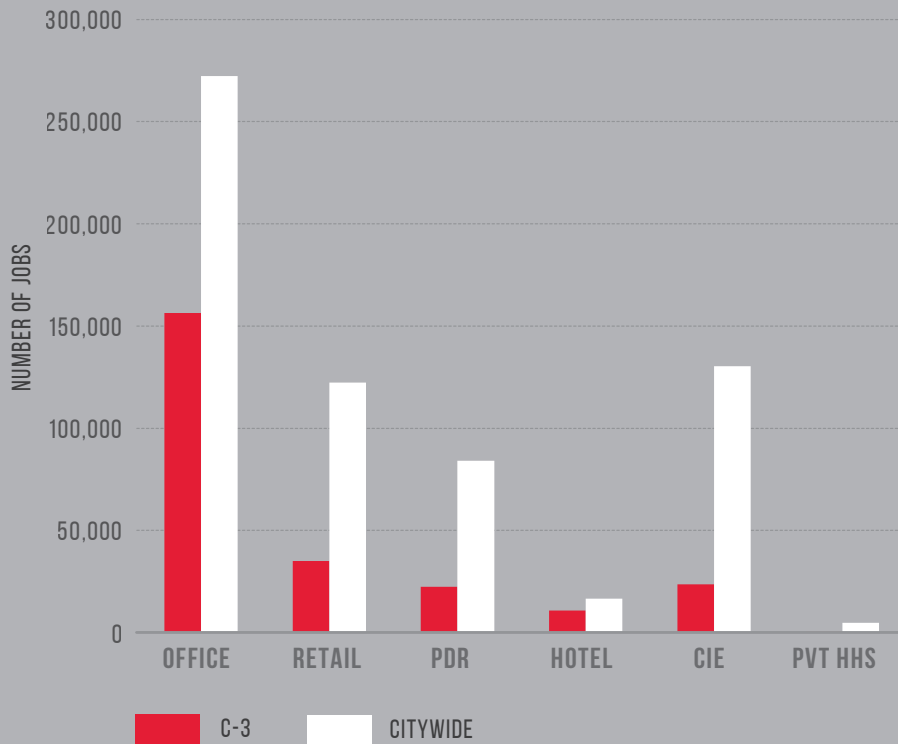
↑ 14%

CHANGE FROM 2008

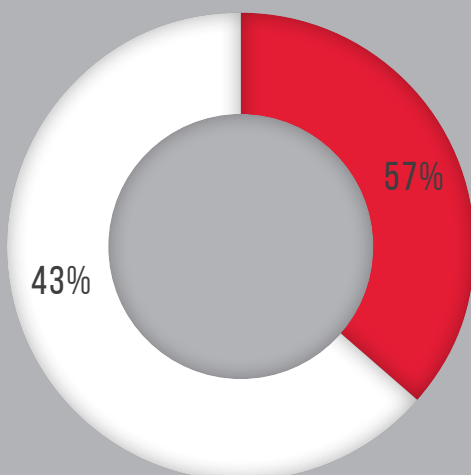


SAN FRANCISCO AND DOWNTOWN JOBS BY SECTOR

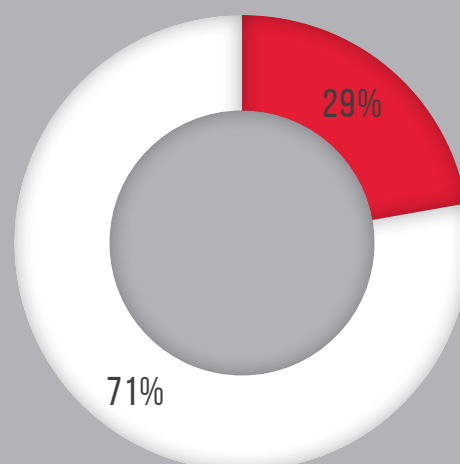
JOBS BY SECTOR, DOWNTOWN C-3 VS. CITYWIDE



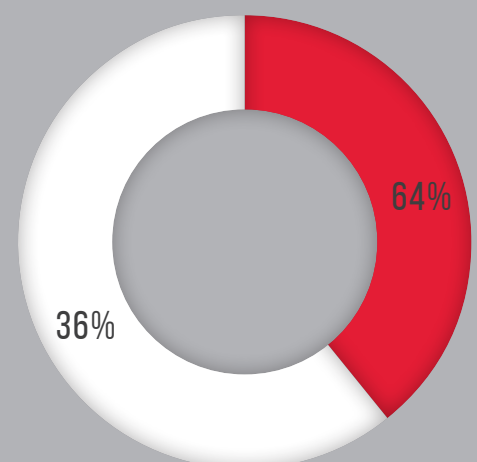
OFFICE JOBS



RETAIL JOBS

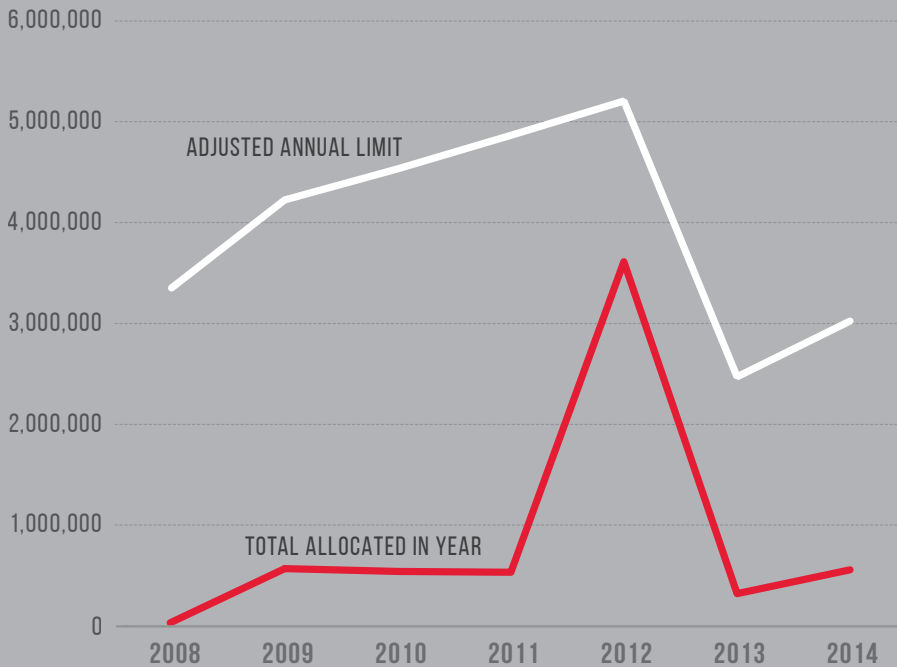


HOTEL JOBS



DEVELOPMENT

PROP M ALLOCATIONS, 2008–2014



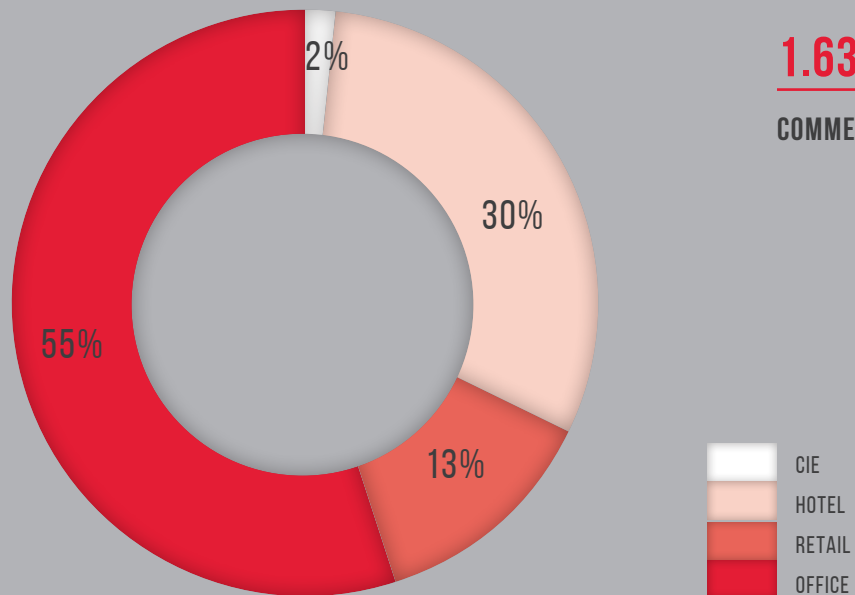
3.02 MILLION SF

CURRENTLY AVAILABLE

6.14 MILLION SF

OFFICE SPACE ALLOCATED 08-14

COMMERCIAL SPACE ADDED DOWNTOWN, 2008-2014

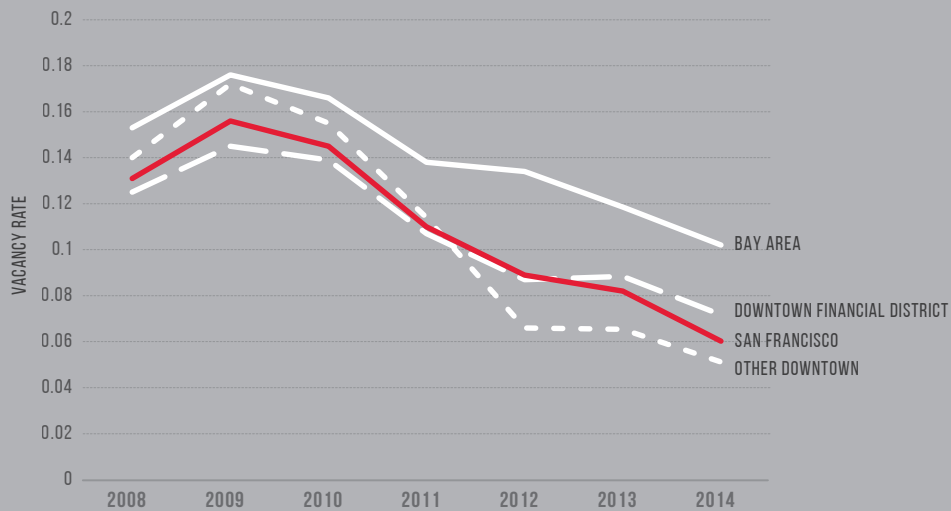


1.63 MILLION SQ FT

COMMERCIAL SPACE ADDED 08-14

COMMERCIAL VACANCY

OFFICE VACANCY, 2008–2014



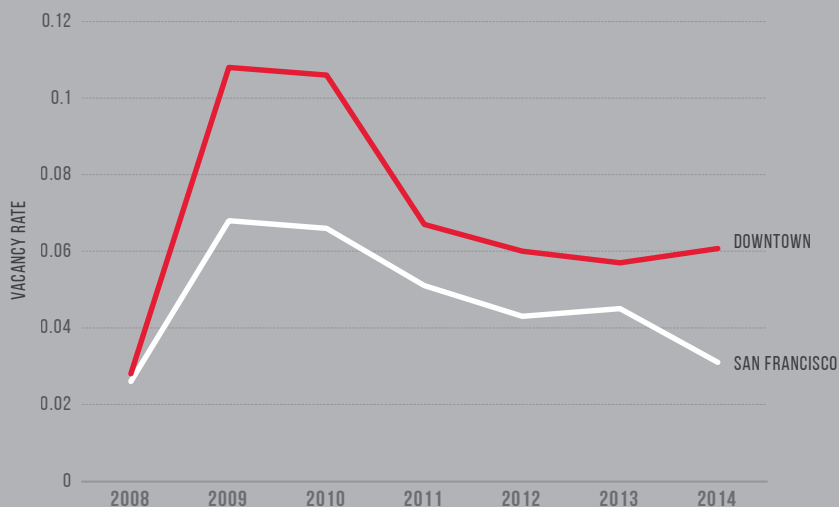
13.1% **6.0%**

2008 **2014**

12.5% **7.2%**

2008 **2014**

RETAIL VACANCY, 2008–2014



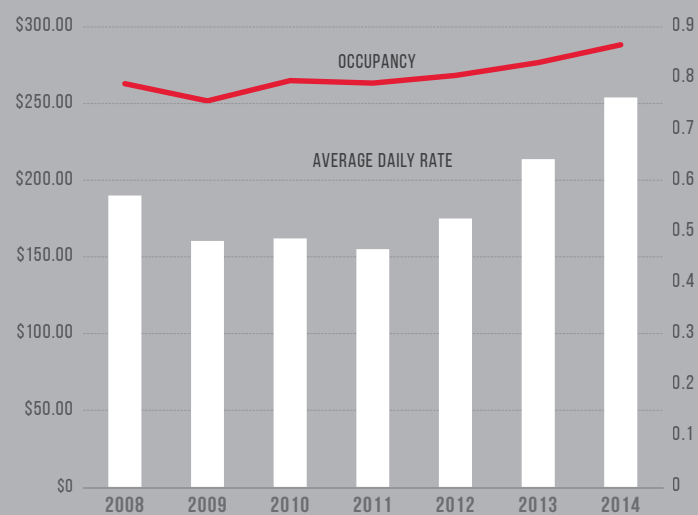
2.6% **3.1%**

2008 **2014**

2.8% **6.1%**

2008 **2014**

HOTEL OCCUPANCY AND AVERAGE DAILY RATES, 2008–2014



79% **87%**

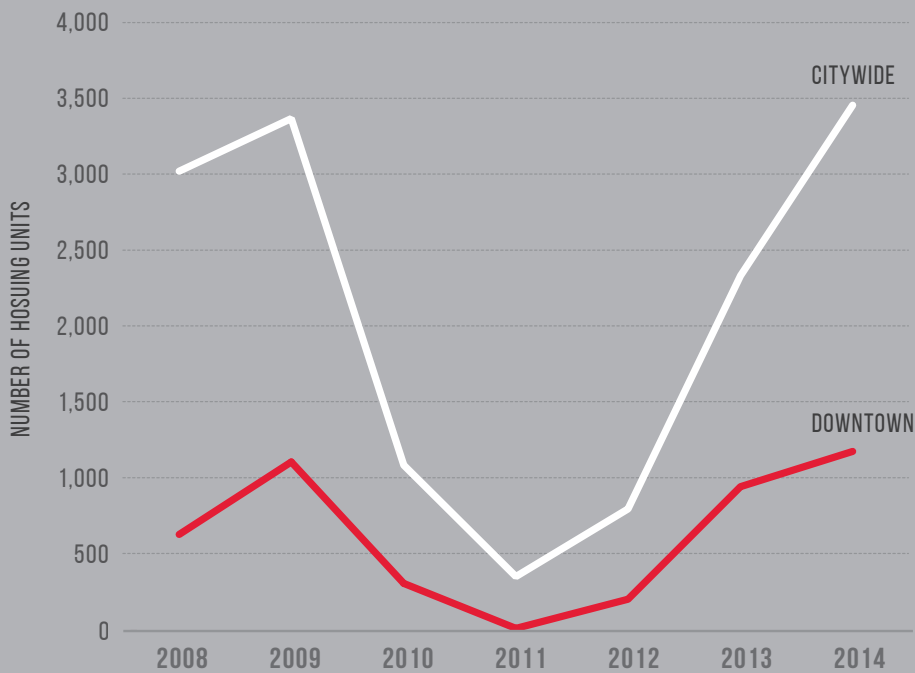
2008 **2014**

\$190 **\$254**

2008 **2014**

HOUSING PRODUCTION

HOUSING UNITS CONSTRUCTED, 2008–2014



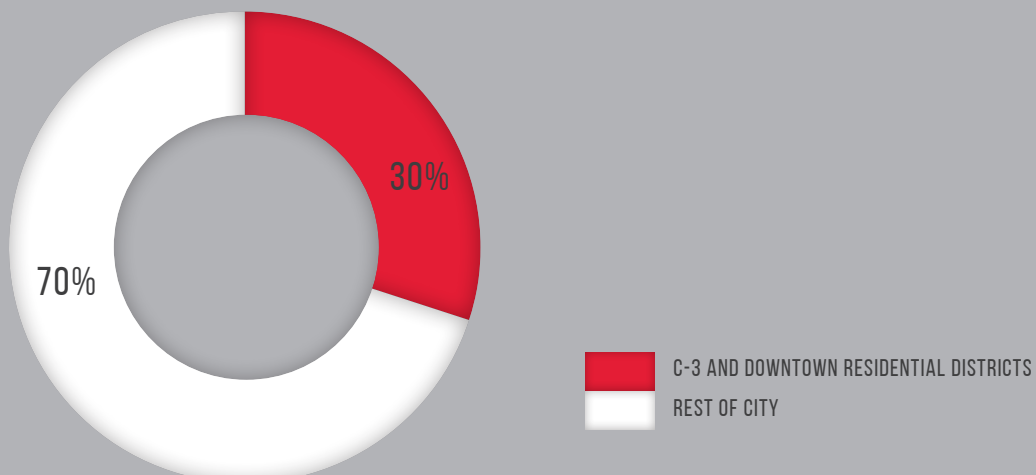
14,400 UNITS

CITYWIDE 2008–2014

4,350 UNITS

DOWNTOWN 2008–2014

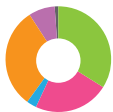
HOUSING PRODUCTION, 2008–2014



TRANSPORTATION AND COMMUTING

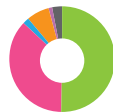
MODE SPLIT C-3 RESIDENTS C-3 WORKERS

2013	Mode	2010
34%	TRANSIT	51%
25%	CAR	37%
4%	BIKE	2%
29%	WALK	7%
6%	WORK AT HOME	1%
2%	OTHER	3%



2013

2010



TRANSIT RIDERSHIP

Downtown Transit Boardings
(Average Weekday)

Citywide



PEAK-PERIOD TRIPS TO/FROM DOWNTOWN

159,700 645,900 -



AT DOWNTOWN BART STATIONS

132,500^{↑3%} 399,100^{↑2%}



AT 4TH & KING STATION

13,600^{↑12%} 58,200^{↑11%}



TRANSBAY LINES

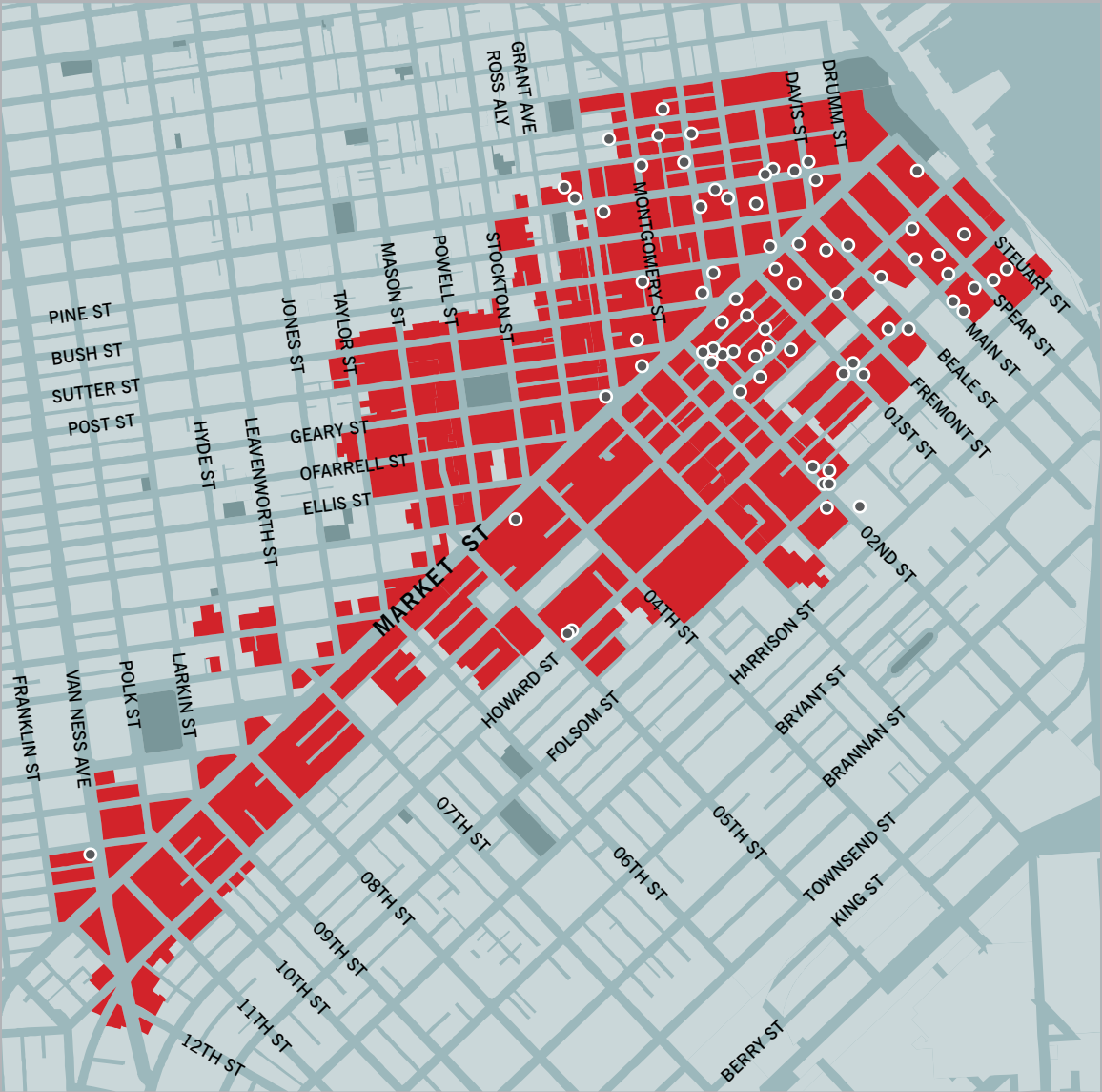
13,200^{↓5%} 196,800^{↑2%}

OPEN SPACE AND FEES

PRIVATELY-OWNED PUBLIC OPEN SPACE (POPOS) & ART

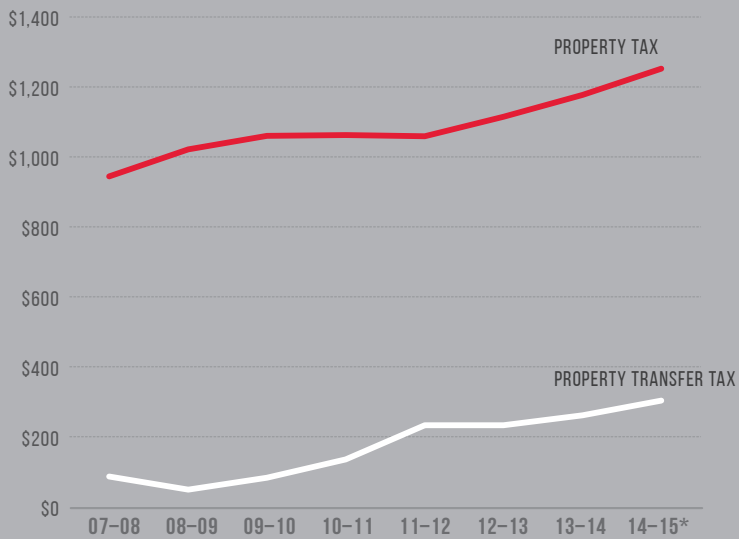
POPOS		Public Art
82	DOWNTOWN	23
86	CITYWIDE	NA

○ Privately Owned Public Open Spaces (POPOS) ■ C-3 Districts

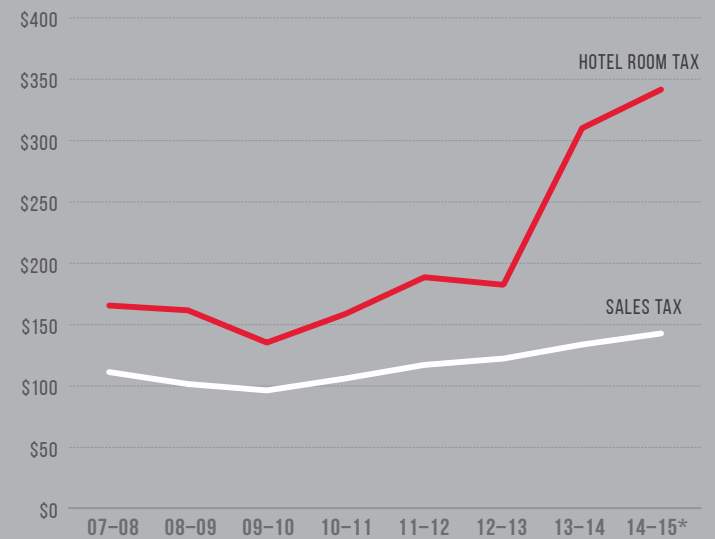


TAXES AND FEES

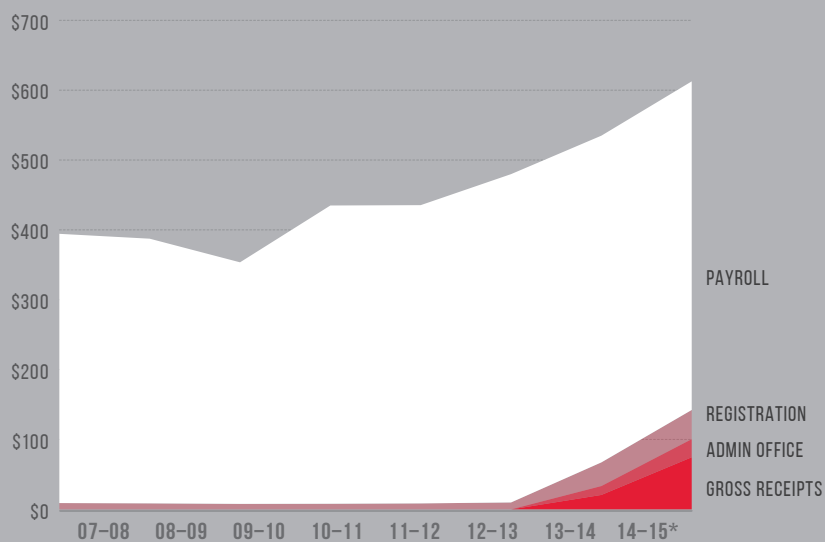
PROPERTY TAX COLLECTIONS



SALES AND HOTEL ROOM TAX COLLECTIONS

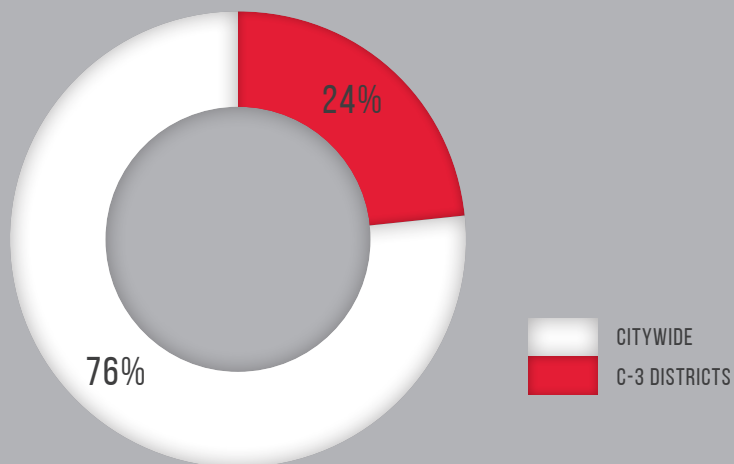


BUSINESS TAX COLLECTIONS



THE PIPELINE

OFFICE PIPELINE



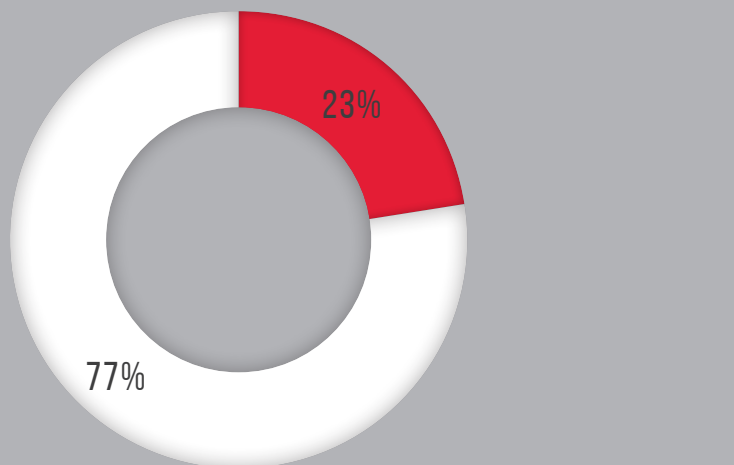
11.8 MILLION SF

CITYWIDE

3.6 MILLION SF

DOWNTOWN

RETAIL PIPELINE



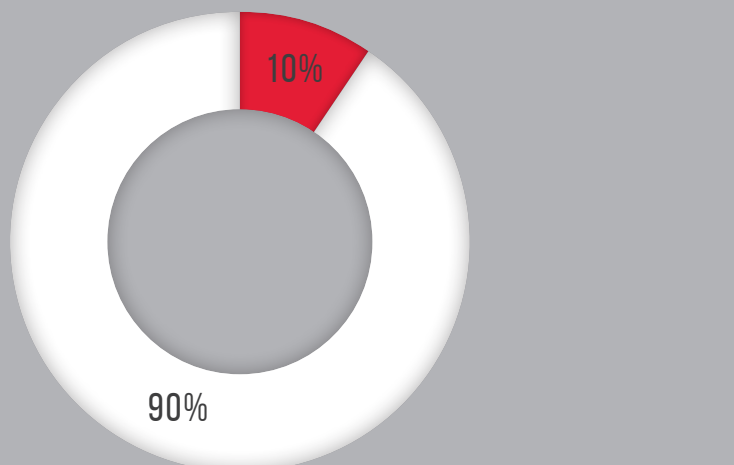
2.9 MILLION SF

CITYWIDE

850,000 SF

DOWNTOWN

HOUSING PIPELINE



50,490 UNITS

CITYWIDE

5,370 UNITS

DOWNTOWN

PART I:

DOWNTOWN EMPLOYMENT AND LAND USE

Employment

The *Downtown Plan* envisions Downtown San Francisco as the city's and the region's primary office, retail and hotel district, and encourages compact, high-density office development while ensuring that employment growth does not overwhelm surrounding neighborhoods.

The 2008-2014 reporting period covers several turbulent years for the city and region, and includes both the depths of the 2008 global financial crisis and ensuing recession as well as the current recovery, which has brought the city to the highest levels of employment in its history.

Regional Overview

- » The nine-county Bay Area appears to have rebounded from the effects of the 2008 recession, which caused employment to dip to less than 3.1 million in 2010. The region now counts almost 3.6 million jobs, a 4% increase since last year and an 8% increase from 2008.
- » Between 2008 and 2014, employment in San Francisco grew faster rate (15%) than all other parts of the region, outpacing the regionwide growth rate of 8%. Due to that faster growth, San Francisco's share of regional employment has steadily increased, from 16.5% in 2008 to 17.6% in 2014.

TABLE 1.1A
Regional Employment, 2008–2014

Total Number of Jobs (000s)

Sub-Region	2008	2009	2010	2011	2012	2013	2014	2013-2014 #	2008-2014 #
North Bay	497.8	467.3	459.2	453.8	461.9	497.0	514.3	17.3	16.5
East Bay	1,031.1	968.0	949.8	950.6	978.7	1,035.4	1,066.4	31.0	35.3
South Bay	1,243.8	1,165.5	1,158.2	1,178.6	1,217.6	1,305.9	1,375.4	69.5	131.6
San Francisco	549.4	524.3	521.7	526.5	557.9	608.6	630.5	21.9	81.1
Regional Total	3,322.1	3,125.1	3,088.9	3,109.5	3,216.1	3,446.9	3,586.6	139.7	264.5
SF % of Region	16.5	16.8	16.9	16.9	17.3	17.7	17.6	15.7	30.7

Percentage Change

Sub-Region	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2008-14
North Bay	-6.1	-1.7	-1.2	1.8	7.6	3.5	3.3
East Bay	-6.1	-1.9	0.1	3.0	5.8	3.0	3.4
South Bay	-6.3	-0.6	1.8	3.3	7.3	5.3	10.6
San Francisco	-4.6	-0.5	0.9	6.0	9.1	3.6	14.8
Regional Total	-5.9	-1.2	0.7	3.4	7.2	4.1	8.0

Source: California Employment Development Department

San Francisco and Downtown

- » Between 2008 and 2014, employment in San Francisco grew by roughly 10% (55,000 jobs).
- » Since the lowest point of the recession in 2010, the city has added over 85,000 jobs for a current total of just over 630,000, the highest in the city's history.
- » San Francisco continued to see strong employment growth between 2013-2014, adding almost 16,600 jobs (a 2.7% increase).
- » Since 2008, office jobs grew at the fastest rate (24%), followed by retail (19%). PDR jobs appear to have stabilized, while Hotel and CIE jobs declined over the period.
- » The downtown C-3 districts counted 248,700 jobs in 2014, a 6% increase from last year and a 14% increase from 2008. Over half of the jobs added since 2008 have been located downtown.
- » Roughly 40% of the city's jobs are located downtown, a proportion that has held relatively steady throughout the period.
- » Office jobs make up by far the largest proportion (60%) of downtown jobs. Citywide, 43% of jobs are in the office sector.

TABLE 1.1B**Annual Average Number of Jobs, Citywide and Downtown C-3 Districts, 2008–2014**

Land Use	2008	2009	2010	2011	2012	2013	2014
	Citywide						
Office	221,250	211,885	211,050	218,837	231,908	244,262	272,208
Retail	103,443	98,278	98,139	100,598	106,305	111,754	122,446
PDR	84,710	76,727	72,967	72,466	75,637	78,234	84,142
Hotel	19,527	17,828	17,568	17,795	17,400	18,136	16,719
CIE	141,848	124,831	126,208	129,015	132,851	156,157	130,268
Private Households	–	19,443	19,819	20,327	22,156	4,113	4,756
TOTAL	570,778	548,992	545,751	559,038	586,257	612,656	630,539

Land Use	2008	2009	2010	2011	2012	2013	2014
	Downtown C-3 Districts						
Office	133,480	127,090	124,810	139,162	137,875	144,496	156,298
Retail	29,210	26,500	25,720	27,484	28,019	30,286	34,993
PDR	20,370	21,740	17,320	18,505	20,054	21,380	22,429
Hotel	12,650	11,160	11,620	12,077	11,339	11,611	10,769
CIE	24,760	23,730	23,410	33,571	25,384	28,037	23,687
Private Households	-	1,820	1,840	1,676	1,935	578	523
TOTAL	220,470	212,040	204,720	232,475	224,606	236,388	248,698
% of Citywide	39%	39%	38%	42%	38%	39%	39%

Source: California Employment Development Department

2013-2014		2008-2014	
#	%	#	%
27,946	13%	50,958	24%
10,692	10%	19,003	19%
5,908	7%	-568	-1%
-1,417	-7%	-2,808	-16%
-25,889	-18%	-11,580	-9%
-	-	-	-
17,240	3%	55,005	10%

2013-2014		2008-2014	
#	%	#	%
11,802	9%	22,818	18%
4,707	16%	5,783	22%
1,049	5%	2,059	12%
-842	-7%	-1,881	-16%
-4,350	-18%	-1,073	-5%
-	-	-	-
12,365	6%	27,705	14%
72%		50%	

Existing Office Space

- » Close to two-thirds of the city's office space is located in the Downtown C-3 districts.
- » San Francisco counts over 111 million square feet of office space. Since 2008, citywide office space has grown by 1.2%.

TABLE 1.2
Existing Office Space, 2008–2014

Area	2008	2009	2010	2011	2012	2013	2014	Net Change 2008-2014
San Francisco	110.1	110.7	110.7	110.7	110.6	111.1	111.4	1.2%
C-3 Districts	70.0	70.2	70.1	69.8	69.8	70.3	70.5	0.7%
% in C-3	64%	63%	63%	63%	63%	63%	63%	

Source: CoStar Realty Group, Planning Department

Commercial Space Added in C-3 Districts

- » Just over 1.6 million square feet of commercial space was added in 53 projects in the downtown C-3 districts between 2008 and 2014.
- » Office space comprised the largest amount (897,940 sf) of new space coming online, followed by Visitor (496,290 sf) and Retail (208,150sf) spaces.

Office to Residential Conversions

- » Conversion to residential uses resulted in the loss of almost 473,000 square feet of commercial space in the C-3 districts. Projects in the pipeline propose to convert an additional 742,000 square feet of downtown commercial space to residential uses.
- » Citywide, almost 940,000 square feet of commercial space was converted to 1,741 residential units between 2008 and 2014. Pipeline data indicates

TABLE 1.3
Commercial Space Added in C-3, 2008–2014

Land Use	Square Feet
Office	897,938
Retail	208,147
CIE	31,099
Visitor	496,286
Total	1,633,470

Source: Planning Department

TABLE 1.4
Office to Residential Conversions, 2008–2014 and in the Pipeline

Year	2008-2014		In the Pipeline	
	C-3	Citywide	C-3	Citywide
Office Space	-472,690	-948,421	-729,771	-897,883
Residential Units	741	1,839	1,464	2,980

Source: Planning Department

Commercial Vacancy

Proposition M, passed in 1986, limited the amount of new office space that could be approved each year to 950,000 square feet. One of the primary goals of this policy was to account for the hugely cyclical nature of the office market and protect against large fluctuations in vacancy rates during boom and bust periods.

Commercial vacancy closely tracked employment trends over the 2008-2014 period. Office, retail and hotel vacancies peaked in 2009 and remained high through 2010 before showing signs of recovery in 2011. The resurgent economy has led to strong demand for office and retail space as well as hotel rooms; vacancy rates in San Francisco are now among the lowest in the nation.

Office Vacancy

- » As of 2014, the vacancy rate in San Francisco's office market was 6%, far below the regional vacancy rate of 10.2%. Citywide office vacancy has fallen 2.2 percentage points in the previous year, and by over 7 percentage points since 2008.
- » The core Downtown Financial District's vacancy rate was 7.2%, while areas immediately surrounding saw a rate of 5.1%.

TABLE 1.5A
Office Vacancy, 2008–2014

Area	2008	2009	2010	2011	2012	2013	2014	Net Change	
								2013-14	2008-14
San Francisco	13.1%	15.6%	14.5%	11.0%	8.9%	8.2%	6.0%	-2.2pts	-7.1pts
Downtown Financial District	12.5%	14.5%	13.9%	10.7%	8.7%	8.8%	7.2%	-1.7pts	-5.3pts
Other Downtown*	14.0%	17.2%	15.5%	11.4%	6.6%	6.5%	5.1%	-1.4pts	-8.9pts
Bay Area	15.3%	17.6%	16.6%	13.8%	13.4%	11.9%	10.2%	-1.7pts	-5.1pts

Source: Cassidy Turley Q4 2014 Office Market Snapshot

*Other Downtown includes Jackson Square, Rincon Hill, Union Square and Yerba Buena sub-districts.

Retail Vacancy

- » Vacancy in the downtown area, which includes the major retail hub at Union Square, was 6.1%.
- » Citywide retail vacancy is currently 3.1%.

Hotel Occupancy and Average Daily Rate

- » San Francisco has approximately 33,750 hotel rooms. Just one new hotel (The InterContinental, with 550 guest rooms) was built between 2008 and 2014.
- » Hotel Occupancy has risen steadily since 2009, to 86.5% in 2014, reflecting strong growth in convention and tourism related activities.
- » The 2014 Average Daily Rate (ADR) for all hotels in San Francisco was \$254, a 35% increase from 2008.

TABLE 1.5B
Retail Vacancy, 2008–2014

Area	2008	2009	2010	2011	2012	2013	2014	Net Change	
								2013-14	2008-14
San Francisco	2.6%	6.8%	6.6%	5.1%	4.3%	4.5%	3.1%	-1.4pts	0.5pts
Downtown*	2.8%	10.8%	10.6%	6.7%	6.0%	5.7%	6.1%	0.4pts	3.3pts

Source: DTZ Retail Terranomics Q4 2014 San Francisco Retail Snapshot

*Downtown includes Financial District, Union Square, Yerba Buena, Jackson Square and Mid-Market sub-districts.

TABLE 1.5C
Hotel Occupancy and Average Daily Rate, 2008–2014

	2008	2009	2010	2011	2012	2013	2014	Net Change	
								2013-14	2008-14
Occupancy	78.9%	75.5%	79.5%	79.0%	80.5%	83.0%	86.5%	3.5pts	7.6pts
Average Daily Rate	\$190	\$160	\$162	\$155	\$175	\$214	\$254	18.8%	33.7%

Source: San Francisco Center for Economic Development

Looking Ahead: Commercial Space

The *Downtown Plan* recognizes that, in order to remain the city and region's prime office, retail and visitor district, Downtown San Francisco needs to offer opportunities for new commercial spaces of all types. The Plan generally guided commercial development and most new office growth in San Francisco to the Downtown C-3 Districts straddling Market Street, but also expanded new commercial development to the South of Market (SoMa) District.

Since the Plan was passed, a major planning effort built on these broad goals to enable millions of square feet of office space surrounding the future Transbay Terminal (Transit Center District Plan). Major redevelopment projects in Mission Bay and Hunters Point, as well as master plans on Treasure Island and Parkmerced also contain significant amounts of future commercial development.

Commercial Pipeline

- » San Francisco has just over 19 million square feet of commercial space in the pipeline, 29% of which is planned for the downtown C-3 districts. Almost 12 million of the citywide pipeline is slated to be office, almost 3 million will be retail, and the remainder will be in PDR and CIE uses.
- » Almost a third of the office space in the pipeline is located in the downtown C-3 districts, with the vast majority (3.9 million square feet) in the C-3-O(SD) district around the future Transbay Terminal.
- » Outside of downtown, office space in the pipeline is spread across various zoning districts, with a significant amount of new office space planned for the Hunters Point-Candlestick Point area.
- » There is roughly 850,000 square feet of retail space in the pipeline for downtown San Francisco. The Parkmerced, Treasure Island and Hunters Point-Candlestick Point master plans all anticipate hundreds of thousands of square feet of new retail space.

TABLE 1.6
Commercial Pipeline

Neighborhood	Total		Office		Retail	
	Sq. Ft.	% of citywide	Sq. Ft.	% of citywide	Sq. Ft.	% of citywide
Downtown C-3	5,450,546	28.6%	3,648,673	30.9%	849,805	29.2%
C-3-O(SD)	4,875,969		3,927,819		338,150	
C-3-O	526,633		409,091		15,832	
C-3-R	254,858		-95,330		141,079	
C-3-S	139,901		58,604		3,297	
C-3-G	-346,815		-651,511		351,447	
Mission Bay	3,019,986	15.9%	509,000	4.3%	0	0.0%
PM, HPCP and TI*	5,574,318	29.3%	3,132,857	26.5%	1,377,836	47.4%
NC Districts	86,811	0.5%	71,495	0.6%	-10,707	-0.4%
Rest of City	4,901,514	25.8%	4,456,563	37.7%	691,021	23.8%
TOTAL	19,033,175	100.0%	11,818,588	100.0%	2,907,955	100.0%

*Parkmerced, Hunters Point-Candlestick Point and Treasure Island
Source: Planning Department

Future Employment Projections

The Association of Bay Area Governments (ABAG) prepares projections of housing and employment throughout the nine county Bay Area, analyzing local zoning capacity and development trends to predict where within the region future residents and jobs will go. Projections are released at the Priority Development Area (PDA) level of geography (refer to Map 1, below).

- » ABAG projects employment in San Francisco to grow from 569,000 to 770,000 jobs by 2040, a 34% increase.
- » The two PDAs covering downtown San Francisco (Downtown-Van Ness-Geary and Transbay Terminal) are projected to grow by 82,300 jobs (25%) by 2040. Together, these PDAs would account for 43% of citywide job growth.

- » Jobs in the Transbay Terminal PDA are projected to almost quadruple to 37,660.

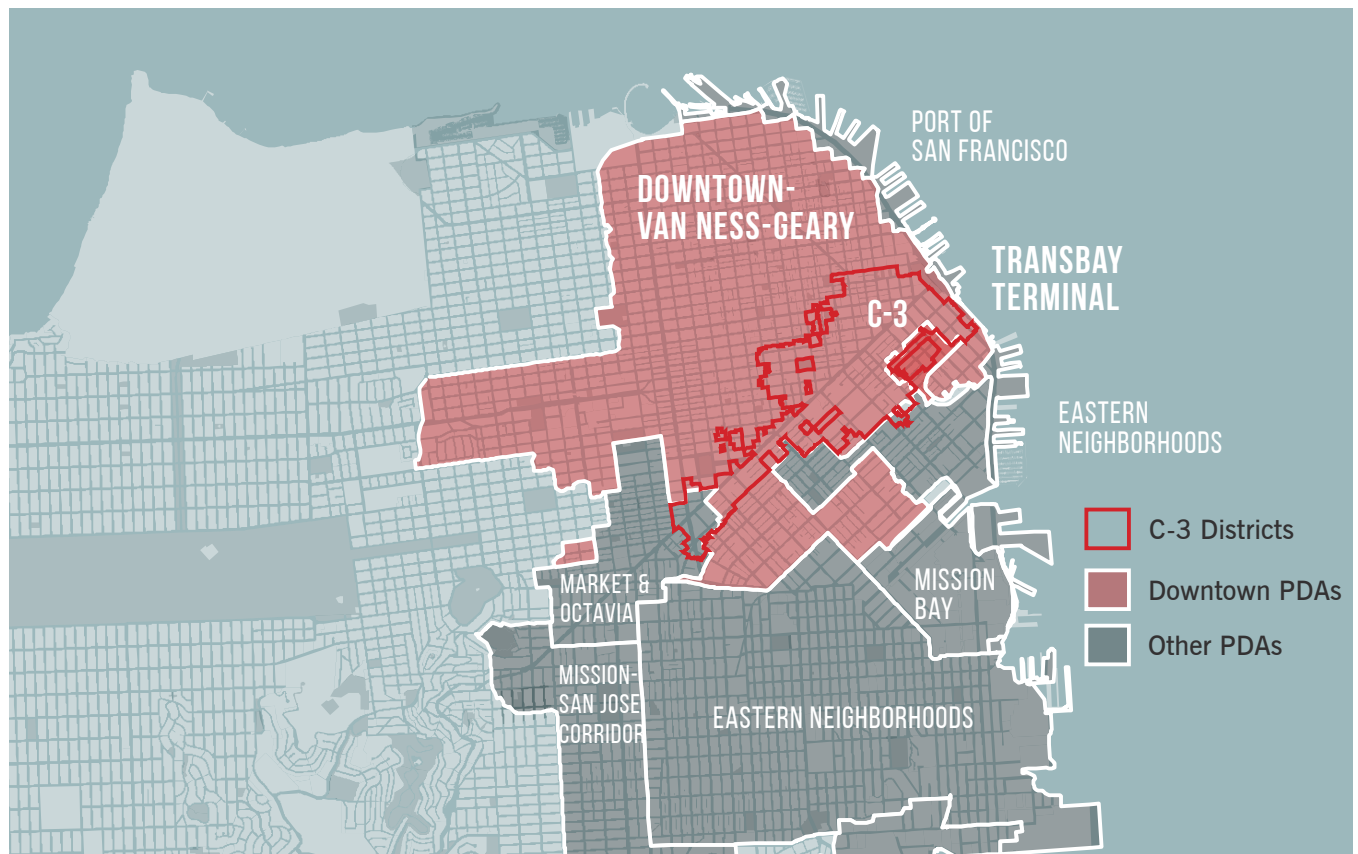
TABLE 1.7
Employment Projections, 2010–2040

Area	2010	2040	2010-2040	
			#	%
Downtown	323,520	405,800	82,280	25%
Downtown-Van Ness-Geary	315,570	368,140	52,570	17%
Transbay Terminal	7,950	37,660	29,710	374%
San Francisco	568,720	759,470	190,750	34%

Source: Association of Bay Area Governments

MAP 1

C-3 Districts and Priority Development Areas (PDAs)





PART 2:

HOUSING, TRANSPORTATION AND OPEN SPACE

Housing

The *Downtown Plan* recognizes the effects that adding thousands of new jobs and millions of square feet of commercial space has on the demand for housing in the city. In addition to discouraging the loss of existing residential units in neighborhoods surrounding downtown to encroaching commercial uses, the Plan calls for increased housing production in and around downtown San Francisco, and suggests measures for new commercial development to cover some of the costs associated with producing new affordable housing.

The Plan specifically calls for a citywide housing production goal of 1,500 units per year, a rate surpassed in four of the past seven years. In 1985, the Plan also prompted the assessment of a fee on large office developments in downtown to fund affordable housing (the Office Affordable Housing Production Program), since expanded citywide to commercial projects with a net addition of 25,000 square feet of more and renamed the Jobs Housing Linkage Program. (See Table 3.1 for more information)

Housing Production

- » In 2014, 3,454 net new housing units were produced in San Francisco. Over a third of those new units were completed in the downtown C-3 districts (777 units) and the adjacent DTR (Downtown Residential) districts (395 units).
- » Between 2008 and 2014, 14,390 units were produced, for an average of 2,055 units per year. Thirty percent (4,340 units) of those units were located downtown.

TABLE 2.1
Housing Production, 2008–2014

Area	2008	2009	2010	2011	2012	2013	2014	08–14
Downtown	625	1,102	301	6	197	941	1,172	4,344
C-3 Districts	625	1,102	293	6	197	495	777	3,495
DTR Districts	-	-	8	-	-	446	395	849
Citywide	3,019	3,366	1,082	348	794	2,330	3,454	14,393
Downtown % of Citywide	21%	33%	28%	2%	25%	40%	34%	30.2%

Source: San Francisco Planning Department, Housing Inventories.

Transportation and Commuting

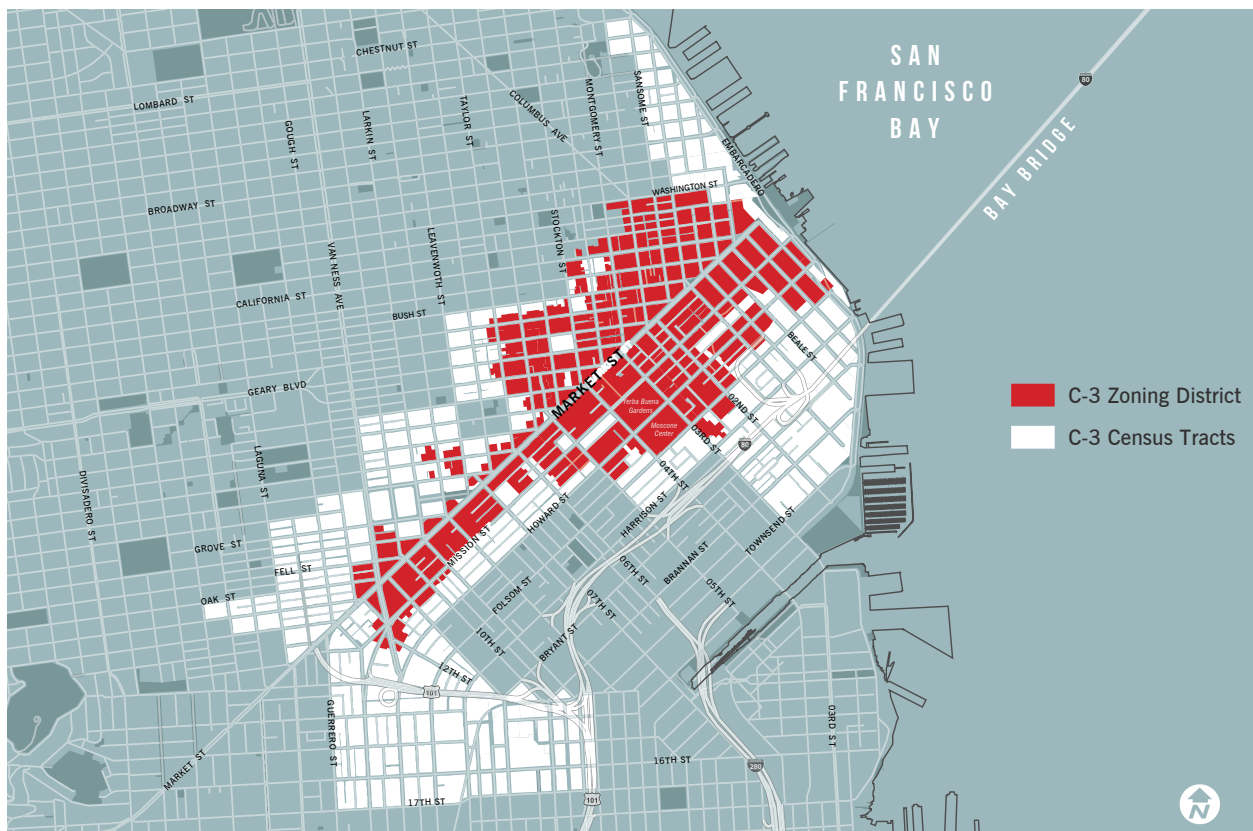
The Downtown Plan commits to developing transit as the primary mode of transportation to and from downtown San Francisco, and to accommodating employment growth without generating additional negative impacts associated with increased auto use, including traffic congestion and environmental pollution. The Plan specified that these goals be met through an increase in transit mode share, an increase in vehicle occupancy, and strict limits on long-term commuter parking.

The Plan includes specific targets for commute mode split (the share of commuters taking transit to work) and vehicle occupancy. It calls for the proportion of downtown commuters taking transit to increase from 64% when the Plan was adopted in 1984 to 70% by 2000. While this specific target has never been achieved, transit, walking and bicycling commuters represent an increasing share of downtown workers, while solo driving to work appears to be declining.

Another goal of the Plan was to encourage car-pooling, with the target of increasing the average vehicle occupancy rate from 1.48 persons per vehicle in 1985 to 1.66 by 2000. Carpooling as a means of commuting has steadily declined nationally over the past decades, and this trend, perhaps coupled with new tolls for carpools on the Bay Bridge, has translated into falling vehicle occupancy.

MAP 2

C-3 Districts and Census Tracts



Journey to Work (Workers)

- » Among those employed in San Francisco, driving to work (whether alone or in a carpool) has declined over the past decade, while commuting via transit, walking and by bicycle have shown steady increases.
- » For the first time in decades, transit is the most popular way for people to get to work in San Francisco.
- » The latest commuting data available for downtown workers is the 2010 American Community Survey. It shows that downtown workers are even less likely to drive alone to work than workers citywide, and over half take transit.
- » As of the 2010 ACS, just 27.4% of downtown workers drive alone to their jobs, meaning over 70% commute via a mode other than single-occupancy vehicle.

TABLE 2.2A

Journey to Work (People who work anywhere in San Francisco)

Mode of Travel to Work	2000		2009		2013	
	#	%	#	%	#	%
Drove alone	220,190	37.5%	216,936	36.6%	217,721	35.3%
Carpool	79,160	13.5%	64,213	10.8%	62,652	10.2%
Public Transportation	208,675	35.5%	216,947	36.6%	231,196	37.5%
Bike	8,245	1.4%	11,256	1.9%	15,656	2.5%
Walked	39,350	6.7%	42,329	7.1%	44,981	7.3%
Taxi, Motorcycle and Other means	12,305	2.1%	12,568	2.1%	13,136	2.1%
Worked at Home	19,375	3.3%	28,902	4.9%	31,428	5.1%
Total Workers	587,300	100.0%	593,151	100.0%	616,770	100.0%

Source: US Census, 2000 Census Transportation Planning Package, 2009 and 2013 ACS

TABLE 2.2B

Journey to Work (People who work in Downtown San Francisco)

Mode of Travel to Work	2010	
	#	%
Drove alone	80,730	27.4%
Carpool	27,907	9.5%
Public Transportation	151,698	51.4%
Bike	5,170	1.8%
Walked	19,525	6.6%
Taxi, Motorcycle and Other means	7,270	2.5%
Worked at Home	2,570	0.9%
Total Workers	294,870	100.0%

Source: US Census, 2000 Census Transportation Planning Package, 2010 ACS

Journey to Work (Residents)

- » Regardless of where they work, driving alone to work has declined over the past decade among all San Francisco residents. Increasing numbers of San Franciscans take transit (32.6%), walk (10.1%) or bike (3.5%) to their jobs, or work at home (7%).
- » Census data shows residents of downtown have starkly different commuting patterns than the city and region as a whole. Just 21% of workers residing in the downtown census tracts drove alone to work.
- » The most popular ways for downtown residents to get to work was via transit (34.2%) and walking (28.7%). However, both modes declined slightly from 2009.

TABLE 2.2C

Journey to Work (San Francisco residents)

Mode of Travel to Work	2000		2009		2013	
	#	%	#	%	#	%
Drove alone	169,510	40.5%	167,871	38.9%	165,631	37.0%
Carpool	45,150	10.8%	34,041	7.9%	33,588	7.5%
Public Transportation	128,755	30.8%	140,052	32.4%	145,863	32.6%
Bike	8,300	2.0%	11,367	2.6%	15,631	3.5%
Walked	39,190	9.4%	41,547	9.6%	45,083	10.1%
Taxi, Motorcycle and Other means	8,260	2.0%	8,120	1.9%	10,019	2.2%
Worked at Home	19,375	4.6%	28,902	6.7%	31,428	7.0%
Total Workers	418,555	100.0%	431,900	100.0%	447,243	100.0%

Source: US Census, 2000 Census Transportation Planning Package, 2009 and 2013 ACS

TABLE 2.2D

Journey to Work (Downtown San Francisco residents)

Mode of Travel to Work	2009		2013	
	#	%	#	%
Drove alone	4,880	18.0%	6,441	20.9%
Carpool	688	2.5%	1,175	3.8%
Public Transportation	9,845	36.3%	10,530	34.2%
Bike	870	3.2%	1,241	4.0%
Walked	8,050	29.7%	8,825	28.7%
Taxi, Motorcycle and Other means	518	1.9%	641	2.1%
Worked at Home	2,310	8.5%	1,947	6.3%
Total Workers	27,150	100.0%	30,800	100.0%

Source: US Census, 2009 and 2013 ACS

Muni Ridership

- » In 2014, Muni buses and light rail vehicles carried almost 646,000 passengers on an average weekday.
- » Boardings on lines serving downtown, during the peak period (between 7-9 AM and 4-6 PM) totaled almost 160,000, representing 24.7% of total systemwide ridership.

Regional Transit Ridership

- » BART ridership has grown 12% system wide since 2008, and the system now carries almost 400,000 riders on an average weekday.
- » Downtown San Francisco stations account for roughly one-third of total BART ridership. However, two downtown stations - Embarcadero and Montgomery - have seen ridership increase at a significantly faster rate than the system as a whole.
- » Caltrain has seen even stronger ridership growth over the 2008-2014 period and now carries over 58,000 riders per day. Again, ridership at the downtown 4th and King Station increased at a faster rate (57%) than the system overall (49%).



Credit: torbakthopper, "after the music gig : muni train, duboce park, san francisco (2012)" October 6, 2012 via Flickr, Creative Commons Attribution

TABLE 2.3A
Muni Ridership, 2008–2014

Area	2008	2009	2010	2011	2012	2013	2014	Net Change*	
								13-14	08-14
San Francisco	657,364	681,865	654,428	649,848	679,664	682,583	645,915	n/a	n/a
On Lines Serving Downtown during the Peak Period(7-9 AM)	n/a	n/a	n/a	179,961	185,671	192,764	159,718	n/a	n/a
	n/a	n/a	n/a	27.7%	27.3%	28.2%	24.7%	n/a	n/a

Source: SFMTA, Planning Department.

* In 2014 the method for counting ridership, both systemwide and into and out of downtown, was changed. 2014 figures are thus not directly comparable to previous years.

TABLE 2.3B
BART Ridership, 2008–2014

Station	2008	2009	2010	2011	2012	2013	2014	Net Change	
								13-14	08-14
Downtown Stations	118,776	116,736	109,580	112,572	119,356	128,862	132,542	2.9%	11.6%
Embarcadero	36,094	35,486	34,310	35,603	37,700	41,059	42,546	3.6%	17.9%
Montgomery Street	34,472	34,098	32,163	33,711	36,517	39,167	40,864	4.3%	18.5%
Powell Street	27,897	27,064	24,676	25,139	26,400	28,295	28,322	0.1%	1.5%
Civic Center	20,313	20,088	18,432	18,119	18,739	20,342	20,810	2.3%	2.4%
Total	357,775	356,712	334,984	345,256	366,565	392,293	399,145	1.7%	11.6%
% Downtown Stations	33.2%	32.7%	32.7%	32.6%	32.6%	32.8%	33.2%	0.4 pts	0 pts

Source: BART

TABLE 2.3C
Caltrain Ridership, 2008–2014

Station	2008	2009	2010	2011	2012	2013	2014	Net Change	
								2013-14	2008-14
SF 4th and King	8,646	8,673	8,897	9,670	10,786	12,160	13,571	11.6%	57.0%
Total	39,122	36,778	37,779	42,354	47,060	52,611	58,245	10.7%	48.9%
% Downtown Station	22.1%	23.6%	23.6%	22.8%	22.9%	23.1%	23.3%	0.2 pts	1.2 pts

Source: Caltrain

TABLE 2.3D
AC Transit Ridership, 2008–2014

Station	2008	2009	2010	2011	2012	2013	2014	Net Change	
								2013-14	2008-14
Transbay Lines	n/a	n/a	n/a	n/a	11,545	13,897	13,233	-4.8%	n/a
Total	n/a	n/a	n/a	n/a	178,042	192,553	196,778	2.2%	n/a
% Downtown Station	n/a	n/a	n/a	n/a	6.5%	7.2%	6.7%	-0.5 pts	n/a

Source: AC Transit

Vehicle Occupancy

- » Vehicle occupancy in San Francisco and region-wide, has consistently declined over the past several decades. It currently falls far short of the Plan's goal of 1.66 persons per vehicle.
- » However, San Francisco residents and workers are more likely to carpool to work than the average commuter in the region, leading to higher vehicle occupancy rates (1.32 for workers and 1.21 for residents) than the regionwide rate of 1.19.

Parking

- » Over 1,400 net new parking spaces have been approved in the downtown C-3 districts from 2008 to 2013.
- » With the rollout of the department's Permit and Project Tracking System (PPTS), more accurate accounting of parking spaces included in new downtown development should become possible in the coming years.

TABLE 2.4
Vehicle Occupancy, 2009–2013

Area	2009		2013	
	Workers	Residents	Workers	Residents
San Francisco	1.33	1.21	1.32	1.21
Downtown Census Tracts	NA	1.08	NA	1.11
Bay Area	1.20	1.20	1.19	1.19

Source: US Census, ACS 2009 and 2013

TABLE 2.5
Net Parking Change in Downtown San Francisco, 2008–2014

Downtown C-3	2008	2009	2010	2011	2012	2013	2014
Parking spaces approved	250	-80	347	282	0	605	n/a

Source: Planning Department

Open Space, POPOS and Public Art

Privately-owned public open spaces (POPOS) are publicly accessible spaces in forms of plazas, terraces, atriums, and small parks that are provided and maintained by private developers. In San Francisco, POPOS are mostly in the Downtown office district. Prior to 1985, developers provided POPOS under three general circumstances: voluntarily, in exchange for a density bonus, or as a condition of approval. The *Downtown Plan* created the first requirements for developers to provide publicly accessible open space as a part of projects in C-3 Districts. The goal was to provide quality open space in sufficient quantity and variety to meet the needs of downtown workers, residents and visitors. Since then, project sponsors may provide POPOS instead of their required open spaces, and locate them in other districts such as Eastern Neighborhoods (Section 135 of the Planning Code).

The public art requirement created by the *Downtown Plan* is commonly known as the “1% for Art” program. Its purpose is to ensure that the public has access to a variety of high-quality art. This requirement, governed by Section 429 of the Planning Code, provides that construction of a new building or addition of 25,000 square feet or more within the downtown C-3 district triggers a requirement to provide public art that equals at least 1% of the total construction cost. After more than 25 years since the adoption of the *Downtown Plan*, development has created an extensive outdoor gallery that enriches the Downtown environment for workers and tourists alike.

Though no new POPOS were opened in 2014, downtown development has added 32 POPOS since 1985, approximately 60% of which include public art. The public art requirement has produced 39 pieces of art related to 31 development projects. With the economic recovery gathering strength, more POPOS and public art will be added in the future.

TABLE 2.6
POPOS and Public Art

Location	< 1985	1985-2014	Total
In C-3 District	50	32	82
with Art	2	21	23
Outside C-3 District	2	2	4
with Art	1	1	2
TOTAL	52	34	86

Source: Planning Department

Looking Ahead: Housing

The Department's quarterly Pipeline Report tracks development projects as they move through the entitlement process, and provides an estimate of where and when commercial and residential projects will be constructed in the city.

The latest pipeline information available (2014 Q4) counts 50,491 units in the pipeline citywide. It would take almost 34 years to complete all the housing units in the current pipeline, if housing were produced at the rate of 1,500 units/year as recommended by the *Downtown Plan*.

Housing Pipeline

- » There are 5,366 units of housing in the pipeline for the Downtown C-3 districts, and a further 2,309 in the adjacent Downtown Residential (DTR) districts, for a total of 7,675 units in the greater downtown area. Together, the C-3 and DTR districts contain 15.2% of the 50,491 units in the citywide residential pipeline.
- » Almost half (48.9% - 24,714 units) of the housing planned for the city are located in Parkmerced, Treasure Island and Hunters Point-Candlestick Point, large master planned developments which will be built in phases.

TABLE 2.7
Housing Pipeline

Location	Total	
	Units	% of Citywide
Downtown C-3	5,366	10.6%
C-3-O(SD)	1,434	
C-3-O	24	
C-3-R	552	
C-3-S	380	
C-3-G	2,976	
DTR Districts	2,309	4.6%
PM, HPCP and TI*	24,714	48.9%
Rest of City	18,102	35.9%
TOTAL	50,491	100.0%

*Parkmerced, Hunters Point-Candlestick Point and Treasure Island
Source: Planning Department

Household and Population Projections

The Association of Bay Area Governments (ABAG) prepares projections of housing and employment throughout the nine county Bay Area, analyzing local zoning capacity and development trends to predict where within the region future residents and jobs will go. Projections are released at the Priority Development Area (PDA) level of geography (refer to map 1).

- » ABAG projects the number of households in San Francisco to grow to almost 469,460 by 2040, a 25% increase. San Francisco is projected to grow at a faster rate than the Bay Area as a whole.
- » The two PDAs covering downtown San Francisco (Downtown-Van Ness-Geary and Transbay Terminal) are projected to grow by 31,860 households (31%) by 2040.

TABLE 2.8
Household Projections

Area	2010	2040	2010–2040	
			#	%
Downtown	102,010	133,870	31,860	31.2%
Downtown-Van Ness-Geary	101,520	128,660	27,140	26.7%
Transbay Terminal	490	5,210	4,720	963.3%
San Francisco	376,940	469,430	92,490	24.5%
Bay Area	2,785,950	3,445,950	660,000	23.7%

Source: Association of Bay Area Governments

PART 3:

TAXES AND FEES

Jobs Housing Linkage Fee

Prompted by the *Downtown Plan*, the City determined that employment growth associated with large office development projects would attract new residents and therefore increase demand for housing. In response, the Office Affordable Housing Production Program (OAHPP) was established in 1985 to require large office developments to contribute to a fund to increase the amount of affordable housing. In 2001, the OAHPP was renamed the Jobs-Housing Linkage Program (JHLP) and revised to require all commercial projects with a net addition of 25,000 gross square feet or more to contribute to the fund.

- » In FY 2013-2014, \$11,974,893 in Jobs Housing Linkage Fees were collected, a 111% increase over the previous fiscal year.
- » Between FY 2007-2008 and FY 2013-2014, the City collected over \$20 million in Jobs Housing Linkage fees.

Transit Impact Development Fee (TIDF)

In 1981, as a precursor to the *Downtown Plan* and responding to a substantial increase in downtown office development, San Francisco enacted a fee to recover a portion of additional transit operating and capital costs incurred by this growth. Initially, all new office developments were required to pay \$5 per square foot of office space to cover the added transit service to downtown office buildings. In 2004, the Municipal Transportation Agency (SFMTA) modified this fee to include all proposed non-residential developments in San Francisco.

- » San Francisco has collected about \$12.5 million in TIDF revenues to date for fiscal year 2013-14.
- » Since FY2008, \$28.4 million in TIDF fees have been collected.

TABLE 3.1

Jobs Housing Linkage Fees Collected, FY2008–2014

Fiscal Year	Number of Projects	Amount Collected
2008	3	\$1,819,887
2009	0	\$-
2010	1	\$(8,775)
2011	1	\$15,878
2012	5	\$567,229
2013	11	\$5,678,329
2014	16	\$11,974,893
TOTAL	37	\$20,047,441

Source: San Francisco Controller's Office FY2012-13 and 2013-14 Biennial Development Impact Fee Report

TABLE 3.2

Transit Impact Development Fees Collected, FY2008–2014

Fiscal Year	Ordinance	Amount Collected
2008	2007 Ordinance	\$1,006,091
2009	2007 Ordinance	\$5,013,157
2010	2007 Ordinance	\$2,029,591
2011	2010 Ordinance	\$1,131,508
2012	2010 Ordinance	\$1,776,648
2013	2010/2013 Ordinance	\$4,832,838
2014	2013/2014 Ordinance	\$12,572,845
Total		\$28,362,678

Source: San Francisco Controller's Office FY2012-13 and 2013-14 Biennial Development Impact Fee Report

Downtown Park Fee

The *Downtown Plan* recognized an open space deficiency in downtown and the adjacent South of Market area. To meet this need, the Plan calls for the preservation and enhancement of existing open spaces and the creation of additional open space through the POPOS program. New office developments are required to contribute \$2 per square foot of building space to the Downtown Park Special Fund. These funds are designated for the acquisition and development of parks and open spaces within the C-3 Districts.

- » In FY 2013-2014, \$1,152,910 in Downtown Park Fees were collected, more than a threefold increase over the previous fiscal year.
- » Between FY 2007-2008 and FY 2013-2014, the City collected over \$12.8 million in Downtown Park fees.

Childcare Fee

To meet childcare demands of expected employment growth, the *Downtown Plan* required new office and hotel development over 50,000 square feet to contribute to childcare needs. A project may provide childcare on-site or within one mile of the development site. Alternatively, a project sponsor may pay a non-profit to provide childcare off-site or contribute \$1 per gross square foot of office or hotel space to the Childcare Capital Fund.

- » In FY 2013-2014, \$1,012,732 in Childcare Fees were collected from 12 projects, almost double what was collected in the previous fiscal year.
- » Between FY 2007-2008 and FY 2013-2014, the City collected over \$3.4 million in Childcare fees.

TABLE 3.3

Downtown Park Fees Collected, FY2008–2014

Fiscal Year	Number of Projects	Amount Collected
2008	0	\$0
2009	1	\$1,096,546
2010	2	\$346,922
2011	0	\$0
2012	0	\$0
2013	3	\$305,890
2014	4	\$1,152,910
TOTAL	10	\$12,801,626

Source: San Francisco Controller's Office FY2012-13 and 2013-14 Biennial Development Impact Fee Report

TABLE 3.4

Childcare Fees Collected, FY2008–2014

Fiscal Year	Number of Projects	Amount Collected
2008	0	\$803,958
2009	1	\$548,273
2010	1	\$153,500
2011	2	\$377,427
2012	0	\$0
2013	6	\$551,982
2014	12	\$1,012,732
TOTAL	22	\$3,447,872

Source: San Francisco Controller's Office FY2012-13 and 2013-14 Biennial Development Impact Fee Report

Business Tax

In November 2012, San Francisco voters approved the Gross Receipts Tax and Business Registration Fees Ordinance (Proposition E), which introduced major changes to the way businesses are taxed in the city. Starting January 1, 2014, the City now collects a Gross Receipts tax, and will phase out the existing Payroll tax over several years. In this fiscal year, total business tax revenue is comprised of business payroll tax, registration tax, gross receipts tax, and administrative office tax.

Business payroll taxes assess the payroll expense of persons and associations engaging in business in San Francisco and continue to represent the vast majority of business taxes collected. This tax imposes a fee on all businesses that employ or contract with one or more employees to perform work or render services within the city. Business registration tax is an annual fee assessed for general revenue purposes on all business in the city.

Gross receipts and Administrative office taxes are based on a business's gross receipts from business done in San Francisco, rather than on a business's payroll expense.

- » Total business tax revenue in FY 2013-14 is estimated at \$612.4 million, up 12% from \$534.7 million in FY 2012-13.
- » In FY 2013-14, the Controller's Office collected \$470.1 million in payroll taxes, up 0.6% from \$467.4 million in FY 2012-13 despite .
- » \$41.8 million in Business Registration fees were collected in the past year, up 23.3% from the previous year. The formula for calculating this fee was amended as part of Prop E, resulting in significantly higher collections in FY 13-14. rom \$10 million in FY 2012-13.
- » \$74.6 million and \$25.9 million were collected in gross receipts and administrative office taxes, respectively, in FY 2013-14

TABLE 3.5
Business Taxes Collected, 2008–2014

Revenue Source	2008	2009	2010	2011	2012	2013	2014	Net Change	
								13-14	08-14
Payroll	\$378.7	\$345.6	\$426.7	\$426.7	\$469.7	\$467.4	\$470.1	0.6%	24.2%
Registration	\$8.7	\$7.9	\$8.1	\$8.6	\$10.0	\$33.9	\$41.8	23.3%	382.7%
Gross Receipts	-	-	-	-	-	\$20.7	\$74.6	260.4%	n/a
Admin Office	-	-	-	-	-	\$12.7	\$25.9	103.9%	n/a
Total	\$387.3	\$353.5	\$434.8	\$435.3	\$479.7	\$534.7	\$612.4	11.5%	55.3%

Source: San Francisco Controller's Office FY2014-15 Nine-month Budget Status Report

Property Tax

- » Property taxes are the city's largest single source of tax revenue. In FY 2013-14, \$1.25 billion in property taxes were collected, a 6.3% increase from the previous year and a 33% increase since 2008.
- » \$304 million in Property Transfer Tax was collected in FY13-14.

Sales Tax

Sales tax revenues fluctuate with economic conditions and reflect consumer confidence and spending. Of the 8.75% sales tax rate, San Francisco receives 1%, with the rest going to the State and other districts. A portion of this revenue is deposited in the City's general fund with the balance allocated by law for specific programs and services.

- » FY 2013-14 sales tax collections increased 6.7% to \$142.7 million from \$133.7 million in FY 2012-13.
- » Sales tax collections have grown 28% since 2008.

TABLE 3.6
Property Taxes Collected, 2008–2014

Revenue Source	2008	2009	2010	2011	2012	2013	2014	Net Change	
								13-14	08-14
Property Tax	\$1,021.3	\$1,060.3	\$1,061.9	\$1,059.2	\$1,114.1	\$1,177.4	\$1,252.0	6.3%	32.7%
Transfer Tax	\$49.0	\$83.7	\$135.2	\$233.6	\$232.7	\$261.9	\$304.0	16.1%	252.6%
Total	\$1,070.3	\$1,144.0	\$1,197.1	\$1,292.8	\$1,346.8	\$1,439.3	\$1,556.0	6.9%	39.8%

Source: San Francisco Controller's Office FY2014-15 Nine-month Budget Status Report

TABLE 3.7
Sales Taxes Collected, 2008–2014

Revenue Source	2008	2009	2010	2011	2012	2013	2014	Net Change	
								13-14	08-14
Sales Tax	\$101.7	\$96.6	\$106.3	\$117.1	\$122.3	\$133.7	\$142.7	6.7%	28.1%

Source: San Francisco Controller's Office FY2014-15 Nine-month Budget Status Report

Hotel Tax

- » Hotel tax collections have risen significantly since 2008. \$341.6 million in hotel tax was collected in FY2013-14.

TABLE 3.8
Hotel Taxes Collected, 2008–2014

Revenue Source	2008	2009	2010	2011	2012	2013	2014	Net Change	
								13-14	08-14
Hotel Tax	\$161.7	\$135.5	\$158.9	\$188.7	\$182.4	\$310.1	\$341.6	10.2%	106.4%

Source: San Francisco Controller's Office FY2014-15 Nine-month Budget Status Report

PART 4:

HISTORIC PRESERVATION

Historic Preservation

The *Downtown Plan* was developed to anticipate significant growth and development, but that this growth must be managed to enhance – and not detract from – the city’s historic resources. The Plan identified significant buildings that must be retained as well as buildings regarded as contributory and encouraged for retention.

Individual buildings were also classified into categories according to their age, architectural design, and relationship to the environment. Categories I and II are considered significant buildings. They are at least 40 years old, are considered “Buildings of Individual Importance,” and are rated excellent in architectural design or very good in both architectural design and relationship to the environment. Categories III and IV are defined as “Contributory Buildings” and are rated very good in architectural design or in relationship to the environment. Buildings in these categories may not be demolished unless the property retains no substantial remaining market value or reasonable use, or presents an imminent safety hazard. If major alterations are proposed, the Historic Preservation Commission considers them using standards that respect the architectural character of the building. All other buildings not rated in the C-3 District are identified as Category V.

Conservation districts were created as part of the Plan, where clusters of rated buildings were determined to have collective significance. New construction within a district is evaluated for compatibility of scale, composition and massing, materials and colors, detailing and ornamentation. The Transbay Terminal special use district (SUD) includes an area south of Market Street previously designated as the New Montgomery-Mission-Second Street Conservation District. As an incentive to save historic buildings in the SUD, the Plan enabled owners of buildings designated for preservation to sell unused development rights. The intent is to maintain development potential in the C-3 while retaining historic buildings. Revenues from the sale of development rights can

then be used to preserve and improve historic structures. In December 2010, the Transfer of Development Rights ordinance was amended by the Board of Supervisors to allow eligible owners of historic buildings to sell development rights to any C-3 zoned lot.

Historic Preservation Commission

In 2009 the Historic Preservation Commission replaced the Landmarks Preservation Advisory Board (Landmarks Board), which was a nine-member body, appointed by the Mayor that served as an advisory board to the Planning Commission and the Planning Department. The Landmarks Board was established in 1967 with the adoption of Article 10 of the Planning Code and dissolved in 2008 with the creation of the Historic Preservation Commission through a voter-approved amendment to the City’s Charter.

The Historic Preservation Commission is a seven-member body appointed by the Mayor and approved by the Board of Supervisors that makes recommendations directly to the Board of Supervisors, on the designation of Article 10 landmark buildings, districts, and Article 11, significant and contributory buildings and districts. Six members are required to have professional backgrounds in planning, architecture, historical conservation, and related fields and one member is “at-large.”

The Historic Preservation Commission has the authority to review and approve any work associated with permit applications to designated sites or located within designated districts. This work is entitled through a Certificate of Appropriateness for an Article 10 property and a Permit to Alter for an Article 11 property. The Historic Preservation Commission also provides review and comment on projects affecting historic resources subject to environmental review under the California Environmental Quality Act (CEQA), and projects subject to review under Section 106 of the National Historic Preservation Act.

Transit Center District Plan: Preservation Review

A multi-year study was conducted of the area south of Market Street for the purposes of drafting a long-range downtown Transit Center District Plan. The research and analysis for the plan included an updated historic resources survey and comprehensive Article 11 reclassification of the area's existing building inventory. Since the time of the last survey in 1985, a number of buildings had reached age eligibility for historic consideration or new information became available to assist staff in assigning historic Article 11 classifications to all the affected downtown properties.

The result of this effort was the:

- » Expansion of the existing Article 11 New Montgomery-Second Street Conservation District boundaries further west towards 3rd Street, extending Preservation review to approximately 26 additional parcels, and its renaming as the New Montgomery-Mission-Second Street Conservation District.

- » The inclusion of three buildings to the Historic Preservation Commission's Landmark Designation Work Program, the Philips & Van Orden Building (234 First Street), the Bourdette Building (90-92 Second Street) and the Marine Firemen's Union Headquarters (240 Second Street).
- » Article 11 reclassification of 26 buildings within the Plan Area based on historic documentation initiated by the Historic Preservation Commission and approved by the Board of Supervisors
- » Inclusion of Historic Preservation Policies and Objectives in the final Transit Center District Plan to incentivize and support the maintenance, rehabilitation, and adaptive re-use of historic resources based on widely accepted best practices.



MAP 3
New Montgomery –
Mission – Second Street
Conservation District

Downtown Rehabilitation Projects

Between 2008 and 2014 numerous rehabilitation projects have been undertaken downtown, ranging from pedestrian-level storefront upgrades to early-20th century skyscraper remodels, a small sampling of which are included in this report.



Credit: Handel Architects LLP

Aronson Building

86 Third Street

Original Construction:

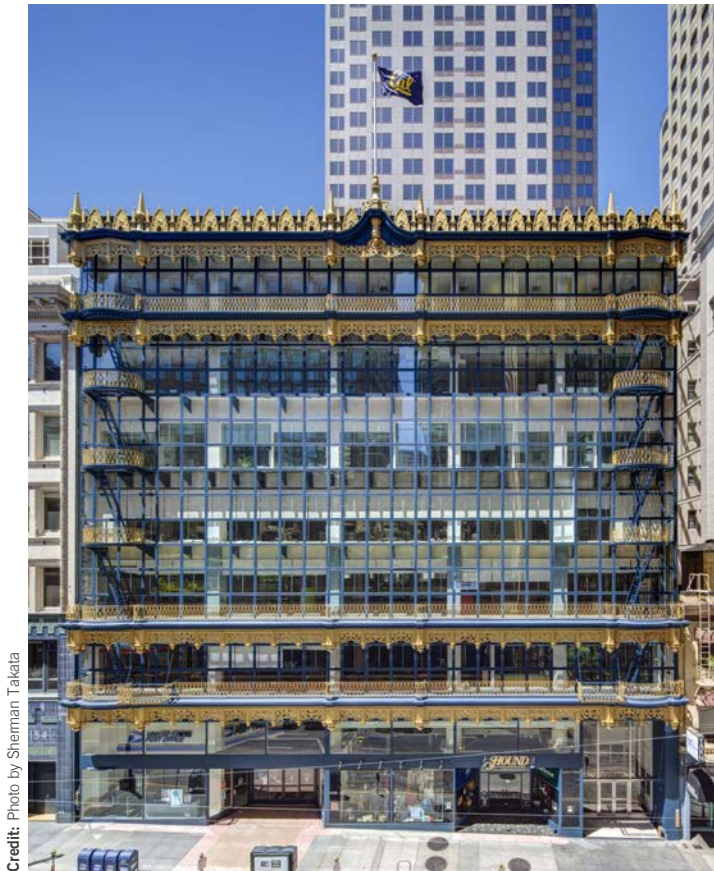
1903; Hemenway & Miller, architects

Historic Designation:

Category I and within the New Montgomery-Mission-Second Street Conservation District

Scope of Work:

Rehabilitation of the historic brick and terra cotta building envelope as part of the adjacent new construction project at 706 Mission Street. Architectural details such as surviving cast iron pilasters at the storefronts, Romanesque terra cotta ornament at the upper two floors, and a decorative sheet metal cornice will be preserved in the exterior restoration work. Once completed, the restored ten-story Aronson Building will feature approximately 10,000 square feet of ground floor retail and restaurant space, seven floors of residential units, and two floors dedicated to the Mexican Museum.



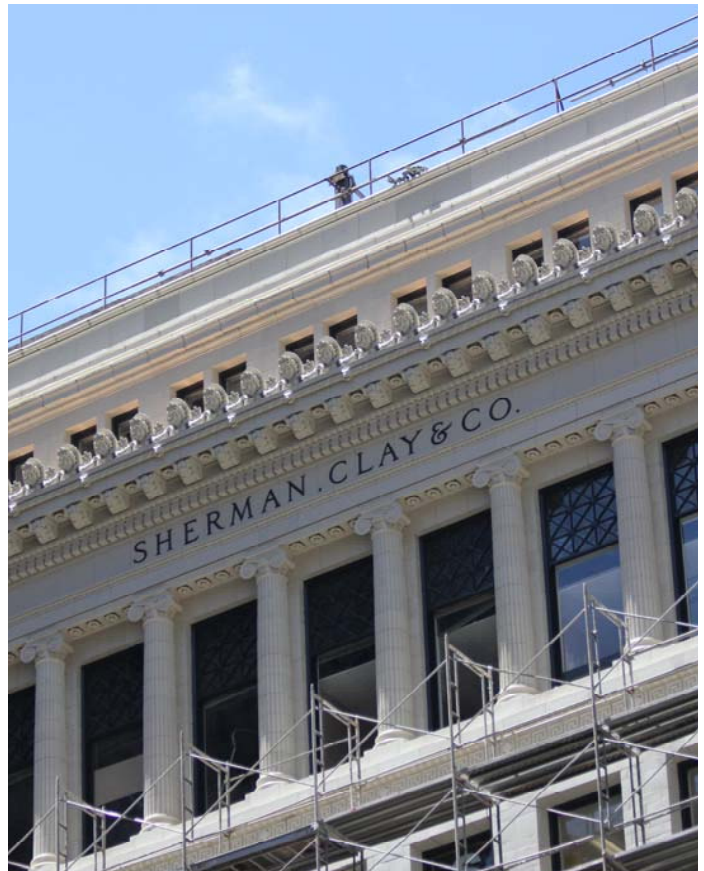
Hallidie Building

130 Sutter Street

Original Construction:
1918, Willis Polk, architect

Historic Designation:
Category I and San Francisco Landmark #37

Scope of Work:
Façade restoration of what is thought to be one of the earliest glass curtain walls in American architecture. By 2010, the building's groundbreaking glass-paneled façade showed signs of cumulative deterioration that prompted media stories about its "crumbling" condition. Over the course of two-years, the curtain wall system that supports the crystalline façade and distinctive iron ornament – painted blue and gold to reflect its University of California, Berkeley ownership – were meticulously returned to their original luster. Ground floor commercial space is topped by 6-stories of offices including the local chapter of the American Institute of Architects.



Sherman Clay & Co. Building

211 Sutter Street

Original Construction:
1907, George Applegarth, architect

Historic Designation:
Category I and within the Kearny-Market-Mason Sutter Conservation District

Scope of Work:
Reconstruction of the deteriorated terra cotta cornice using a lightweight substitute material. Located at the intersection of Kearny and Sutter streets, the 10-story building at the southwest corner serves as a fulcrum point in a contiguous row of buff-colored, marble and terra cotta commercial buildings along the adjacent block faces. The oversized cornice features Ionic order pilasters and figural busts. The deteriorating support steel was replaced with a new anchoring system and the heavier terra cotta was cast to create molds for replica panels made of glass fiber reinforced concrete (GFRC) that were finished to match the speckled glaze of the historic material.



Credit: aasarchitecture.com

Pacific Telephone & Telegraph Building

140 New Montgomery Street

Original Construction:

1925; Miller and Pflueger, architects

Historic Designation:

Category I and within the New Montgomery-Mission-Second Conservation District

Scope of Work:

Adaptive reuse of the Art Deco style former headquarters of the Pacific Telephone & Telegraph Building for modern office space with ground floor commercial use. After a period of vacancy, the 1920s high rise was purchased for redevelopment in 2007. Architect Timothy Pflueger's original Chinoiserie lobby design was retained, as were original steel sash windows at the lower levels of the building, where two restaurant tenants

occupy the 8,700-square foot space. The terra cotta cladding, glazed to resemble granite, was preserved and sealed with new mortar joints. Over 1,300 replacement windows were installed on the upper floors of the tower, which is being leased as flexible-plan office space. The restored building, with its exterior lighting scheme, serves as a visual landmark on the city skyline.

Activity in Historically Rated Buildings

The two primary historic preservation related entitlements sought by historically rated properties are the Certificate of Appropriateness (C of A) and Permit to Alter (PTA). In recent years, a streamlined process has been introduced, by which simpler projects may seek an Administrative C of A or Minor PTA, which can be carried out administratively by department staff.

- » Between 2008 and 2014, the Planning Department has issued over 350 permits in historically rated downtown buildings.

TABLE 4.1

**Major and Minor Permits to Alter
Article 11 Buildings, 2008–2014**

Article 11 Category	Permits to Alter
Category I	166
Category II	32
Category III	1
Category IV	81
Category V	27
TOTAL	307

Note: Includes cases opened between 2008 and 2014.
Entitlements issued prior to the HPC's creation in 2009 are not counted.

TABLE 4.3

TDR Summary, 2008–2014

Zoning District	Certified	Used	Remaining	% Used	Used in District
C-3-G	1,485,327	862,853	622,474	58.1%	186,846
C-3-O	3,078,306	1,450,110	1,628,196	47.1%	1,561,130
C-3-O (SD)	177,064	124,514	52,550	70.3%	956,181
C-3-R	492,531	276,336	216,195	56.1%	30,786
C-3-S	43,174	21,130	22,044	48.9%	253,195
P	491,353	253,195	238,158	51.5%	-
Total	5,767,755	2,988,138	2,779,617	51.8%	2,988,138
% of potential 8 million Sq Ft.	72.1%				

Source: Planning Department

Transfer of Development Rights (TDR)

The Plan established a special use district around the Transbay Terminal to shift office construction to that area as a means of reducing further disruption to the financial center north of Market Street. As an incentive to save historic buildings and to shift office development to the planned area south of Market Street, the Plan enabled owners of buildings designated for preservation to sell development rights to developers in the special use district. In December 2010, the Transfer of Development Rights ordinance was amended by the Board of Supervisors to allow eligible owners of historic buildings to sell development rights to any C-3 zoned lot.

- » Over 5.7 million square feet of development rights have been certified under the downtown C-3 TDR program since its inception. This represents 72.1% of the total 8 million potential square feet enabled by the program.

TABLE 4.2

**Certificates of Appropriateness
Article 10 Buildings, 2008–2014**

	C of A
TOTAL	56

PART 5: THE FUTURE OF DOWNTOWN



The Future of Downtown

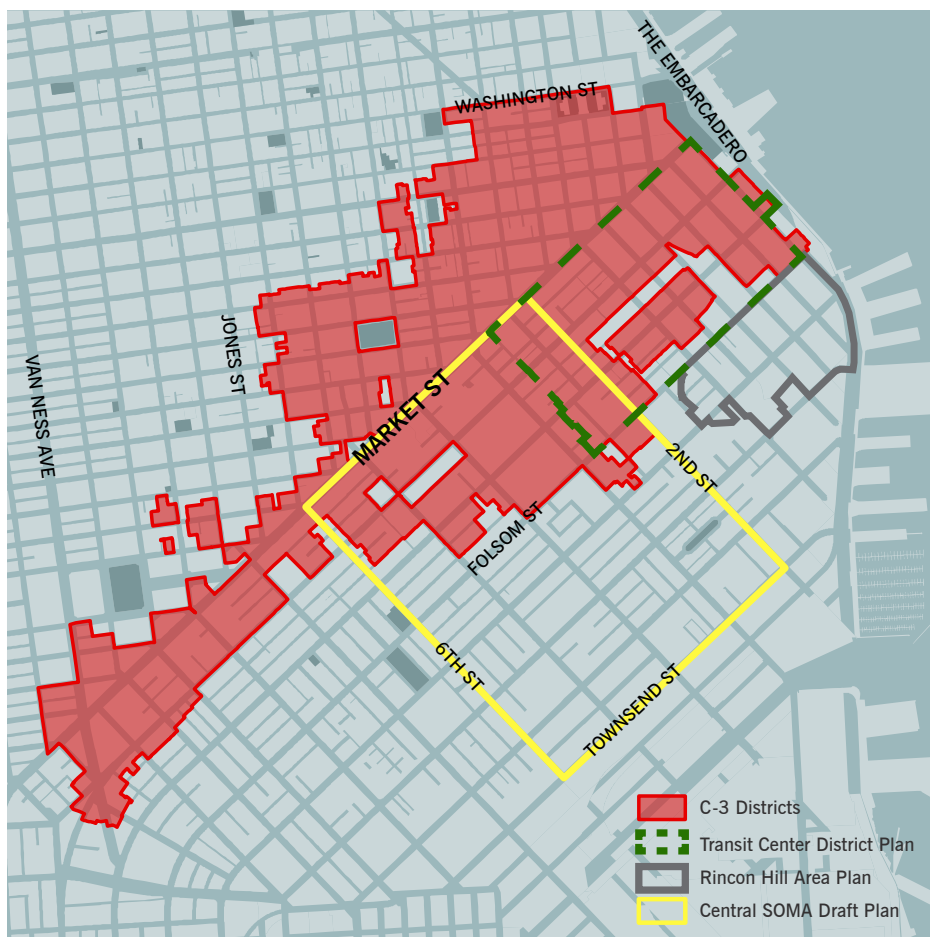
When the *Downtown Plan* was created in the early 1980s, it generated national headlines, with the New York Times calling it “one of the most complete prescriptions for growth any American downtown has been given.”¹ It aimed to grow San Francisco’s downtown as a major regional employment center, directing high-density, transit-oriented growth to the south of Market Street while preserving the Financial District’s many historic structures, and ensuring that new buildings added to, rather than detracted from, the downtown and city’s quality of life. Thirty years later, that prescription for a livable downtown has succeeded.

Since the Plan was passed, several area planning efforts have built on these broad goals to enable millions of square feet of office space surrounding the future Transbay Terminal (Transit Center District Plan) and thousands of residential units in a neighborhood adjacent to downtown (Rincon Hill). In addition, as the traditional downtown area approaches buildout, efforts are underway to focus additional employment growth around new transportation infrastructure currently under construction in Central SOMA.

¹ Goldberger, P. (1983, October 2). San Francisco Plans A Coherent Future. The New York Times. Retrieved from <http://www.nytimes.com>

MAP 4

C-3 Districts and Recent Planning Efforts



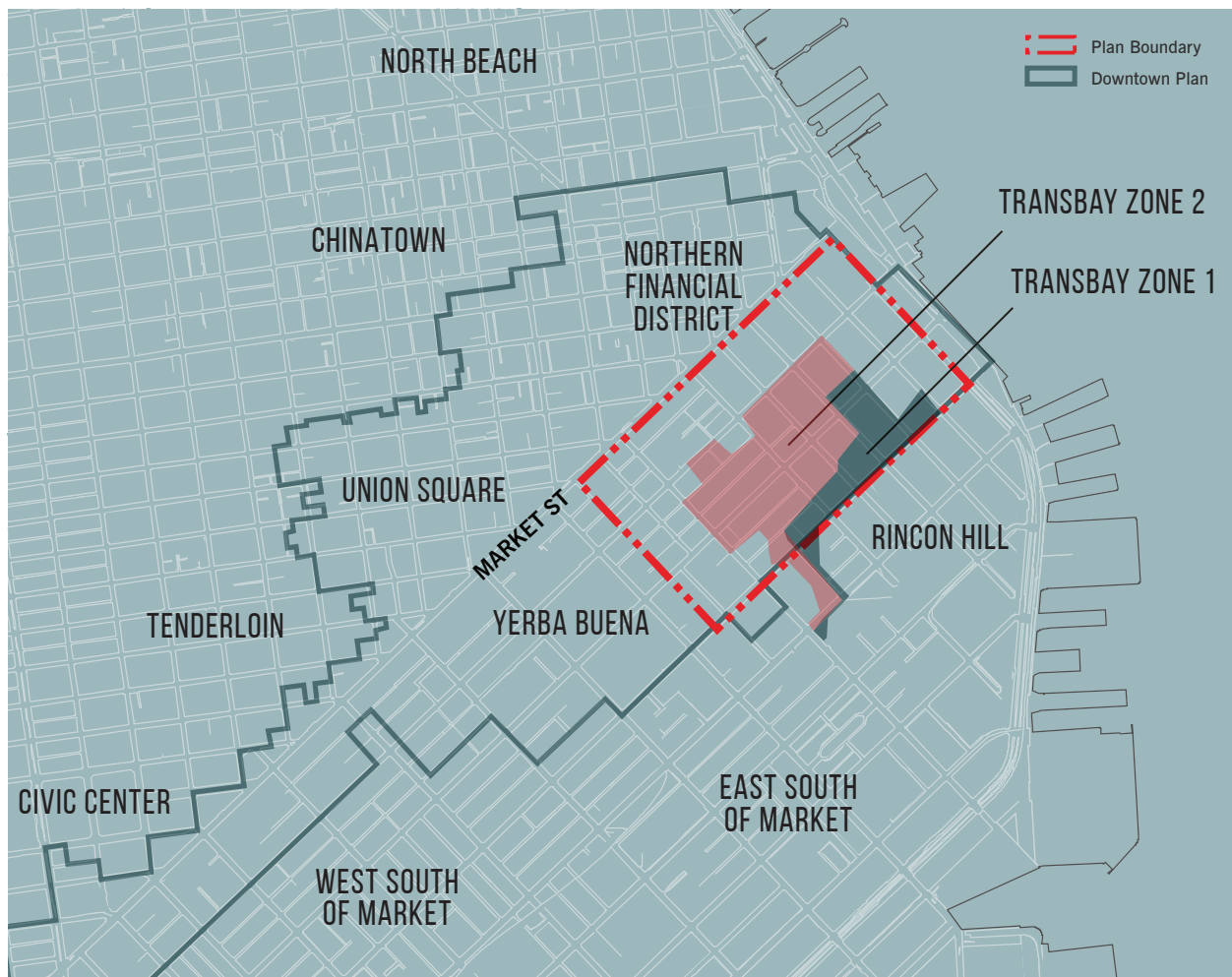
Transbay Terminal Area

The demolition of the Embarcadero freeway after the 1989 Loma Prieta earthquake left several publicly-owned parcels around the now-demolished Transbay Terminal bus station on First and Mission Streets. In order to coordinate development of those parcels, and fund the reconstruction of the Transbay Terminal into a major regional transit center with Caltrain and California High Speed Rail connections, the Transbay Redevelopment Project Area was created in 2005. The Planning Department then partnered with the San Francisco Redevelopment Agency (now Office of Community Investment and Infrastructure) and the Transbay Joint Powers Authority in developing the Transit Center District Plan (TCDP), adopted in 2012.

The Transit Center District Plan (TCDP) is the result of a five-year planning process, and builds on the *Downtown Plan's* policies and goals of focusing growth where transit access is greatest, while ensuring that new development contributes public amenities and helps to develop a first-class network of streets and open spaces within the Plan area. To that end, the TCDP established impact fees for open space and street improvements. As projects developed under the Plan's guidelines are built and the new Transbay Terminal nears completion, this part of downtown San Francisco will see significant changes in the skyline as well as on the ground.

MAP 5

Transbay Redevelopment Areas and Transit Center District Plan Area



Impact Fees

Impact Fee revenue may be expended towards projects recommended by the Planning Commission and approved by the Board of Supervisors. Open Space funds collected in the TCDP area are designated for designing, engineering, acquiring and developing or improving new and existing public open spaces and recreational facilities, and may be used citywide. Transportation and Street Improvement fees are to be used on new and enhanced transportation services and improvements to rights-of-way for all transportation modes, and must be used in the greater downtown.

TABLE 5.1A
Transit Center District Open Space Impact Fees Collected, FY2012–2014

Fiscal Year	Number of Projects	Amount Collected
2012	0	\$-
2013	0	\$-
2014	1	\$313,500
TOTAL	1	\$313,500

Source: San Francisco Controller's Office, FY2012-13 & FY2013-14 Biennial Development Impact Fee Report

TABLE 5.1B
Transit Center District Transportation and Street Improvement Impact Fees Collected, FY2012–2014

Fiscal Year	Number of Projects	Amount Collected
2012	0	\$-
2013	0	\$-
2014	1	\$46,208
TOTAL	1	\$46,208

Source: San Francisco Controller's Office, FY2012-13 & FY2013-14 Biennial Development Impact Fee Report

The Transbay Pipeline

The Planning Department counts 11 projects in the pipeline within the TCDP Area, consisting of over 4.8 million square feet of commercial space and over 2,500 future housing units. This total includes the 1.4 million square foot Salesforce Tower (formerly known as the Transbay Tower), anticipated for completion in 2018, which will be the tallest building in San Francisco

TABLE 5.1C
Transbay Pipeline

Number of Projects	11
Housing Units	2,516
Total Commercial	4,875,969
Office	3,927,819
Retail	338,150
Hotel	610,000

Source: Planning Department

Rincon Hill

The Rincon Hill Area Plan, adopted in 2005, seeks to transform Rincon Hill into a mixed-use downtown neighborhood with a significant housing presence, while providing a full range of services and amenities that support urban living. The Rincon Hill Plan aims to mitigate the impacts of this development by providing neighborhood open spaces, pedestrian, traffic-calming, and other streetscape improvements to be funded with a community infrastructure impact fee. Impacts from development on affordable housing, economic and community development, and community cohesion in the immediately surrounding area defined as South of Market Area (SoMa) are to be offset by the SoMa Community Stabilization Fee

Impact Fees

Community Infrastructure fees collected in the Rincon Hill Plan area must be used designing, engineering, acquiring and developing or improving new and existing public open spaces and streetscape improvements within the Plan Area or within 250 feet of it. SoMa Community Stabilization fees are to be used for affordable housing and community asset building in the greater South of Market area.

TABLE 5.2A
Rincon Hill Community Infrastructure Impact Fees Collected, FY2008–2014

Fiscal Year	Number of Projects	Amount Collected
2008	0	\$-
2009	1	\$2,750
2010	0	\$-
2011	1	\$589,626
2012	1	\$(17,174)
2013	3	\$5,908,512
2014	5	\$10,111,354
TOTAL	11	\$16,595,068

Source: San Francisco Controller's Office, FY2012-13 & FY2013-14 Biennial Development Impact Fee Report



Credit: Tom Coates, "View of SOMA" April 20, 2015 via Flickr, Creative Commons Attribution

Rincon Hill Housing Production & Pipeline

The Planning Department counts 4 projects in the pipeline within the Rincon Hill Area Plan, consisting of over 1,200 future housing units. These projects would result in a net loss of 58,900 square feet of existing commercial space in the neighborhood.

TABLE 5.2B
SoMa Community Stabilization Fees Collected,
FY2008–2014

Fiscal Year	Number of Projects	Amount Collected
2008	0	\$-
2009	2	\$67,324
2010	1	\$4,962,933
2011	1	\$2,807,128
2012	1	\$(81,761)
2013	1	\$185,874
2014	4	\$1,899,067
TOTAL	10	\$9,840,565

Source: San Francisco Controller's Office,
FY2012-13 & FY2013-14 Biennial Development Impact Fee Report

TABLE 5.2D
Rincon Hill Pipeline

Number of Projects	4
Housing Units	1,226
Total Commercial	-58,906
Office	-35,500
Retail	11,850
PDR	-35,256

Source: Planning Department

TABLE 5.2C
Housing Production, 2008–2014

Area	2008	2009	2010	2011	2012	2013	2014	13–14	08–14
Rincon Hill	621	413	8	0	0	326	395	21%	1,763
Citywide	3,019	3,366	1,082	348	794	2,330	3,454	48.2%	14,393
RH % of Citywide	18%	11%	1%	0%	0%	17%	11%		11%

Source: San Francisco Planning Department, Housing Inventories.

Central SOMA

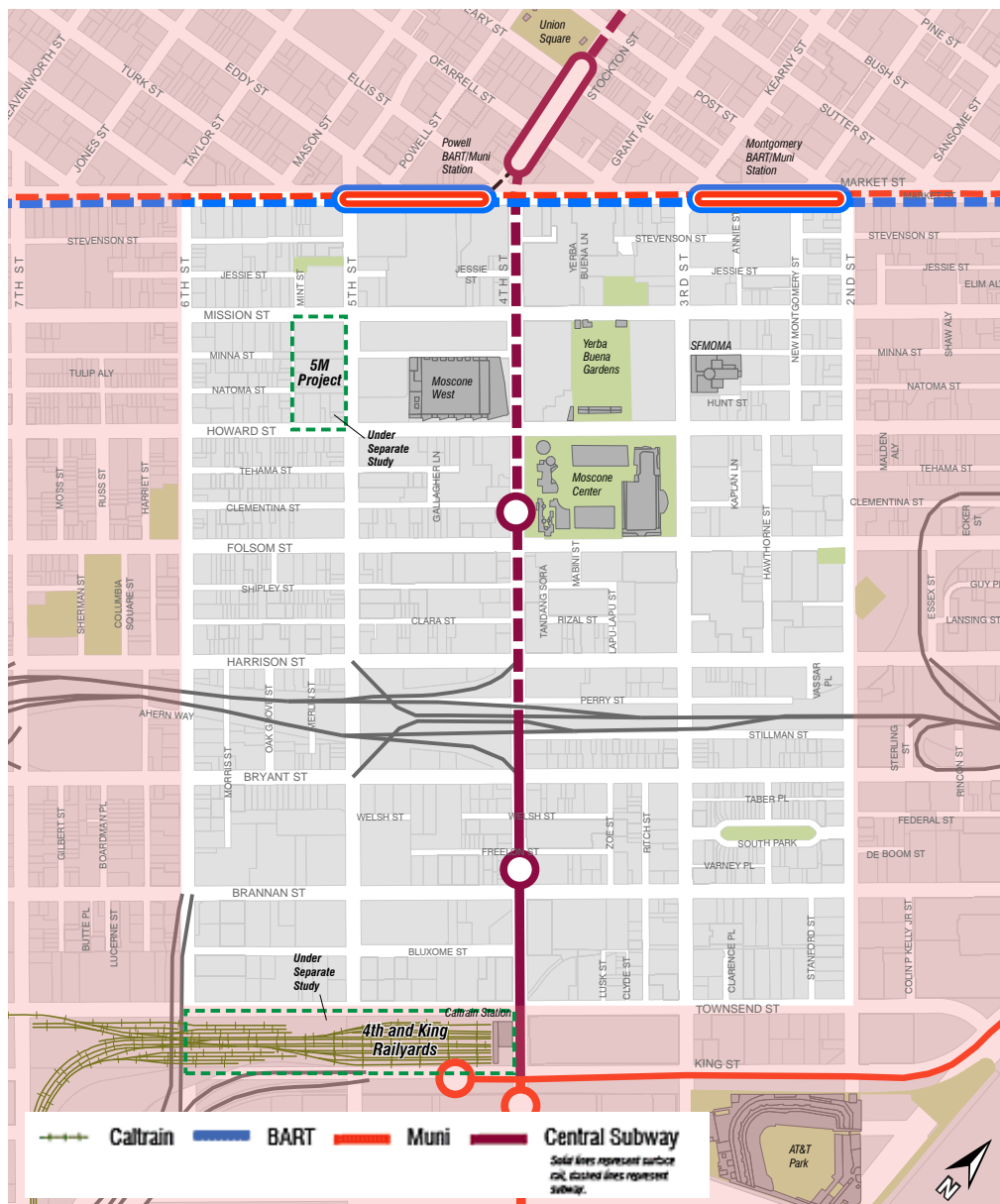
Recent years have seen a significant demand for growth in the central part of San Francisco's South of Market (SoMa) neighborhood, which is the bridge between the traditional central business district near Market Street and the burgeoning activity center of Mission Bay. In 2011, the Planning Department began the process to develop an integrated community vision for the southern portion of the Central Subway rail corridor, located generally in the vicinity of 4th Street between Townsend and Market streets (see map below).

The Central SoMa Draft Plan proposes to build off the neighborhood's success, while addressing many of its challenges, with a comprehensive strategy that will address such issues as land use, building size and heights, transportation, the public realm (including sidewalks and open space), preservation of historic buildings and environmental sustainability. Currently in draft form, the Plan is due to be adopted in 2016.

For more information visit:

<http://www.sf-planning.org/index.aspx?page=2557>

MAP 6
Central SOMA
Plan Area



Central SOMA Future Land Use

The proposed Central SOMA Draft Plan includes provisions for new housing, improved transportation, and historic preservation, but its primary goal is to support transit-oriented growth, particularly employment uses, in the area around the future Central Subway. When passed, the Plan will include rezoning of light-industrial parcels to allow more intensified office uses, and height increases clustered around major transit nodes.

- » The Draft Plan anticipates more than doubling the amount of commercial square footage allowed in the area, providing space for almost 47,000 jobs.
- » Rezoning would create more space for housing as well, up to 3,490 additional units in the Plan area. The Draft Plan includes strategies for ensuring that a significant portion of new units enabled be made affordable.

TABLE 5.3
Central SOMA Draft Plan

	Residential Sq. Ft.	Housing Units	Commercial Sq. Ft.	Jobs
Existing zoning	9,872,355	8,225	3,872,445	19,140
Growth Potential	4,185,900	3,490	5,563,700	27,820
TOTAL	14,058,255	11,715	9,436,145	46,960

Source: Planning Department



APPENDICES:

Appendices:

Table A-1 lists office space allocated in large office development projects under the Prop M Office Development Annual Limit Program from 2008 to 2014.

Table A-2 lists office space allocated in small office development projects under the Prop M Office Development Annual Limit Program, from 2008 to 2014.

Table A-3 lists Jobs Housing Linkage Fees collected since the Office Affordable Housing Production Program (as it was then known) was established in 1985.

Table A-4 lists Downtown Park Fees collected from 1986 to 2014.

Table A-5 lists Child Care Fees collected from 1986 to 2014.

TABLE A-1.
Large Office Approvals, FY2008–2014

Year	Unallocated Square Feet From Previous Year	Adjusted Annual Limit	Project Name / Address	Size	Total Allocated in Year
2007-2008	2,992,332	3,867,332	100 California	68,775	
			654 Minnesota (UCSF)	65,430	
			505-525 Howard	74,500	
			"680 Folsom Street (Yerba Buena Redevelopment Area)"	117,000	
			Mission Bay Alexandria District**	1,122,980	
			"600 Terry Francois (Mission Bay Alexandria District - East Campus)*"	"0 (up to 312,932)**"	
			"650 Terry Francois (Mission Bay Alexandria District - East Campus)*"	"0 (up to 291,367)**"	
			"1450 Owens (Mission Bay Alexandria District - West Campus)*"	"0 (up to 61,581)**"	1,390,980
2008-2009	2,476,352	3,351,352	No Projects		0
2009-2010	3,351,352	4,226,352	850-870 Brannan Street	138,580	
			222 Second Street	430,650	569,230
2010-2011	3,657,122	4,532,122	350 Mission Street	340,320	
			Alexandria District	200,000	
			Treasure Island	0	540,320
2011-2012	3,991,802	4,866,802	Alexandria District	27,020	
			850-870 Brannan St	113,753	
			444 DeHaro St	90,500	
			460-462 Bryant St	59,475	
			185 Berry St	101,982	
			100 Potrero Ave.	70,070	
			601 Townsend Street	72,600	535,400
2012-2013	4,331,402	5,206,402	101 1st Street	1,370,577	
			181 Fremont Street	404,000	
			1550 Bryant Street	108,399	
			1100 Van Ness Ave	242,987	

Year	Unallocated Square Feet From Previous Year	Adjusted Annual Limit	Project Name / Address	Size	Total Allocated in Year
			3615 Cesar Chavez	94,799	
			345 Brannan Street	102,285	
			270 Brannan Street	189,000	
			333 Brannan Street	175,450	
			350 Mission Street	79,680	
			999 Brannan Street	143,292	
			1800 Owens Street	700,000	3,610,469
2013-2014	1,595,933	2,470,933	300 California Street	56,459	
			665 3rd Street	123,700	
			410 Townsend Street	76,000	
			888 Brannan Street	10,000	
			81-85 Bluxome Street	55,000	321,159
2014-2015	2,149,774	3,024,774	501-505 Brannan Street	137,446	
			100 Hooper Street	284,471	
			390 Main Street	137,286	559,203

Source: Planning Department

TABLE A-2.
Small Office Approvals, FY2008–2014

Year	Unallocated Square Feet From Previous Year	Adjusted Annual Limit	Project Name / Address	Size	Total Allocated in Year
2007-2008	1,020,660	1,095,660	654 Minnesota	43,939	43,939
2008-2009	1,095,660	1,170,660	No Projects	0	0
2009-2010	1,170,660	1,245,660	660 Alabama Street	39,691	39,691
2010-2011	1,205,969	1,280,969	No Projects	0	0
2011-2012	1,280,969	1,355,969	208 Utah / 201 Potrero	48,732	
			808 Brannan Street	43,881	
			275 Brannan Street	48,500	
			385 7th/1098 Harrison	42,039	
			375 Alabama Street	48,189	231,341
2012-2013	1,124,628	75,000	No Projects	0	0
2013-2014	1,199,628	75,000	3130 20th Street	32,081	
			660 3rd Street	40,000	72,081
2014-2015	1,202,547	75,000	340 Bryant Street	47,536	
			101 Townsend Street	41,206	88,742

Source: Planning Department

TABLE A-3.
Jobs-Housing Linkage (Formerly OAHPP) Fees Collected, 1986-2014

Year	Number of Projects Paying	Amount Collected
1986	0	\$0
1987	0	\$0
1988	0	\$0
1989	6	\$1,386,316
1990	2	\$1,530,250
1991	2	\$1,586,724
1992	0	\$0
1993	4	\$246,171
1994	3	\$73,506
1995	2	\$245,137
1996	1	\$20,769
1997	1	\$1,000,000
1998	5	\$2,766,662
1999	7	\$58,064
2000	11	\$10,753,894
2001	14	\$14,296,744
2002	8	\$4,799,188
2003	0	\$0
2004	3	\$270,380
2005	3	\$5,021,658
2006	3	\$6,750,711
2007	7	\$3,142,062
2008	3	\$1,819,887
2009	0	\$0
2010	1	(8,775)
2011	1	\$15,878
2012	5	\$567,229
2013	11	\$5,678,329
2014	16	\$11,974,893
TOTAL	119	\$73,995,677

Source: San Francisco Controller's Office FY2012-13 and 2013-14 Biennial Development Impact Fee Report

TABLE A-4.**Downtown Park Fees Collected, 1986–2014**

Year	Number of Projects Paying	Amount Collected
1986	0	\$0
1987	0	\$0
1988	1	\$772,326
1989	0	\$0
1990	3	\$1,034,680
1991	2	\$737,860
1992	0	\$0
1993	0	\$0
1994	0	\$0
1995	0	\$0
1996	0	\$0
1997	0	\$0
1998	1	\$16,310
1999	0	\$0
2000	2	\$906,042
2001	3	\$984,228
2002	7	\$3,569,257
2003	2	\$1,134,140
2004	0	\$0
2005	1	\$112,206
2006	1	\$25,117
2007	3	\$607,192
2008	0	\$0
2009	1	\$1,096,546
2010	2	\$346,922
2011	0	\$0
2012	0	\$0
2013	3	\$305,890
2014	4	\$1,152,910
TOTAL	36	\$12,801,626

Source: San Francisco Controller's Office FY2012-13 and 2013-14 Biennial Development Impact Fee Report

TABLE A-5.
Child Care Fees Collected, 1986–2014

Year	Number of Projects Paying	Amount Collected
1986	0	\$0
1987	0	\$0
1988	1	\$0
1989	0	\$133,944
1990	3	\$153,115
1991	2	\$1,011,773
1992	0	\$0
1993	0	\$26,217
1994	0	\$120,000
1995	0	\$60,000
1996	0	\$60,000
1997	0	\$0
1998	1	\$329,680
1999	0	\$0
2000	2	\$565,736
2001	3	\$110,472
2002	7	\$802,979
2003	2	\$768,894
2004	0	\$622,401
2005	1	\$56,103
2006	1	\$0
2007	3	\$406,824
2008	0	\$803,958
2009	1	\$548,273
2010	1	\$153,500
2011	2	\$377,427
2012	0	\$0
2013	6	\$551,982
2014	12	\$1,012,732
TOTAL	48	\$8,676,010

Source: San Francisco Controller's Office FY2012-13 and 2013-14 Biennial Development Impact Fee Report

ACKNOWLEDGMENTS

Mayor

Edwin M. Lee

Board of Supervisors

London Breed, *President*
Eric Mar
Mark Farrel
Julie Christensen
Katy Tang
Jane Kim
Norman Yee
Scott Weiner
David Campos
Malia Cohen
John Avalos

Planning Department

John Rahaim, *Director of Planning*
Gil Kelley, *Director of Citywide Planning*
Teresa Ojeda, *Manager, Information and Analysis Group*
Scott Edmondson, *Project Manager*
Paolo Ikezoe, *Lead Planner*
Adrienne Hyder, *Graphic Designer*
Paula Chiu, *Planner*

Planning Commission

Rodney Fong, *President*
Cindy Wu, *Vice-President*
Michael Antonini
Rich Hillis
Christine Johnson
Kathrin Moore
Dennis Richards

Historic Preservation Commission

Andrew Wolfram, *President*
Aaron Jon Hyland, *Vice-President*
Karl Hasz
Ellen Johnck
Richard S.E. Johns
Diane Matsuda
Jonathan Pearlman