

2013

San Francisco HOUSING INVENTORY



San Francisco Planning Department
April 2014



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4

- 1 Rincon Green - 333 Harrison Street - 375 units including 49 inclusionary below market-rate units; new construction
- 2 200 Dolores - 200 Dolores Street - 15 units including 2 inclusionary below market-rate units; new construction
- 3 Trinity Plaza - 1190 Mission Street - 481 units including 63 inclusionary below market-rate units; new construction
- 4 Etta Apartments - 1285 Sutter Street - 107 units with off-site below market-rate units; new construction - Emil Kara Photography

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Introduction

The *Housing Inventory* is the Planning Department's annual survey of housing production trends in San Francisco. It has reported changes in the City's housing stock, including housing construction, demolition, and alterations, since 1967. This report is 44th in the series and presents housing production activity during the year 2013.

By monitoring changes in San Francisco's housing stock, the *Housing Inventory* provides a basis for evaluating the housing production goals and policies of the *Housing Element* of the *San Francisco General Plan*. Housing policy implications that may arise from data in this report, however, are not discussed here.

The *Housing Inventory* reports housing production, which begins when a building permit application for a project is filed with the City. The application is first reviewed by the Planning Department for compliance with the *Planning Code*, zoning, and other applicable policies. If the Planning Department approves the project, the Department of Building Inspection (DBI) reviews the application for compliance with the Building Code. If DBI approves the application, it issues a permit authorizing construction. The next step is for the project sponsor to begin construction on the project. Once construction has been completed and passed all required inspections, DBI issues a Certificate of Final Completion (CFC) for the project.

The *Housing Inventory* also reports the annual net gain in housing units citywide by general Zoning Districts and by Planning Districts. Net gain is the number of newly constructed units with CFCs issued, adjusted for alterations – which can add or subtract units – and demolitions. Affordable housing, condominiums, and changes in the residential hotel stock are other areas of interest covered by the *Housing Inventory*. In addition, the report provides a regional perspective by examining housing construction activity and home prices for the nine-county Bay Area region. Finally, major projects completed,

authorized, under review, or in the pipeline are listed in Appendix A. The *Housing Inventory* also summarizes housing production trends in the Better Neighborhoods and Eastern Neighborhoods plan areas in Appendix B. These plan areas have separate monitoring reports that detail housing production trends.

This report was prepared from information received from a number of different sources including the Department of Building Inspection, the Department of Public Works and Planning Department records. The Mayor's Office of Housing, the San Francisco Housing Authority and the Office of Community Investment and Infrastructure (Successor Agency to the San Francisco Redevelopment Agency) provided information on affordable housing projects. The California Homebuilding Foundation/Construction Industry Research Board provided Bay Area building permit data. The California Association of Realtors provided housing costs. Project sponsors also contributed data.

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.

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Key Findings

Housing Production

- New housing production in 2013 totaled 2,499 units. This includes 2,330 units in new construction and 169 new units added through conversion of non-residential uses or expansion of existing structures.
- Some 537 units were lost through demolition (429), unit mergers (38), or removal of illegal units (70).
- There was a net addition of 1,960 units to the City's housing stock in 2013, a 49% increase from 2012. This is on par with the 10-year average of 1,932 and represents a continuing upward trend in net unit production from the lowest production point of 2011.
- By the end of 2013, there were approximately 376,083 dwelling units in San Francisco. Approximately 33% are single-family homes, 31% are in buildings with two to nine units, and 36% are in buildings with 10 or more units.
- In 2013, 3,168 units were authorized for construction. This represents a 19% decrease from 2012. New housing authorized for construction over the past five years continues to be overwhelmingly (88%) in buildings with 20 or more units.
- The Planning Department approved and fully entitled 45 projects in 2013. These projects propose a total of 2,552 units.
- In 2013, 2,586 new condominiums were recorded – a 165% increase over 2012. A majority (92%) of those units were in buildings with 20 units or more. Condominium conversions decreased in 2013 – 369 units or 24% less than those converted in 2012.
- Much of the new housing development in 2013 were concentrated in the South of Market Planning District, where about 27% of net new units were built, followed by the Downtown and Mission Planning Districts, with 25% and 13% share, respectively, of new housing constructed.

Affordable Housing

- In 2013, 712 new affordable housing units were built, a 39% increase from the previous year's production. These new affordable units made up 36% of new units added to the City's housing stock. This count includes 220 inclusionary units and 28 units added to existing structures.
- About 93% of the new affordable units are rentals affordable to very-low and low-income households.

Housing Production Process

The *Housing Inventory* describes net changes in the housing stock and details units that have been certified complete, units that were authorized for construction, and units that are under review by the Planning Department.

The housing production process begins with a project review by the Planning Department and ends with the issuance of a Certificate of Final Completion (CFC) by the Department of Building Inspection (DBI). Figure 1 outlines the main stages of the housing production process.

Units Reviewed by Planning Department and DBI

For most major projects, review by the Planning Department is the first step in the process. Proposals are reviewed by the Planning Department for compliance with the *Planning Code*, the *General Plan*, environmental requirements, and other regulations and policies. Generally, only major projects require special Planning Department approvals, such as a conditional use permit or variance. The number and type of projects undergoing Planning Department review are indicators of current building interest and production expectation within the next two to five years. Following Planning Department approval and entitlements, the Department of Building Inspection (DBI) reviews the project for compliance with the *Building Code*.

Units Authorized for Construction

If DBI approves the project following its own review, it issues building permits authorizing con-

struction. Projects with approved building permits generally start construction within 90 days from the date the permit is issued. Start of construction, however, may be delayed for up to a year. If the permit is not picked up or acted on within 90 days, the permit expires. The number of units authorized for construction is a key indicator of future housing construction.

Units Certified Complete

Projects are inspected by DBI at various stages throughout the construction process. However, inspectors only issue Certificates of Final Completions (CFCs) for projects that are deemed 100% complete. Units certified complete are an indicator of changes to the City's housing supply and include units gained or lost from new construction, alterations, and demolitions.

For the purposes of this report, however, units that have received Temporary Certificates of Occupancy (TCOs) or "Final Inspection Approval" from the Department of Building Inspection are also considered and counted as completed units.

Housing production is measured in terms of units rather than projects because the number of units in a project varies. Not all projects reviewed or approved are built. A project's building permit application may be withdrawn, disapproved, or revised; its permit may also expire if, for example, a project is not financed. Housing production is also affected by changes in market conditions and the economy. However, once building construction starts, a project is usually completed within one to two years, depending on the size of the project.

FIGURE 1.
The Housing
Production Process



Housing Stock

The number of units in San Francisco’s housing stock is derived by taking the total units from the decennial census count as baseline, then adding net unit change each subsequent year until the next census. Because the 2010 Census did not collect detailed housing characteristics, this 2013 Housing Inventory uses data from the 2010 Five Year American Community Survey (2010 ACS5). Annual net unit change – the sum of units completed from new construction and alterations minus units lost from demolition and alterations – will be added to this 2010 ACS5 baseline count.

According to the 2010 ACS5, housing units in San Francisco totaled 376,083, with near equal distribution between single family units (33%), moderate density buildings (two to nine units – 31%), and

higher density structures (10 or more units – 36%). This distribution has been the same for the last 5 years and will likely change in the next few years as the trend has been moving towards increasingly larger buildings.

In 2013, there was a net gain of 1,960 units in the City’s housing stock. As of December 2013, units in buildings with 20 or more units comprised 26% of the City’s total housing. Of all units added since the 2010 ACS5, 90% have been in buildings with 20 units or more.

Table 1 provides a profile of San Francisco’s housing stock by building type from 2010 through 2013. Figure 2 illustrates San Francisco’s housing stock by building type for 2013.

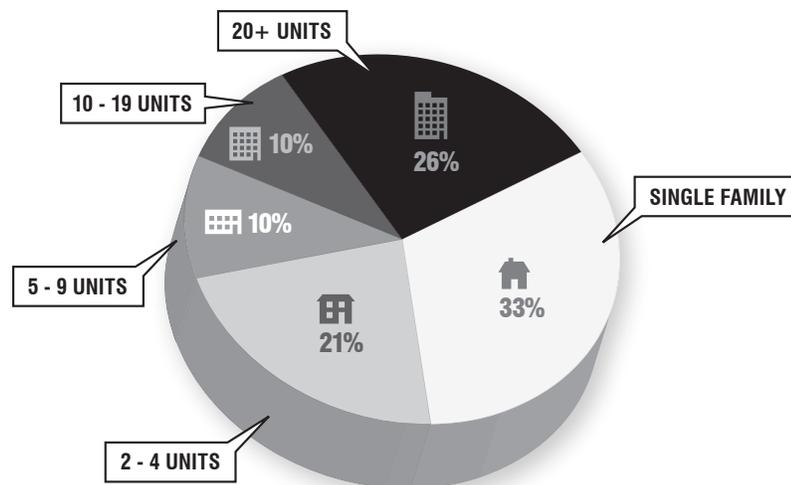
TABLE 1.
San Francisco Housing Stock by Building Type, 2010-2013

Building Type	Single Family	2 to 4 Units	5 to 9 Units	10 to 19 Units	20 + Units	Total
2010 ACS5	123,951	79,774	37,088	37,656	93,496	372,560*
Net Added 2011-2013	44	100	37	157	3,185	3,523
TOTAL	123,995	79,844	37,125	37,813	96,681	376,083

Source: U.S. Census Bureau; Planning Department

* This total includes other “housing” types that the Census Bureau counts, such as mobile homes, RVs, vans, and houseboats (625 units).

FIGURE 2.
San Francisco Housing Stock by Building Type, 2013



Housing Production Trends

New Housing Construction

- New construction unit totals for 2013 – 2,330 – is a significant three-fold increase from 2012. New construction in 2013 is 26% over the 10-year average of 1,846 new construction units.
- Conversion of non-residential uses resulted in 105 new units and 64 new units were added through expansion of existing structures. However, 110 units were lost due to removal of illegal units, mergers, conversion to non-residential use and to corrections to administrative records.

This means a net of 59 units were added to the housing stock through “alterations” of existing units or buildings. This represents a dramatic drop from the 650 units added in 2012 as a result of alterations.

- Four hundred twenty-nine units were demolished in 2013. This steep threefold increase from 2012 is due to the demolition of the 418-unit Trinity Plaza.
- In 2013, net addition to the City’s housing stock grew 49% from 2012. This 2013 net new unit count of 1,960 is on par with the 10-year average of 1,932 units.
- Affordable units made up 36% of new units built in 2013.
- In 2013, the Department of Building Inspection (DBI) authorized 3,168 units for construction according to building permit data. That number represents 19% less units authorized in 2012 (3,888).

Table 2 and Figures 3 and 4 show housing production trends over the past 20 years. The table and figures account for net new units gained – which is the number of units newly constructed and adjusted for alterations, which can add or subtract units, and demolitions. Figure 5 illustrates five-year housing production activity from 2009-2013.

Some of the larger projects completed in 2013 include: 1190 Mission Street (355 market-rate units and 63 affordable inclusionary units), Rincon Green (277 market rate units and 49 affordable inclusionary units), Nema (279 market rate units and 38 affordable inclusionary units). The Rene Cazenave Apartments at 25 Essex Street (100% affordable 120 units) and the Helen Rogers Senior Community Housing (100% affordable 100 units) are two major affordable housing projects completed in 2013.

A list of all market rate projects with 10 units or more completed in 2013 is included in Appendix A-1. Appendix A-2 includes all major affordable housing projects completed in 2013.

TABLE 2.
San Francisco Housing Trends, 1994-2013

Year	Units Authorized for Construction	Units Completed from New Construction	Units Demolished	Units Gained or Lost from Alterations	Net Change In Number of Units
1994	948	1,234	25	(23)	1,186
1995	525	532	55	(76)	401
1996	1,228	909	278	52	683
1997	1,666	906	344	163	725
1998	2,336	909	54	19	874
1999	3,360	1,225	98	158	1,285
2000	2,897	1,859	61	(1)	1,797
2001	2,380	1,619	99	259	1,779
2002	1,478	2,260	73	221	2,408
2003	1,845	2,730	286	52	2,496
2004	2,318	1,780	355	62	1,487
2005	5,571	1,872	174	157	1,855
2006	2,332	1,675	41	280	1,914
2007	3,281	2,197	81	451	2,567
2008	2,346	3,019	29	273	3,263
2009	752	3,366	29	117	3,454
2010	1,203	1,082	170	318	1,230
2011	2,033	348	84	5	269
2012	3,888	794	127	650	1,317
2013	3,168	2,330	429	59	1,960
TOTAL	45,555	32,646	2,892	3,196	32,950

Source: Planning Department

Note: Net Change equals Units Completed less Units Demolished plus Units Gained or (Lost) from Alterations.

FIGURE 3.
20-Year Housing
Production Trends,
1994-2013

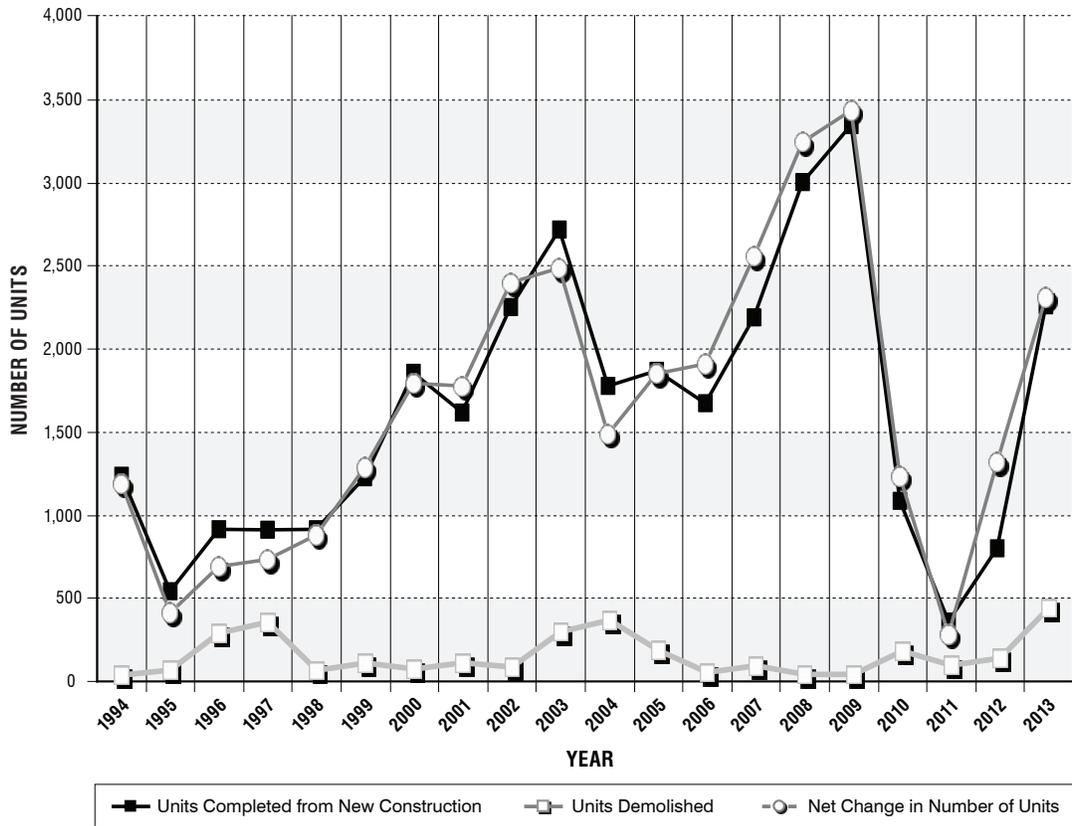


FIGURE 4.
Units Authorized
and Completed,
1994-2013

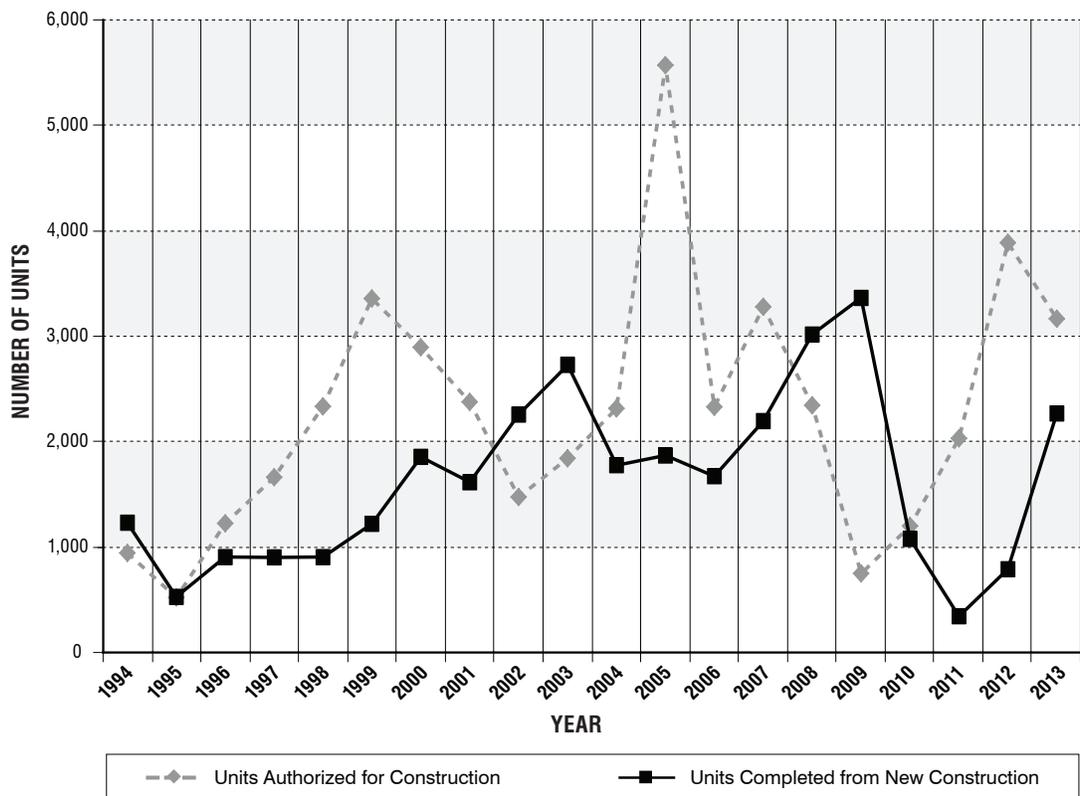
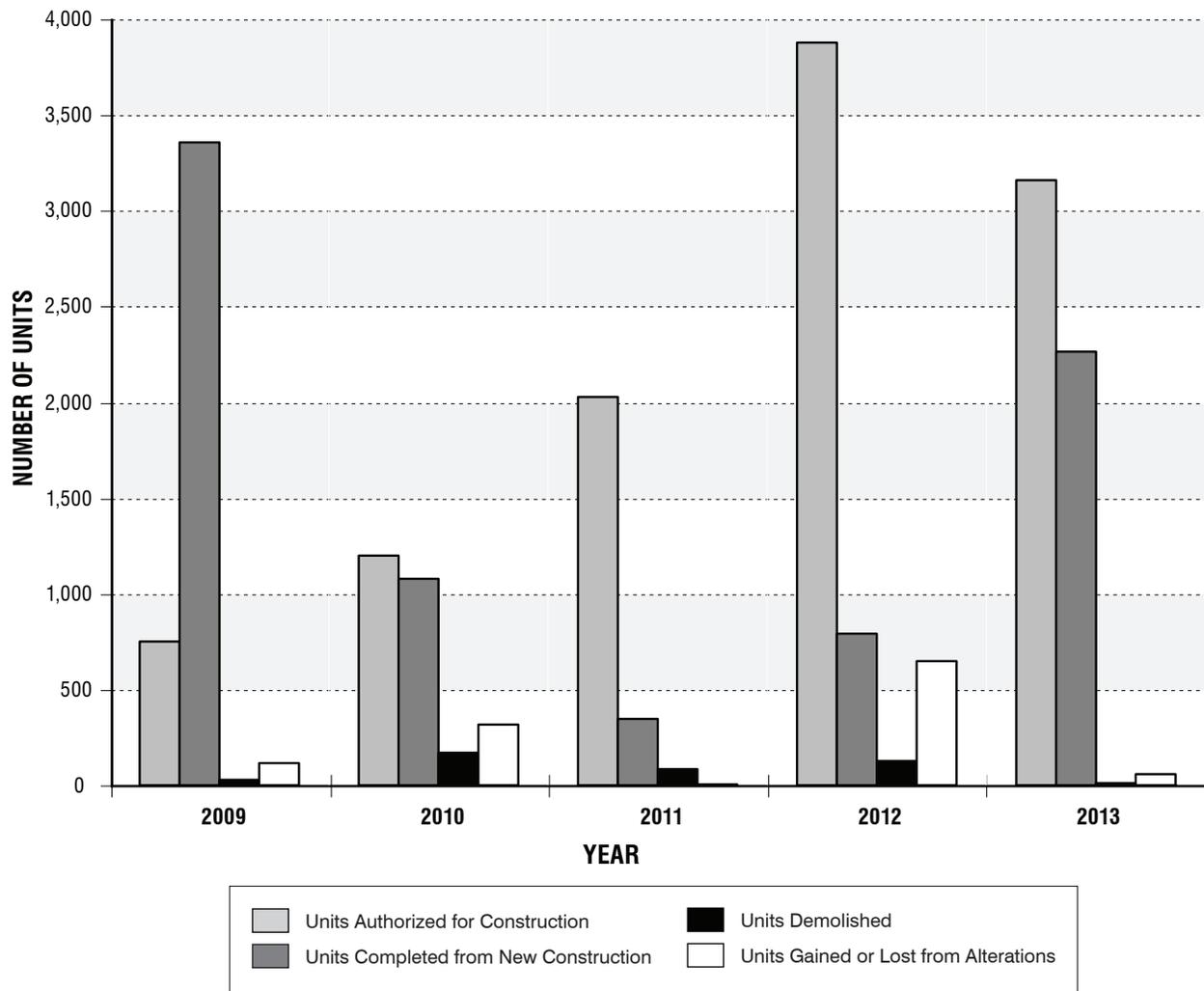


FIGURE 5.

Units Authorized and Gained from New Construction, Alterations, and Demolitions, 2009-2013



Projects Approved and Under Review by Planning

Depending on the type of project, there are various approvals by the Planning Department that a project needs to be fully entitled. Full entitlement of a project means that the project sponsor can proceed with the next step in the development process: securing approval and issuance of the building permit.

- In 2013, 288 projects with about 4,840 units were filed with the Planning Department. This number is higher than the count in 2012 (2,548 units) by 90% and is almost double that of the five-year average (2,262).

- The Planning Department approved and fully entitled 45 projects in 2013. These projects propose a total of 2,552 units, including 781 net units in the development of 1 Henry Adams Street and an addition of 190 net units to the affordable housing stock from the development of 1400 Mission Street.
- As of December 31, 2013, the total number of units under review at the Planning Department was around 7,400 units.

Table 3 shows the number of housing projects filed with the Planning Department over the last five years. It is important to note that Planning may not approve all projects under review or may

not approve projects at the unit levels requested. Project sponsors may also change or withdraw the project proposals. Some projects listed in Table 3 as undergoing Planning Department review may have reached their approval stage, been authorized for construction, or may have been completed. Lastly, many of the housing projects under development by the Office of Community Investment and Infrastructure (OCII) do not show up in Table 3 because the OCII is just responsible for the review of those projects.

Very large projects (200 units or more) filed in 2013 and are under Planning Department review include: Seawall Lot 337/ Pier 48 or Mission Rock

TABLE 3.
Projects and Units Filed at Planning Department for Review, 2009-2013

Year	Projects Filed	Units Filed
2009	85	902
2010	72	2,001
2011	52	1,020
2012	182	2,548
2013	288	4,840
TOTAL	679	11,311

Source: Planning Department

(1,500 units); 150 Van Ness Avenue (429 units); 41 Tehema Street (398 units); 1066 Market (330 units); 950 Market Street (316 units); and 1301 16th Street (276 units).

Appendix A-3 records major projects (10 units or more) that received Planning entitlements in 2013. Appendix A-4 contains a list of the major projects (10 or more units) filed at the Planning Department for review during 2013.

Units Authorized for Construction

- In 2013, DBI authorized 3,168 units for construction, 19% less than 2012. This number, on the other hand is also 143% higher than the five-year average (2,202). Since units authorized for construction is one of the indicators of future housing construction, the number of new units completed is expected to increase over the next few years.
- There were less projects authorized in 2013, 135 compared to 152 projects in 2012. In 2013 the average project size was 23 units or about 50% more than the average development size for the five years between 2009 and 2013 (16).

Table 4 summarizes the number of projects and units by building type authorized for construction by the Department of Building Inspection (DBI).

TABLE 4.
Units and Projects Authorized for Construction by DBI by Building Type, 2009-2013

Year	Units by Building Type					Total	Projects
	Single Family	2 Units	3 to 4 Units	5 to 19 Units	20+ Units		
2009	37	71	51	106	487	752	135
2010	45	69	55	128	906	1,203	142
2011	24	77	66	121	1,710	1,998	152
2012	22	66	33	107	3,660	3,888	124
2013	36	76	35	42	2,979	3,168	135
TOTAL	164	359	240	504	9,742	11,009	688

Source: Planning Department

- Some of the major projects authorized for construction during the reporting year include: 280 Beale Street (479 units); 399 Fremont Street (452 units); 360 Fremont Street (384 units); and 690 Long Bridge Street (273 units).

Appendix A-5 lists all projects with five or more units authorized for construction in 2013.

Demolitions

- A total of 429 units were demolished in 2013. This is a steep increase in the number of units demolished from 2012 (238%). Demolition of the 418-unit Trinity Plaza made up the bulk of this year's numbers.
- The demolition of the 11 units in 2013 is 255% above the five-year demolition average of 168 units.

Table 5 shows the units demolished between 2009 and 2013 by building type and Table 6 shows the demolitions in 2013 by Zoning District.

It should be noted that city policies require a minimum of one to one replacement of demolished housing.

Alterations and Conversions

The majority of building permits issued by DBI are for residential alterations. These alteration permits are for improvements within existing buildings or dwelling units. Some alterations expand the building envelope without increasing the number of units in the building. The *Housing Inventory* is primarily concerned with alterations which result in a net loss or gain in the total number of units in the housing stock.

Dwelling units are gained by additions to existing housing structures, conversions to residential use, and legalization of illegal units. Dwelling units are lost by merging separate units into larger units, by conversion to commercial use, or by the removal of illegal units.

- The net gain of 59 units from alterations in 2013 is comprised of 169 units added and 110 units eliminated.
- Net units gained through alterations decreased significantly from net units gained the previous year – 59 units in 2013 compared to 650 in 2012, or a 91% drop. This decline is a result of significantly fewer units added through alterations or conversions and an increase in the number of units lost through legalization, mergers and conversions.
- Of the 110 units lost through alteration in 2013, 70 were illegal units removed, 38 units were lost due to mergers, and two unit was a correction to official records. This represents a four-fold increase in units lost through alterations from 2012 (27).

Table 7 shows the number of units added or eliminated through alteration permits from 2009 to 2013. Table 8 profiles the type of alterations and demolitions that caused the loss of units during the same period.

- The net total of 121 units lost in 2013 due to demolition or alteration is 21% less than that in 2012 when 154 total units were lost. Nevertheless, this is equivalent to 5% of new units gained through new construction in 2013.

TABLE 5.
Units Demolished by Building Type, 2009-2013

Year	Buildings	Units by Building Type				Total
		Single	2 Units	3 to 4 Units	5+ Units	
2009	14	20	6	3	-	29
2010	28	6	6	35	123	170
2011	17	12	6	-	66	84
2012	23	-	10	32	85	127
2013	11	11	-	-	418	429
TOTAL	93	49	28	70	692	839

Source: Planning Department

TABLE 6.
Units Demolished by Zoning District, 2013

Zoning District	Buildings	Units		Total	Percent of Total
		Single Family	Multi-Family		
C-3-G	1	-	418	418	97%
RH-1	4	4	-	4	1%
RH-2	4	4	-	4	1%
RH-3	1	1	-	1	0.2%
RM-1	1	1	-	1	0.2%
UMU	1	1	-	1	0.2%
TOTAL	11	11	418	429	100%

Source: Planning Department

TABLE 7.
**Units Added or Lost
 Through Alteration Permits,
 2009-20113**

Year	Units Added	Units Eliminated	Net Change
2009	178	61	117
2010	356	38	318
2011	70	65	5
2012	677	27	650
2013	169	110	59
TOTAL	1,450	301	1,149

Source: Planning Department

TABLE 8.
Units Lost Through Alterations and Demolitions, 2009-2013

Year	Alterations					Units Demolished	Total Units Lost
	Illegal Units Removed	Units Merged into Larger Units	Correction to Official Records	Units Converted	Total Alterations		
2009	2	42	5	12	61	29	90
2010	5	22	1	10	38	170	208
2011	39	22	1	3	65	84	149
2012	2	23	1	1	27	127	154
2013	70	38	2	-	110	429	539
TOTAL	118	147	10	26	301	839	1,140

Source: Planning Department

New Housing Unit Trends

New construction and residential conversions are the primary engine behind changes to the housing stock. This section examines units added to the housing stock over the past five years by looking at the types of buildings and the Zoning Districts where they occurred. For 2013, this section examines all units added to the housing stock, not just those added through new construction.

Types of Buildings

- New housing units added over the past five years continues to be overwhelmingly (87%) in buildings with 20 or more units.
- Twenty-four single-family units were added in 2013, matching the previous year's addition. However, single-family building construction made up a very small proportion of new construction in 2013 (1%).
- New units were added in the "3-9 Units" and in "10-19 Units" categories (131 units and 122 units, respectively).

- The share of units added in high-density buildings (20 or more units) is at par with the five-year average of 87%.

Table 9 shows new construction from 2009 through 2013 by building type. Figure 6 shows the share of new construction by building type for 2013.

New Housing Units Added by Zoning District

A little over a third (37%) of new units built in 2013 were in Commercial Districts. Neighborhood Commercial Transit Districts followed with 25%.

Table 10 summarizes new construction in 2013 by generalized Zoning Districts. Table 11 lists the number of units constructed in various Zoning Districts in the City. A complete list of San Francisco's Zoning Districts is included in Appendix C.

TABLE 9.
Housing Units Built by Building Type, 2009-2013

Year	Single Family	2 Units	3 to 9 Units	10 to 19 Units	20+ Units	Total
2009	36	88	94	71	3,077	3,366
2010	45	46	102	39	1,206	1,438
2011	20	60	69	48	221	418
2012	24	40	82	98	1,227	1,471
2013	24	0	131	122	2,222	2,499
TOTAL	149	234	478	378	7,953	9,192
Share of Total Units Added, 2009-2013	2%	3%	5%	4%	87%	100%

Source: Planning Department

FIGURE 6.
Housing Units Built by Building Type, 2013

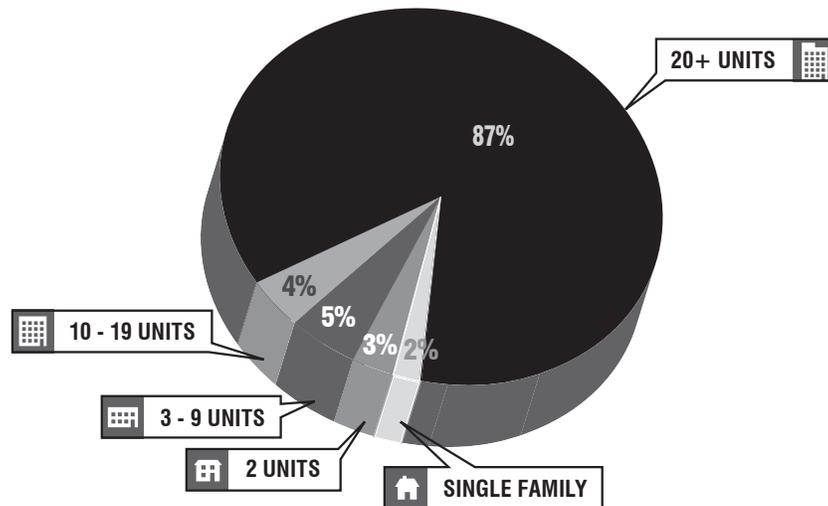


TABLE 10.
Housing Units Added by Generalized Zoning, 2013

General Zoning Districts	Units	Percent of Total	Rank
Residential, Downtown (DTR)	446	19%	3
Residential, House and Mixed (RH, RM)	154	6%	4
Residential, Transit Oriented (RTO)	23	1%	8
Commercial (RC, RCD, C-3-G)	891	37%	1
Neighborhood Commercial (NC, NCD)	133	6%	5
Neighborhood Commercial Transit (NCT)	603	25%	2
Chinatown Mixed Use (CCB)	2	0.1%	9
Eastern Neighborhoods Mixed Use (MUR, UMU)	90	4%	6
South of Market Mixed Use (RED, RED-MX)	36	2%	7
TOTAL	2,378	100%	

Source: Planning Department

TABLE 11.
Housing Units Added by Zoning District, 2013

Zoning Districts	Units	Percent of Total	Rank
C-3-G	735	30.9%	1
C-3-S	60	2.5%	10
CCB	2	0.1%	23
DTR-Rincon Hill/ DTR- South Beach	326	13.7%	2
DTR-Transbay/ DTR- Rincon Hill	120	5.0%	6
MUR	48	2.0%	11
NC-1	20	0.8%	17
NC-2	35	1.5%	14
NCD-POLK STREET	76	3.2%	8
NCD-TARAVAL STREET	2	0.1%	22
NCT-24TH-MISSION	9	0.4%	21
NCT-3	294	12.4%	3
NCT-HAYES	63	2.6%	9
NCT-MISSION	202	8.5%	4
NCT-UPPER MARKET	18	0.8%	18
NCT-VALENCIA STREET	17	0.7%	20
RC-4	114	4.8%	7
RCD	1	0.0%	27
RED	37	1.6%	13
RED-MX	(1)	0.0%	28
RH-1	(69)	-2.9%	30
RH-1(D)	(4)	-0.2%	29
RH-2	18	0.8%	19
RH-3	16	0.7%	21
RM-1	146	6.1%	5
RM-2	2	0.1%	25
RM-3	24	1.0%	15
RM-4	2	0.1%	26
RTO	23	1.0%	16
UMU	42	1.8%	12
TOTAL	2,378	100%	

Source: Planning Department

Condominiums

All condominium developments, whether new construction or conversions, are recorded with the Department of Public Works's (DPW) Bureau of Street-Use and Mapping (BSM). Annual condominium totals recorded by DPW do not directly correlate with annual units completed and counted as part of the *Housing Inventory* because DPW's records may be for projects not yet completed or from projects completed in a previous year. Large multi-unit developments also file for condominium subdivision when they are first built even though the units may initially be offered for rent. Condominium construction, like all real estate, is subject to market forces and varies from year to year.

New Condominium Construction

- New condominium construction in 2013 jumped to 2,586 units from 976 units in 2012 (an increase of 165%).
- Approximately 92% of the condominiums recorded were in buildings with 20 or more units (2,381 units or a 200% increase from 2012).

Table 12 shows construction of new condominiums recorded by DPW over the past ten years and Table 13 shows new condominium construction by building type over the past five years.

TABLE 12.
New Condominiums Recorded by DPW, 2004-2013

Year	Units	% Change from Previous Year
2004	1,215	-42%
2005	1,907	57%
2006	2,466	29%
2007	3,395	38%
2008	1,897	-44%
2009	835	-56%
2010	734	-12%
2011	1,625	121%
2012	976	-40%
2013	2,586	165%
TOTAL	17,636	

Source: Department of Public Works, Bureau of Street-Use and Mapping

TABLE 13.
New Condominiums Recorded by the DPW by Building Type, 2009-2013

Year	2 Units	3 to 4 Units	5 to 9 Units	10 to 19 Units	20+ Units	Total
2009	54	82	72	12	615	835
2010	22	24	21	0	667	734
2011	28	52	37	58	1,450	1,625
2012	34	51	22	76	793	976
2013	18	24	33	130	2,381	2,586
TOTAL	156	233	185	276	5,906	6,756

Source: Department of Public Works, Bureau of Street-Use and Mapping

Condominium Conversions

The San Francisco Subdivision Code regulates condominium conversions. Since 1983, conversions of units from rental to condominium have been limited to 200 units per year and to buildings with six or fewer units. More than 200 units may be recorded in a given year because units approved in a previous year may be recorded in a subsequent year. The 200-unit cap on conversions can also be bypassed for two-unit buildings with owners occupying both units.

- Condominium conversions were down 24% in 2013 (369 from 488 conversions in 2012) . This number is 35% lower than the 10-year average of 563 units
- About 54% of units converted in 2013 occurred in two-unit buildings, representing an decrease of 32% from 2012.
- Seventy-six percent of the condominium conversions in 2013 (279) were in buildings with two or three units, compared to 79% in 2010.

Table 14 shows the number of conversions recorded by DPW from 2004-2013. Table 15 shows condominium conversions by building type over the past five years.

TABLE 14.
Condominium Conversions Recorded by DPW, 2004-2013

Year	Units	% Change from Previous Year
2004	303	-30%
2005	306	1%
2006	727	138%
2007	784	8%
2008	845	8%
2009	803	-5%
2010	537	-33%
2011	472	-12%
2012	488	3%
2013	369	-24%
TOTAL	5,634	

Source: Department of Public Works, Bureau of Street-Use and Mapping

TABLE 15.
Condominium Conversions Recorded by DPW by Building Type, 2009-2013

Year	2 Units	3 Units	4 Units	5 to 6 Units	Total
2009	508	141	132	22	803
2010	322	87	100	28	537
2011	302	87	72	11	472
2012	290	96	80	22	488
2013	198	81	68	22	369
TOTAL	1,620	492	452	105	2,669

Source: Department of Public Works, Bureau of Street-Use and Mapping

Residential Hotels

Residential hotels in San Francisco are regulated by Administrative Code Chapter 41 — the Residential Hotel Conversion and Demolition Ordinance (HCO), enacted in 1981. The Department of Building Inspection (DBI) Housing Inspection Services Division administers the HCO. This ordinance preserves the stock of residential hotels and regulates the conversion and demolition of residential hotel units.

Table 16 reports the number of residential hotel buildings and units for both for-profit and nonprofit residential hotels from 2009 through 2013.

- As of 2013, 19,382 residential hotel rooms are registered in San Francisco; 72% are residential rooms in for-profit residential hotels and 28% are residential in non-profit hotels.

- Residential rooms in non-profit residential hotels have been increasing in the past five years. In the last five years, non-profit residential hotel rooms increased a little over 7% and for-profit residential and tourist hotel rooms have slightly decreased.
- According to DBI, there have been no changes in the residential hotel stock since 2012.

TABLE 16.
Changes in Residential Hotel Stock, 2009-2013

Year	For Profit Residential Hotels			Non-Profit Residential Hotels		Total	
	<i>Buildings</i>	<i>Resid. Rooms</i>	<i>Tourist Rooms</i>	<i>Buildings</i>	<i>Resid. Rooms</i>	<i>Buildings</i>	<i>Resid. Rooms</i>
2009	418	14,040	2,953	87	5,105	505	19,145
2010	412	13,790	2,883	87	5,163	499	18,953
2011	417	13,680	2,805	88	5,230	505	18,910
2012	414	13,903	2,942	87	5,479	501	19,382
2013	414	13,903	2,942	87	5,479	501	19,382

Source: Department of Building Inspection

Affordable Housing

Standards and Definitions of Affordability

Affordable housing by definition is housing that is either rented or owned at prices affordable to households with low to moderate incomes. The United States Department of Housing and Urban Development (HUD) determines the thresholds by household size for these incomes for the San Francisco HUD Metro Fair Market Rent Area (HMFA). The HMFA includes San Francisco, Marin, and San Mateo counties. The standard definitions for housing affordability by income level are as follows:

Extremely low income: Units affordable to households with incomes at or below 30% of the HUD median income for the San Francisco HFMA;

Very low income: Units affordable to households with incomes at or below 50% of the HUD median income for the San Francisco HFMA;

Lower income: Units affordable to households with incomes at or below 60% of the HUD median income for the San Francisco HFMA;

Low income: Units affordable to households with incomes at or below 80% of the HUD median income for the San Francisco HFMA,

Moderate income: Units affordable to households with incomes at or below 120% of the HUD median income for the San Francisco HFMA; and

Market rate: Units at prevailing prices without any affordability requirements. Market rate units generally exceed rental or ownership affordability levels, although some small market rate units may be priced at levels that are affordable to moderate income households.

Housing affordability for units is calculated as follows:

Affordable rental unit: A unit for which rent equals 30% of the income of a household with an income at or below 80% of the HUD median income for the San Francisco HFMA, utilities included;

Affordable ownership unit: A unit for which the mortgage payments, PMI (principal mortgage insurance), property taxes, homeowners dues, and insurance equal 33% of the gross monthly income of a household earning between 80% and 120% of the San Francisco HFMA median income, assuming a 10% down payment and a 30-year 8% fixed rate loan.

Inclusionary Affordable Housing Program units: These units are rental units for households earning up to 60% of the San Francisco median income, or ownership units for first-time home buyer households with incomes from 70% to up to 110% of the San Francisco median income.

Tables 17 and 18 show the incomes and prices for affordable rental and ownership units based on 2013 HUD income limits.

TABLE 17.
2013 Rental Affordable Housing Guidelines

Income Levels	Household Size	Average Unit Size	Maximum Annual Income	Monthly Rent
Extremely Low Income (30% of HUD Median Income)	1	Studio	\$21,250	\$496
	2	1 Bedroom	\$24,300	\$561
	3	2 Bedroom	\$27,350	\$623
	4	3 Bedroom	\$30,350	\$677
	5	4 Bedroom	\$32,800	\$709
	6	5 Bedroom	\$35,200	\$750
Very Low Income (50% of HUD Median Income)	1	Studio	\$35,450	\$851
	2	1 Bedroom	\$40,500	\$966
	3	2 Bedroom	\$45,550	\$1,078
	4	3 Bedroom	\$50,600	\$1,183
	5	4 Bedroom	\$54,650	\$1,255
	6	5 Bedroom	\$58,700	\$1,338
Lower Income (60% of HUD Median Income)	1	Studio	\$42,500	\$1,028
	2	1 Bedroom	\$48,550	\$1,167
	3	2 Bedroom	\$54,652	\$1,305
	4	3 Bedroom	\$60,700	\$1,436
	5	4 Bedroom	\$65,600	\$1,529
	6	5 Bedroom	\$70,450	\$1,631
Low Income (80% of HUD Median Income)	1	Studio	\$56,700	\$1,383
	2	1 Bedroom	\$64,750	\$1,672
	3	2 Bedroom	\$72,900	\$1,762
	4	3 Bedroom	\$80,950	\$1,942
	5	4 Bedroom	\$87,450	\$2,075
	6	5 Bedroom	\$93,900	\$2,218

Source: U.S. Department of Housing and Urban Development (HUD)

Note: Incomes are based on the 2012 Area Median Income (AMI) limits for the San Francisco HUD Metro FMR Area (HMFA). Rents are calculated based on 30% of gross monthly income. (FMR = Fair Market Rents)

TABLE 18. 2013 Homeownership Affordable Housing Guidelines

Income Levels	Household Size	Average Unit Size	Maximum Annual Income	Monthly Housing Expense	Maximum Purchase Price
Low Income <i>(70% of HUD Median Income)</i>	1	Studio	\$47,550	\$1,308	\$162,631
	2	1 Bedroom	\$54,400	\$1,496	\$188,062
	3	2 Bedroom	\$61,200	\$1,683	\$213,721
	4	3 Bedroom	\$67,950	\$1,869	\$239,380
	5	4 Bedroom	\$73,400	\$2,019	\$258,449
Median Income <i>(90% of HUD Median Income)</i>	1	Studio	\$61,150	\$1,682	\$226,943
	2	1 Bedroom	\$69,950	\$1,924	\$261,692
	3	2 Bedroom	\$78,650	\$2,163	\$296,669
	4	3 Bedroom	\$87,400	\$2,404	\$331,418
	5	4 Bedroom	\$94,350	\$2,595	\$357,758
Moderate Income <i>(110% of HUD Median Income)</i>	1	Studio	\$74,750	\$2,056	\$291,483
	2	1 Bedroom	\$85,450	\$2,350	\$335,322
	3	2 Bedroom	\$96,150	\$2,644	\$379,389
	4	3 Bedroom	\$106,800	\$2,937	\$423,228
	5	4 Bedroom	\$115,350	\$3,172	\$457,295

Source: U.S. Department of Housing and Urban Development (HUD)

Note: Incomes are based on the 2012 Area Median Income (AMI) limits for the San Francisco HUD Metro FMR Area (HMFA). Monthly housing expenses are calculated based on 33% of gross monthly income. (FMR = Fair Market Rents). Maximum purchase price is the affordable price from San Francisco's Inclusionary Housing Program and incorporates monthly fees and taxes into sales price.

New Affordable Housing Construction

- Some 712 affordable units were completed in 2013, representing 36% of the new housing units added in 2013. Of these, 220 are on-site inclusionary affordable units.
- Very low-income units represented a little over half (63%) of the new affordable units that were constructed in 2013; low-income units made up 31%, and moderate income units made up about a 6%.

- The number of new affordable units (712) produced in 2013 was 39% more than in 2012 (513).
- A total of 44 units were added to existing residential buildings in 2013. Typically, these are smaller units and are sometimes referred to as secondary or “granny” units; these are also usually affordable to households with moderate incomes.

Figure 7 shows affordable housing construction compared to market-rate housing construction from 2009 to 2013 by year and as a total.

Major affordable housing projects completed in 2013 include: 25 Essex Street (120 units); 701 Golden Gate Avenue (100 units); 474 Natoma Street (60 units); 1075 Le Conte Avenue (73 units); 60 West Point Road (54 units); and 61 West Point Road (13 units).

Table 19 shows the production of affordable housing by levels of affordability and Table 20 shows new affordable housing by type. These numbers do not include affordable units that result from acquiring and rehabilitating residential buildings by nonprofit housing organizations. Those units are covered later in the report.

All major (10 or more units) new affordable housing projects completed in 2013 are detailed in Appendix A-2. On-site affordable inclusionary units are listed under major market rate projects. Affordable housing projects under construction, or in pre-construction or preliminary planning with either the Mayor’s Office of Housing or the Office of Community Investment and Infrastructure are presented in Appendix A-6.

FIGURE 7.
Development of Affordable and Market Rate Units, 2009-2013

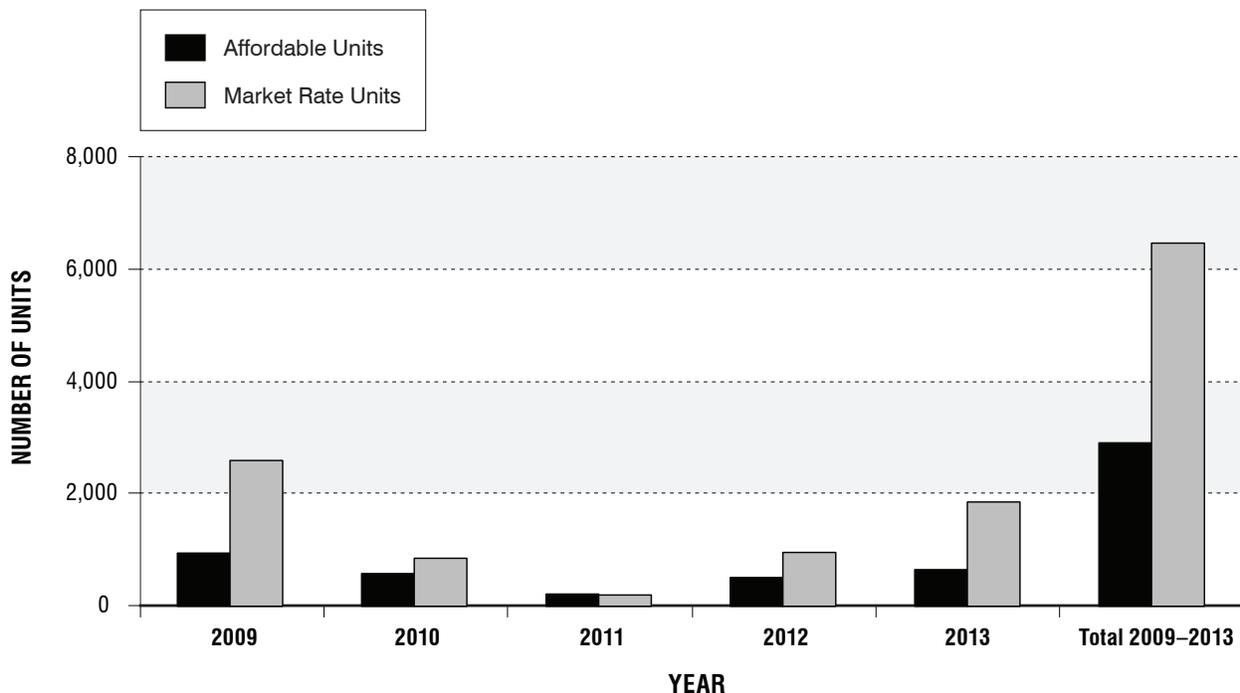


TABLE 19.
New Affordable Housing Construction by Income Level, 2009-2013

Year	Extremely Low (30% AMI)	Very Low (50% AMI)	Lower (60% AMI)	Low (80% AMI)	Moderate (120% AMI)	Total Affordable Units	Total All New Units	% of All New Units
2009	-	550	-	140	256	946	3,544	27%
2010	-	480	21	-	81	582	1,438	40%
2011	127	13	-	21	57	218	418	52%
2012	250	107	-	52	104	513	1,471	35%
2013	--	448	--	220	44	712	2,439	29%
TOTAL	377	1,598	21	433	542	2,971	9,310	32%

Source: Mayor's Office of Housing, Office of Community Investment and Infrastructure, Planning Department

TABLE 20.
New Affordable Housing Construction by Housing Type, 2009-2013

Year	Family	Senior	Individual/SRO	Homeowner	Total
2009	176	24	407	339	946
2010	128	348	59	47	582
2011	67	-	140	11	218
2012	157	-	269	87	513
2013	432	100	164	16	712
2013 Percent of Total	60.7%	14.0%	23.0%	2.2%	100%

Source: Planning Department, Mayor's Office of Housing, Office of Community Investment and Infrastructure

Note: Family units include projects with a majority of two or more bedroom units. Individual / SRO includes projects with a majority of or one bedroom, residential care facilities, shelters, and transitional housing.

Inclusionary Housing

In 1992, the Planning Commission adopted guidelines for applying the City's Inclusionary Affordable Housing Policy. This policy required housing projects with 10 or more units that seek a conditional use (CU) permit or planned unit development (PUD) to set aside a minimum of 10% of their units as affordable units. In 2002, the Board of Supervisors legislated these guidelines into law and expanded the requirement to all projects with 10 or more units. In condominium developments, the inclusionary affordable ownership units would be available to households earning up to 100% of the AMI; below market inclusionary rental units are affordable to households earning 60% or less of the area median income (AMI). If a housing project required a conditional use permit, then 12% of the units would need to be made available at the same levels of affordability.

In August 2006, the inclusionary requirements were increased to 15% if units were constructed on-site, and to 20% if constructed off-site and is applicable to projects of five units or more. These increases will only apply to new projects. All projects in the pipeline at the time these changes were adopted will be exempt from these increases, except for projects that have not yet received Planning Department approval and those that will receive a rezoning that increases the amount of housing that can be constructed on their property. Table 21 shows inclusionary units completed from 2009-2013.

- In 2013, the number of inclusionary units built almost doubled from 2012. The units built in 2013 represent a 76% increase from the 125 inclusionary units provided in 2012. Moreover, the 2013 inclusionary housing units are 150% above the five-year annual average of 88 units. This increase is due to the overall increase in units completed in 2013.
- All 220 inclusionary units completed in 2013 were the result of the on-site affordable housing requirement.

Appendix A-1 provides a complete list of projects with ten or more units constructed in 2013 with details of new construction with inclusionary units for those projects that have them.

In 2013, a total of \$9,130,671 was collected as partial payments of in-lieu fees for projects. Appendix D is a summary of in-lieu fees collected since 2004.

TABLE 21.
New Inclusionary Units, 2009-2013

Year	Units
2009	44
2010	40
2011	11
2012	125
2013	220
TOTAL	440

Source: Planning Department, Mayor's Office of Housing

TABLE 22. Housing Price Trends, San Francisco Bay Area, 2004-2013

Year	Rental (Two Bedroom Apartment)		For Sale (Two Bedroom House)	
	San Francisco	Bay Area	San Francisco	Bay Area
2004	\$2,068	N/A	\$670,450	\$547,190
2005	\$2,229	N/A	\$737,500	\$619,010
2006	\$2,400	N/A	\$680,970	\$612,250
2007	\$2,750	N/A	\$664,060	\$566,440
2008	\$2,650	\$1,810	\$603,570	\$370,490
2009	\$2,695	\$1,894	\$611,410	\$409,020
2010	\$2,737	N/A	\$560,980	\$383,550
2011	\$2,573	N/A	\$493,330	\$339,730
2012	\$3,000	\$1,818	\$655,170	\$436,440
2013	\$3,300	\$1,955	\$714,840	\$520,250

Source: Zillow.com for apartment rental prices. California Association of Realtors for home sale prices;
Notes: The California Association of Realtors Bay Area data do not include Napa and Sonoma Counties.

Affordability of Market Rate Housing

The San Francisco Bay Area remains one of the nation’s most expensive housing markets, with housing prices remaining high despite drops in average housing costs.

- In 2013, rental prices for a two-bedroom apartment in San Francisco increased by 10% to \$3,300 from \$3,000 in 2012.
- In 2013, the median price for a two-bedroom home in San Francisco went up to \$714,840 or 9% more than 2012 (\$655,170). The 2013 median price for a two-bedroom home in the Bay Area region was \$520,250 or an 19% decrease from the price in 2010 (\$436,440).
- A San Francisco family of three with a combined household income that is 110% of the HUD median income (a household which can afford a maximum sales price of \$379,389 according to Table 18) would fall about \$335,451 short of being able to purchase a median-priced two-bedroom home (\$714,840).

- A three-person household with a combined household income at 80% of the median income could pay a maximum rent of \$1,762 or 53% of the median rent (\$3,300).

Table 22 gives rental and sales prices for 2004 through 2013. The high cost of housing continues to prevent families earning less than the median income from being able to purchase or rent a median-priced home in San Francisco.

Affordable Housing Acquisition and Rehabilitation

Acquisition and rehabilitation involves non-profit housing organizations purchasing existing residential buildings in order to rehabilitate units for low- and very low-income persons. Table 23 shows units that have been rehabilitated through funding by the Mayor's Office of Housing (MOH) and the Office of Community Investment and Infrastructure (OCII). Often it is more economical to purchase and rehabilitate existing run-down units than to build new units. While many of these units are residential hotel (single room occupancy or SRO) units, acquisition and rehabilitation also includes homes for residential care providers, apartments for families, and conversions of commercial or industrial buildings for homeless persons and families.

The *Housing Inventory* reports units in such projects as adding to the housing stock only when new units are created as a result of the rehabilitation. For example, if a 50-unit SRO is rehabilitated and at the end, the SRO still has 50 units, then for the purposes of this report, these units would not be counted as adding to the housing stock.

- In 2013, 154 units of housing were rehabilitated as a result of the rehabilitation and preservation of the Arlington located at 472 Ellis Street.

TABLE 23.
Units Rehabilitated, 2009-2013

Year	Units Acquired / Rehabilitated
2009	16
2010	54
2011	329
2012	-
2013	154
TOTAL	553

Source: Mayor's Office of Housing, Office of Community Investment and Infrastructure

Changes in Housing Stock by Planning District

This section discusses the City's housing stock by Planning District. Map 1 shows San Francisco's 15 Planning Districts.

Table 24 summarizes newly constructed units completed, altered units, and units demolished in each Planning District. The table also ranks each Planning District by its position for each of the ratings categories.

- The Downtown Planning District had the most new construction in 2013 with 858 units built or 38% of the total new construction. However, with the demolition of the 418-unit Trinity Plaza, it had the second highest net gain or 22% of the 1,900 net addition citywide.

- The South of Market Planning District ranked first in net units gained (521 units or 27% of net units gained).
- The Downtown Planning District had the highest number of units demolished, with 418 units lost or 97% of the 429 total.

Figure 8 shows total new housing constructed and demolished by San Francisco Planning Districts in 2013.

MAP 1.
San Francisco Planning Districts



TABLE 24. Housing Units Completed and Demolished by Planning District, 2013

No.	District Name	Units Completed	Rank	Units Demolished	Rank	Units Altered	Rank	Net Gain Housing Units	Rank
1	Richmond	5	11	1	2	1	8	5	9
2	Marina	7	10	4	1	1	9	4	10
3	Northeast	80	8	0	9	11	6	91	8
4	Downtown	918	1	418	10	(14)	1	486	2
5	Western Addition	201	4	0	11	24	3	225	4
6	Buena Vista	113	7	0	12	14	5	127	6
7	Central	115	6	1	3	3	7	117	7
8	Mission	242	3	1	4	17	4	258	3
9	South of Market	485	2	1	5	37	2	521	1
10	South Bayshore	150	5	0	13	(2)	11	148	5
11	Bernal Heights	2	12	1	6	(1)	10	0	12
12	South Central	2	13	1	7	(13)	15	(12)	15
13	Ingleside	2	14	0	14	(6)	13	(4)	13
14	Inner Sunset	8	9	1	8	(3)	12	4	11
15	Outer Sunset	0	15	0	15	(10)	14	(10)	14
	TOTAL	2,330		429		59		1,960	

Source: Planning Department

*Note: The "net gain housing units" calculation accounts for units lost/gained by alterations but those figures are not displayed.

FIGURE 8. Units Completed & Demolished by Planning District, 2013

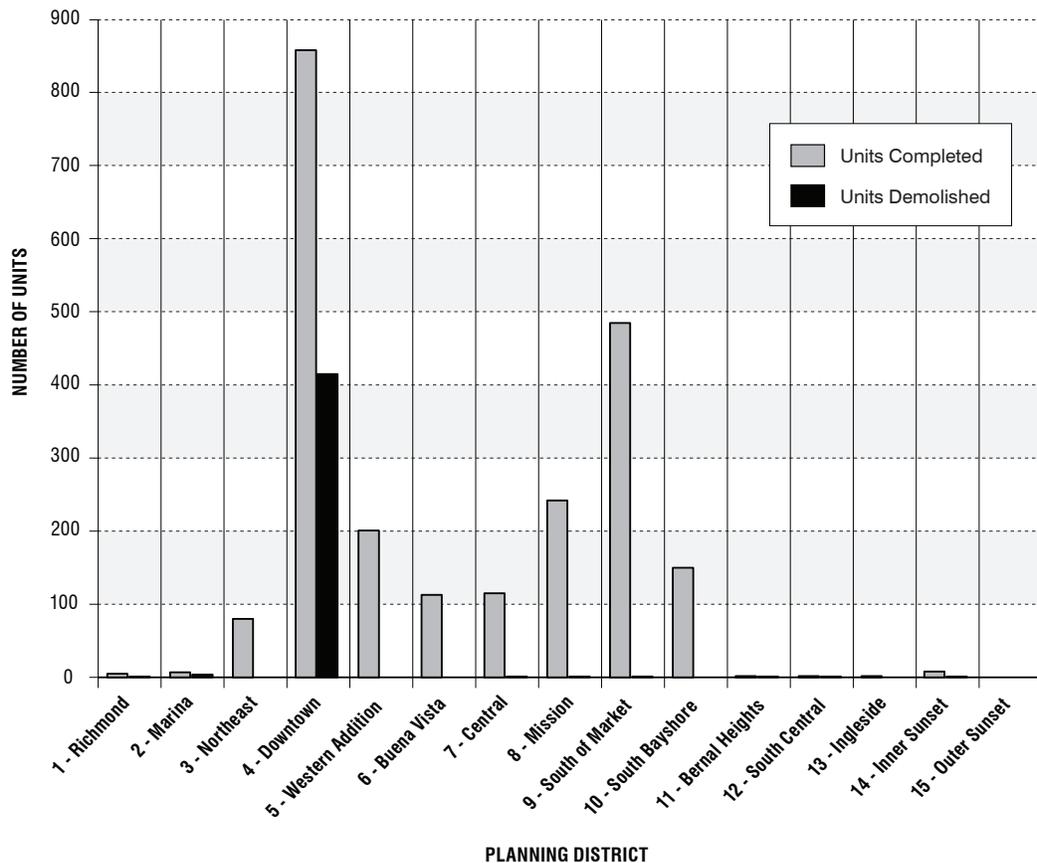
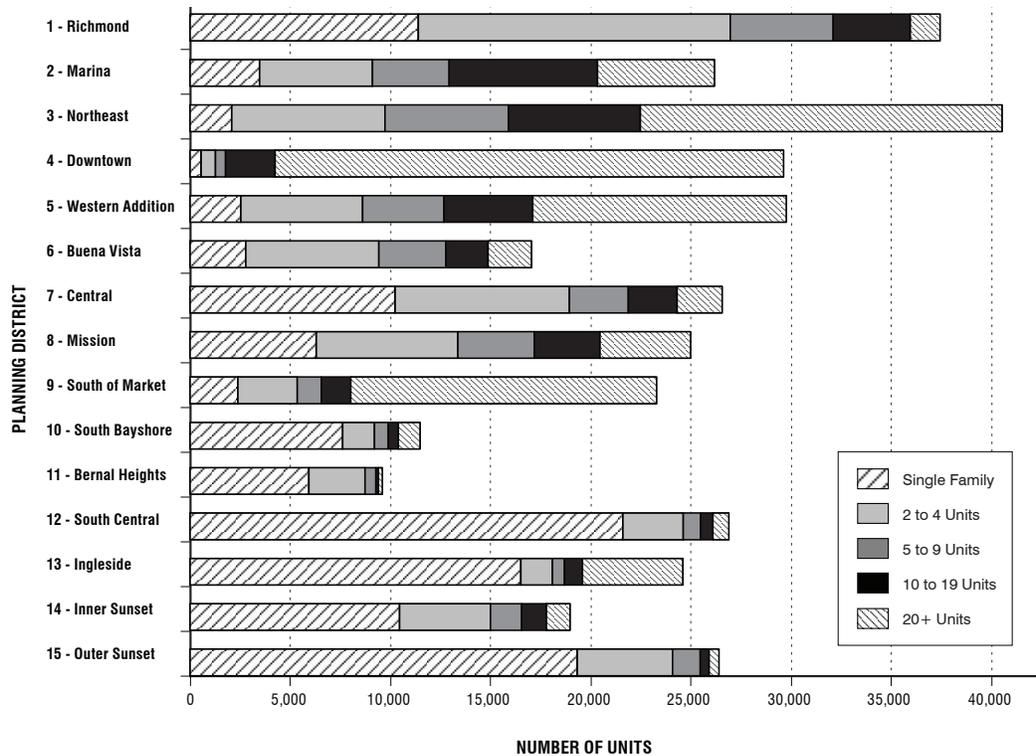


FIGURE 9.
San Francisco
Housing Stock
by Planning
District, 2013



Housing Stock by Planning District

Figure 9 shows the total overall housing stock by building type for the fifteen San Francisco Planning Districts. Table 25 contains San Francisco housing stock totals by Planning District and shows the net gain since the 2010 Census.

- The Northeast and Richmond Planning Districts continue to have the highest number of overall units, having 40,561 units and 37,432 units respectively. The Northeast District accounts for about 11% of the City’s housing stock, while the Richmond Planning District accounts for 10%.
- The South Central, Outer Sunset, and Ingleside Planning Districts remain the areas with the highest number of single-family homes in San Francisco. Together these areas account for almost 46% of all single-family homes.
- The Richmond, Central, Northeast, and Mission Planning Districts are the areas with the highest numbers of buildings with two to four units, representing 19%, 11%, 10%, and 9% of those units respectively.
- In the “5 to 9 Units” category, the Northeast and Richmond Planning Districts have the highest numbers of those units with 17% and 14% respectively.
- The Marina and Northeast Planning Districts continue to have the highest share of buildings with 10 to 19 units. Thirty seven percent of the City’s multi-family buildings with 10 to 19 units are in these districts.
- The Downtown Planning District has the largest stock of the city’s high-density housing – about 25,673 units. The Northeast Planning District is second with about 18,030 units. Eighty-five percent of all housing in the Downtown Planning District is in buildings with 20 or more units. This district accounts for 27% of all the high-density housing citywide. The Northeast Planning District, with 44% of its units in buildings with 20 units or more, claims 19% of the City’s high-density housing.

TABLE 25.
San Francisco Housing Stock by Planning District, 2010-2013

Planning District	Single Family	2 to 4 Units	5 to 9 Units	10 to 19 Units	20+ Units	District Total
1 - Richmond						
2010 ACS5	11,388	15,525	5,126	3,845	1,467	37,383
2011-2012	-	28	7	-	20	55
2013	(2)	9	-	(13)	-	(6)
TOTAL	11,386	15,562	5,133	3,832	1,487	37,432
Percent of Total	30.4%	41.6%	13.7%	10.2%	4.0%	10.0%
2 - Marina						
2010 ACS5	3,469	5,636	3,824	7,404	5,817	26,165
2011-2012	1	(4)	(6)	(8)	23	6
2013	(3)	6	(1)	2	-	4
TOTAL	3,467	5,638	3,817	7,398	5,840	26,175
Percent of Total	13.2%	21.5%	14.6%	28.3%	22.3%	7.0%
3 - Northeast						
2010 ACS5	2,080	7,621	6,147	6,585	17,965	40,462
2011-2012	-	21	-	2	3	26
2013	1	1	7	2	62	73
TOTAL	2,081	7,643	6,154	6,589	18,030	40,561
Percent of Total	5.1%	18.8%	15.2%	16.2%	44.5%	10.8%
4 - Downtown						
2010 ACS5	547	719	494	2,460	24,967	29,348
2011-2012	-	2	-	-	159	161
2013	-	7	1	13	547	568
TOTAL	547	728	495	2,473	25,673	30,077
Percent of Total	1.8%	2.4%	1.6%	8.2%	85.4%	8.0%
5 - Western Addition						
2010 ACS5	2,535	6,065	4,055	4,381	12,283	29,319
2011-2012	1	2	1	13	193	210
2013	-	7	2	31	174	214
TOTAL	2,536	6,074	4,058	4,425	12,650	29,743
Percent of Total	8.5%	20.4%	13.6%	14.9%	42.5%	7.9%
6 - Buena Vista						
2010 ACS5	2,777	6,633	3,339	2,099	2,062	16,950
2011-2012	(3)	7	1	-	-	5
2013	1	7	-	6	113	127
TOTAL	2,775	6,647	3,340	2,105	2,175	17,082
Percent of Total	16.2%	38.9%	19.6%	12.3%	12.7%	4.5%
7 - Central						
2010 ACS5	10,219	8,671	2,935	2,398	2,167	26,395
2011-2012	2	24	5	-	-	31
2013	5	3	9	17	81	115
TOTAL	10,226	8,698	2,949	2,415	2,248	26,541
Percent of Total	38.5%	32.8%	11.1%	9.1%	8.5%	7.1%

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Planning District	Single Family	2 to 4 Units	5 to 9 Units	10 to 19 Units	20+ Units	District Total
8 - Mission						
2010 ACS5	6,295	7,026	3,797	3,221	4,205	24,566
2011-2012	3	22	11	33	96	165
2013	-	9	7	35	202	253
TOTAL	6,298	7,057	3,815	3,289	4,503	24,984
Percent of Total	25.2%	28.2%	15.3%	13.1%	18.1%	6.6%
9 - South of Market						
2010 ACS5	2,379	2,933	1,207	1,428	14,070	22,061
2011-2012	1	32	-	25	664	722
2013	2	(16)	-	13	508	507
TOTAL	2,382	2,949	1,207	1,466	15,242	23,290
Percent of Total	10.2%	12.7%	5.2%	6.2%	65.4%	6.2%
10 - South Bayshore						
2010 ACS5	7,614	1,614	700	514	890	11,404
2011-2012	(3)	(32)	(17)	(19)	66	(5)
2013	3	(2)	5	10	117	133
TOTAL	7,614	1,580	688	505	1,073	11,532
Percent of Total	66.0%	13.6%	6.0%	4.4%	9.4%	3.1%
11 - Bernal Heights						
2010 ACS5	5,926	2,796	537	130	199	9,629
2011-2012	2	6	-	-	-	8
2013	1	(1)	-	-	-	-
TOTAL	5,929	2,801	537	130	199	9,637
Percent of Total	61.5%	29.1%	5.6%	1.3%	2.1%	2.6%
12 - South Central						
2010 ACS5	21,602	3,005	858	589	800	26,866
2011-2012	(9)	8	5	18	-	22
2013	-	(13)	-	-	-	(13)
TOTAL	21,593	3,000	863	607	800	26,875
Percent of Total	80.3%	11.2%	3.2%	2.3%	3.0%	7.1%
13 - Ingleside						
2010 ACS5	16,497	1,565	606	900	4,832	24,424
2011-2012	4	2	-	-	173	179
2013	4	(10)	-	1	-	(5)
TOTAL	16,505	1,557	606	901	5,005	24,598
Percent of Total	67.0%	6.4%	2.5%	3.7%	20.3%	6.5%
14 - Inner Sunset						
2010 ACS5	10,450	4,528	1,555	1,226	1,188	18,951
2011-2012	-	4	-	-	-	4
2013	1	3	-	-	-	4
TOTAL	10,451	4,535	1,555	1,226	1,188	18,959
Percent of Total	55.1%	23.9%	8.2%	6.5%	6.3%	5.0%

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Planning District	Single Family	2 to 4 Units	5 to 9 Units	10 to 19 Units	20+ Units	District Total
15 - Outer Sunset						
2010 ACS5	19,321	4,750	1,385	442	495	26,427
2011-2012	(4)	1	-	-	-	(3)
2013	-	(14)	-	-	-	(14)
TOTAL	19,317	4,737	1,385	442	495	26,410
Percent of Total	73.1%	17.9%	5.2%	1.7%	1.9%	7.0%
Presidio, Treasure Island and Golden Gate Park						
2010 ACS5	852	687	523	34	89	2,185
2011-2012	-	-	-	-	-	-
2013	-	-	-	-	-	-
TOTAL	852	687	523	34	89	2,185
Percent of Total	39.0%	31.4%	23.9%	1.6%	4.1%	0.6%
Citywide						
2010 ACS5	123,951	79,774	37,088	37,656	93,496	372,535
2011-2012	(5)	123	7	64	1,397	1,586
2013	13	(4)	30	117	1,804	1,960
TOTAL	123,959	79,893	37,125	37,837	96,697	376,081
Percent of Total	33.0%	21.2%	9.9%	10.1%	25.7%	100.0%

Source: Planning Department

Housing Construction in the Bay Area

This section provides a regional context to the City's housing production trends. San Francisco is one of nine counties that make up the Bay Area.

- In 2013, Bay Area counties authorized 19,551 units for construction, 17% more than the 2012 authorizations of 16,660 units.
- Santa Clara (41%), San Francisco (16%), and Alameda (15%) counties accounted for almost three-quarters (72%) of the units authorized.
- In San Francisco, 99% of new housing is in multi-family buildings. Santa Clara (77%), San Mateo (71%), Sonoma (71%), Marin (70%) also have a

high percentage of authorized units in multi-family structures. Single-family housing units predominate in Contra Costa (81%) and Solano (65%).

Map 2 shows the nine counties that make up the Greater San Francisco Bay Area. Table 26 shows the total number of units authorized for construction for San Francisco and the rest of the Bay Area for 2013. Figure 10 shows trends in housing construction by building type from 2004 to 2013.



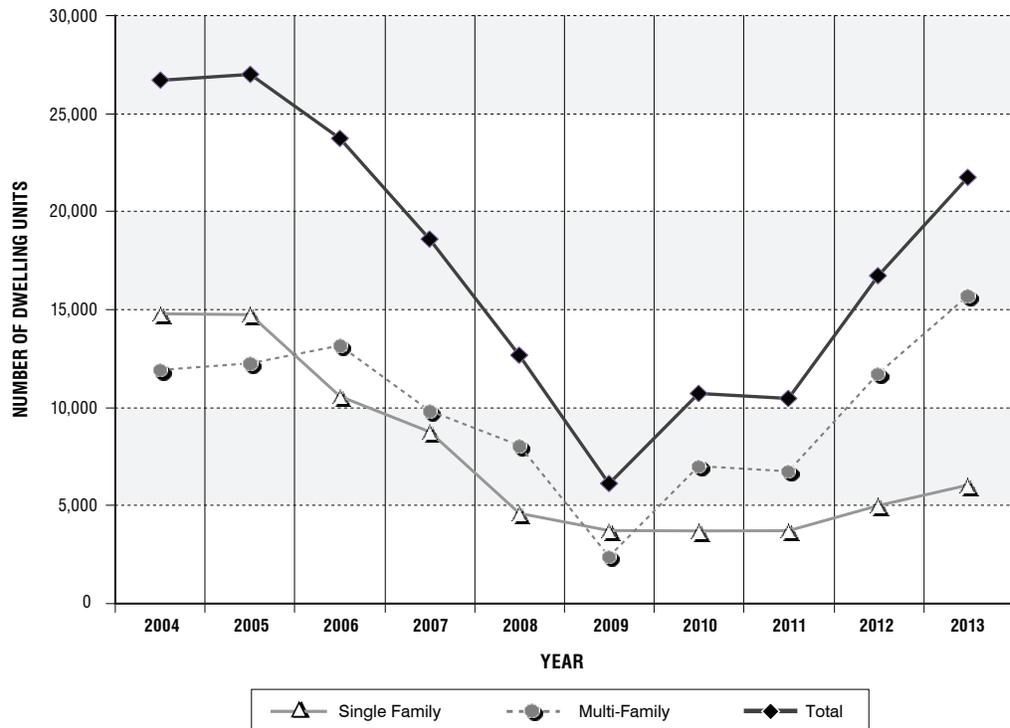
MAP 2.
San Francisco Bay Area Counties

TABLE 26.
Units Authorized for Construction for San Francisco and the Bay Area Counties, 2013

County	Single-Family Units	Multi-Family Units	Total Units	Percent of Total
Alameda	1,201	1,760	2,961	15%
Contra Costa	1,533	370	1,903	10%
Marin	89	207	296	2%
Napa	105	140	245	1%
San Francisco	35	3,133	3,168	16%
San Mateo	340	849	1,189	6%
Santa Clara	1,859	6,099	7,958	41%
Solano	525	281	806	4%
Sonoma	293	732	1,025	5%
TOTAL	5,980	13,571	19,551	100%

Source: California Homebuilding Foundation

FIGURE 10.
Bay Area Housing Construction Trends, 2004-2013



Source: Construction Industry Research Board, from 2004–2011; California Homebuilding Foundation

APPENDICES

Appendix A: Project Lists

This Appendix details major projects in various stages of the planning or construction process: projects under Planning Department review, projects that have been authorized for construction by the Department of Building Inspection, and projects that have been completed. A project's status changes over time. During a reporting period, a project may move from approved to under construction or from under construction to completed. Similarly, a project may change from rental to condominiums, or vice versa, before a project is completed or occupied.

Table A-1 details major market-rate housing projects with ten or more units that were completed in 2013. This list also includes the number of inclusionary units in the project.

Table A-2 is comprised of major affordable housing projects with ten or more units that were completed in 2013.

Table A-3 provides information for all projects with ten or more units that were fully entitled by the Planning Department in 2013. These projects typically require either a conditional use permit, environmental review, or some other type of review by the Planning Commission or Zoning Administrator, or the Environmental Review Officer.

Table A-4 provides information for all projects with ten or more units that were filed with the Planning Department in 2013. These projects require a conditional use permit, environmental review, or other types of review by the Planning Commission, Zoning Administrator, or the Environmental Review Officer. This list does not include projects submitted for informal Planning project review and for which no applications have been filed.

Table A-5 contains residential projects with ten or more units authorized for construction by DBI in 2013.

Table A-6 is an accounting of affordable housing projects in the “pipeline” — projects that are under construction, or in pre-construction or preliminary planning with either the Mayor's Office of Housing or the Office of Community Investment and Infrastructure.

Appendix B: Planning Area Annual Monitoring

Tables in *Appendix B* have been added to the *Housing Inventory* to comply in part with the requirements of Planning Code §341.2 and Administrative Code 10E.2 to track housing development trends in the recently-adopted community area plans. These plan areas also have separate monitoring reports that discuss housing production trends in these areas in greater detail.

Table B-1 details 2013 housing trends in recently adopted planning areas.

Table B-2 summarizes the units entitled by the Planning Department in 2013 by planning areas.

Table B-3 summarizes units gained from new construction in 2013 by planning areas.

Table B-4 summarizes units demolished in 2013 by planning areas.

Table B-5 summarizes units lost through alterations and demolitions in 2013 by planning areas.

Table B-6 summarizes affordable housing projects for 2013 in planning areas.

Appendix C: San Francisco Zoning Districts

Appendix D: In-Lieu Housing Fees Collected

Appendix E: Glossary

TABLE A-1.
Major Market Rate Housing Projects Completed, 2013

Project Name / Address	Total Units	Affordable Units	Unit Mix	Tenure Type	Initial Sales or Rental Price
1190 Mission Street / 1190 Mission at Trinity Place	418	63	Studio: 4 Junior Bedroom: 290 One Bedroom: 66 Two Bedroom: 58	RENTAL	From \$2,300
333 Harrison Street / Rincon Green	326	49	Studio: One Bedroom: Two Bedroom:	RENTAL	From \$2,395 From \$2,796 From \$3,600
8 10th Street / 1407 Market Street / Nema	317	38	Studio: One Bedroom: Two Bedroom:	RENTAL	From \$2,456 From \$3,353 From \$5,300
1600 15th Street / 1880 Mission Street / Vara	202	40	Studio: 28 One Bedroom: 118 Two Bedroom: 45 Three Bedroom : 14	RENTAL	From \$2,800 From \$3,250 From \$4,375 From \$5,000
1844 Market Street / Venn Apartments	113	14	One Bedroom: Two Bedroom: Three Bedroom:	RENTAL	From \$3,035 From \$4,035 From \$4,985
1285 Sutter Street / Etta Apartments	107	In-Lieu	Studio: One Bedroom: Two Bedroom:	RENTAL	From \$2,950 From \$3,250 From \$4,000
38 Dolores Street / 38 Dolores	81	In-Lieu	One Bedroom: Two Bedroom: Three Bedroom:	RENTAL	From \$2,950 From \$3,800 From \$8,100
300 Ivy Street / 401 Grove Street / 300 Ivy	63	9	One Bedroom: 24 Two Bedroom: 34 Three Bedroom : 5	OWNERSHIP	From \$1.2 million
1595 Pacific Avenue / Pacific Terrace	41	In-Lieu	One Bedroom: Two Bedroom: Three Bedroom:	RENTAL	From \$ 3,000 From \$ 4,200 From \$ 6,800
1461 Pine Street	35	In-Lieu	One Bedroom: Two Bedroom:	RENTAL	From \$ 2,800 From \$ 3,750
48 Harriet Street	23	Exempt	N/A	RENTAL	N/A
1301 Divisadero Street	21	4	N/A	N/A	N/A

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Project Name / Address	Total Units	Affordable Units	Unit Mix	Tenure Type	Initial Sales or Rental Price
2652 Harrison Street	20	In-Lieu	One Bedroom: 11 Two Bedroom: 9	RENTAL	From \$ 3,100 From \$ 4,195
1816 Eddy Street	19	N/A	N/A	N/A	N/A
2299 Market Street / ICON	18	In-Lieu	One Bedroom: Two Bedroom:	N/A	N/A
3500 19th Street / 3500 Nineteenth	17	N/A	One Bedroom: 1 Two Bedroom: 12	N/A	N/A
616 20th Street	16	2	One Bedroom: Two Bedroom:	OWNERSHIP	N/A
2829 California Street	13	2	Two Bedroom: 9 Three Bedroom: 4	OWNERSHIP	From \$ 1,250,000 From \$ 1,700,000
537 Natoma Street	13	1	One Bedroom: Two Bedroom:	OWNERSHIP	N/A
200 Dolores Street	13	2	One Bedroom: 1 Two Bedroom: 11 Three Bedroom: 1	OWNERSHIP	N/A

Source: Planning Department, Mayor's Office of Housing; Office of Community Investment and Infrastructure

TABLE A-2.
Major Affordable Housing Projects Completed, 2013

Project Name / Address	Units	Unit Mix	Tenure Type	Price (Rental or Selling)	AMI % Targets	Type of Housing
25 Essex Street / Rene Cazenave Apartments	120	Studio: 120	N/A	N/A	VLI	Individual / SRO
701 Golden Gate Avenue / Helen Rogers Senior Community	100	Studio: 28 One Bedroom: 72	RENTAL	From \$844 From \$957	VLI	Senior
1075 Le Conte Avenue / Bayview Hill Gardens	73	Studio: 17 One Bedroom: 24 Two Bedroom: 24 Three Bedroom: 8	RENTAL	From \$300 From \$300 From \$350 From \$350	VLI	Family
474 Natoma St / Natoma Court Bridge Housing	60	Studio, One, Two and Three Bedroom	RENTAL	N/A	VLI	Family
60 West Point Road / HOPE SF	54	N/A	N/A	N/A	VLI	Family
374 5th Street	44	Studio: 44	RENTAL	From \$1,300		Individual / SRO
61 West Point Road / HOPE SF	13	N/A	N/A	N/A	VLI	Family

Source: Planning Department, Mayor's Office of Housing; Office of Community Investment and Infrastructure

TABLE A-3.
Major Housing Projects Reviewed and Entitled by Planning Department, 2013

Planning Case No.	Address / Project Name	Case Description	No. Units	Approval Date	Body	Action	Action No.
2000.618 E	801 BRANNAN/1 HENRY ADAMS STREET	Demolish an existing building (Concourse Exhibit Hall) containing 125,000 square feet of space and 280 surface parking spaces and construct new buildings extending up to 70 feet in height and containing 560 dwellings, 438 off-street parking space, and 8,0...	781	41305	CPC	Approved	18792
2011.1043 C X	1400 MISSION STREET	New high rise residential building with approximately 190 affordable dwelling units and a podium courtyard. Parking, retail, bike storage/repair/community space, residential entrance and utility spaces will be located on the ground floor. 167 of the units...	190	17-Jan-13	CPC	APPRWC	18784
2008.1084 E H R T X Z	706 MISSION ST	The proposed project would result in partial demolition and rehabilitation of the Arson Mercantile Building into a new 42-story, 500-foot high building containing 185 residences, retail, and the 36,560 sf Mexican Museum. The proposed project would also include...	185	21-Mar-13	CPC	Approved	18829
2011.0702 C X	101 POLK ST	"The proposed project is the construction of a 13-story, 162-unit residential building with 51 subgrade parking spaces on a site that currently contains a surface parking lot. The project feature 62 two-bedroom units, 87 one bedrooms, and 13 studios."	162	9-May-13	CPC	Approved-Modifications	18864
2005.0694 C S	2554 - 2558 MISSION STREET	The project is a PUD and new construction of up to 125 units of residential over ground floor commercial on the site of to-be-demolished Giant Value store, adjacent to the New Mission Theater, which would be renovated to include theater, restaurant, and...	114	10-Jan-13	CPC	Approved w/ conditions	18775
2011.0312 C V X	1321 Mission Street/104 - 9th Street	To demolish existing building and construct a new mixed-use building of 120 feet in height, 11 stories, with 180 dwelling units, over 3,359 sf ground level commercial and a basement in a C-3-S zoning district. The project would provide one car-share space...	80	24-Jan-13	CPC	APPRWC	18789
2012.0325 C S	344 FULTON STREET (PARCEL F)	Sponsor is proposing to subdivide the lot and construct two structures (1) a four-story, 60,049 sf Boys & Girls Club clubhouse and recreation facility, including a pool, gymnasium and administrative offices, and (2) a six-story, 36,609 sf building with 60-...	75	14-Mar-13	CPC	Approved-Modifications	18827
2005.0408 E K X I	2290 3RD STREET	Demolition of an existing one-story, commercial building and construction of a six-story, mixed-use building with 80 dwelling units, 80 off street parking spaces and approx. 14,000 GSF of ground floor commercial use.	71	8-Aug-13	MEA	CPE Approved	

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Planning Case No.	Address / Project Name	Case Description	No. Units	Approval Date	Body	Action	Action No.
2011.0119 C V	200-214 6TH STREET	The proposed project is the demolition of an existing 144 room hotel building and construction of a new mixed - use building with 56 affordable dwelling units, approximately 3,074 sq.ft. of retail, and 15 off-street parking spaces.	44	1-Aug-13	CPC	Approved w/ conditions	18938
2012.0081 C V	450 HAYES STREET	The proposed project would construct a new 4-story residential building with 41 residential units, 20 parking spaces, and 3,300 sf of retail space. The proposed building would be 17,399 sf with a full basement level. The lobby and two retail store fronts...	41	11-Jul-13	CPC	Approved Modifications	18922
2004.0482 C	5400 GEARY BL	Existing theater building would be preserved - second floor would be expanded to create a full second floor full-service restaurant (preserving one theater screen) and ground floor would be for retail use. New four-story mixed-use building would be cons...	39	25-Apr-13	CPC	Approved with Conditions	18853
2004.0093 C E V	San Francisco Overlook (a.k.a 599 Crestmont Drive)	The proposed project would involve the construction of 34 dwelling units and 40 off-street parking spaces in four new buildings on an undeveloped site. The residential buildings would four stories in height, approximately 20 feet in height from grade....	34	7-Mar-13	CPC	Approved	18820, 18819
2012.0083 C V	400 Grove Street	The proposed project would construct new market rate housing development consisting of up to 34 residential units, 2,000 sf of retail space, and 17 below grade parking spaces. The proposed building will be 55-foot tall fronting on Gough Street and 45-feet...	33	31-Jan-13	CPC	APPR/WC	18795
2002.0333 C	270 VALENCIA ST	Residential, commercial and accessory parking. Proposed project would demolish a one-story structure of approximately 9,337 sf and construct a four-story, 28 units residential building over 3,533 sf of ground-floor retail and 31 off street parking in the ...	28	15-May-13	CPC	Approved	16579
2008.0538 C	1490 OCEAN AVENUE	Demolition of an existing gas station with accessory use and construction of a 4-story building with 13 residential units over commercial space and a 13-car garage.	13	6-Jun-13	CPC	Approved w/ conditions	18899
2010.0627 C	2895 SAN BRUNO AVENUE	convert gas station to 5 four story mixed use buildings on 11,250 sqft lot. The project would include new construction of a 5 four-story mixed-use buildings with 10 residential units, 4,230 sq.ft. of retail, and 6,748 sq.ft. of office.	10	17-Jan-13	CPC	Approved w/ conditions	18782
2011.0924 C	2419, 2421 & 2435 LOMBARD ST	Merge 3 lots and convert it to 4 stories condominium bldg. with 12 units and ground floor commercial. Demolition of existing bldgs. on 3 lots (including one -1 story commercial/residential house, one - 2 stories bldg. with first floor commercial and seco...	8	19-Sep-13	CPC	Approved	18968
2012.0680 D	645 -649 DUNCAN STREET	Remodel including interior and exterior work; excavation greater than 20 ft to install new foundation and construct new garage...	5	19-Sep-13	CPC	No DR & approved as proposed	

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Planning Case No.	Address / Project Name	Case Description	No. Units	Approval Date	Body	Action	Action No.
2011.1385 C	651 DOLORES STREET	Convert vacant church into four residential dwelling units. Maintain existing exterior structure historic integrity with minor changes. Convert basement into a garage.	4	12-Dec-13	CPC	Approved w/ conditions	19042
2005.1155 D V	3249 17TH STREET	Project would require a rezoning from RH-2 to NC-3. Proposed project construct a three-story addition to the existing one building on the project site. The new building would be four-story, 50-feet in height consisting of 1,996 sq. ft. ground floor restau...	3	16-May-13	CPC	No DR & approved as proposed	
2012.1523 A	151 LIBERTY ST	Install new garage (excavation required); new vertical and horizontal addition; change in use from single-family to two-family residence.	1	4-Dec-13	HPC	Approved	
2009.1082 C	194 - 194A SWEENEY STREET	CU for creation of sub std lot and open space Variance.	1	26-Sep-13	CPC	Approved w/ conditions	18982
2010.0101 C	658-666 SHOTWELL STREET	Expand residential care facility from 29 to 30 rooms w/in existing building. Construct new single-family residence. Rear Yard and Open Space Variances Required.	1	10-Oct-13	CPC	Approved w/ conditions	19002
2013.0486 C	750 27TH STREET	Conditional Use Authorization request to add a second dwelling unit at the ground level per P.C. Sec. 209.1(f) requiring a Variance to the parking requirements of P.C. Sec. 151.	1	7-Nov-13	CPC	Approved w/ conditions	19015
2011.0053 C V	25 ELGIN PARK STREET	Infill below habitable space within required rear yard to create a new residential unit.	1	12-Sep-13	CPC	Approved w/ conditions	18959
2012.0101 D	427 31ST AV	Demo existing SFD and construct a new 4-story 2-unit building.	1	30-Aug-13	CPC	DR Not Taken-Approved	
2012.1131 D	851 CORBETT AVENUE	Remodel single family home and change it to a 2 unit building with a 2 car garage and new top floor.	1	6-Jun-13	CPC	No DR & Approved	

Source: Planning Department

TABLE A-4.

Major Housing Projects Filed at Planning Department, 2013

Planning Case No.	Address / Project Name	Case Description	Net Units
2013.0208	Seawall Lot 337/Pier 48 (Mission Ro	The proposed project is the development of Seawall Lot 337 and Pier 48 (i.e. Mission Rock), which will include a mixed-use development, including open space, commercial, residential, retail and parking. The project would include approximately 3,600,000 sf...	1500
2013.0973	150 VAN NESS AV	The proposed project is a 13 story, 429 unit residential bldg. on Hayes Street between Van Ness Avenue and Polk Street. The project would contain 512,010 gsf, including 410,760 sf of residential, 90,600 of subsurface parking and 9,000 sf of retail on the...	429
2013.0256	41 TEHAMA ST	The proposed project at 41 Tehama Street would construct a 360-foot tall, 35 story, 402, 217 square-foot building, with 398 dwelling units. The project site is currently a surface parking lot with a one-story, 400 square-foot structure used as a valet parking.	398
2013.1753	1066 MARKET ST	The proposed project is the demolition of existing 2-story commercial building and parking lot and new construction of a 14-story building to house approximately up to 330 residential units, approximately 1,885 sq.ft. of retail on Market Street, approximately...	330
2013.1049	950 MARKET ST	The proposed project is the demolition of five (5) existing structures and new construction of a mixed-use arts, education, residential, hotel, and retail complex, with approximately 198 below-grade parking spaces.	316
2013.0698	1301 - 16TH STREET	The proposed project would involve demolition of an existing one-story warehouse and construction of a new 7-story, residential building. The building would consist of 7 residential levels with 276 units, ground floor parking and mechanical spaces...	276
2013.0677	2070 BRYANT ST	The proposed project is the demolition of the 50,000 sf warehouse building at 2070 Bryant Street and construction of a new 6-story residential building with garage parking using conventional parking and parking stackers. The proposed project would const...	177
2013.0511	1125 MARKET ST	Construction of a 12-story, 100,422 sf bldg containing 164 dwelling units, 3,005 sf of ground-floor retail, and 47 parking spaces.	164
2013.0986	1140 FOLSOM STREET	The proposed project would remove the existing 14, 581 square feet building and parking lot and replace them with a new residential building over commercial. Design high efficiency parking with BMR units on site.	128
2013.0975	888 TENNESSEE ST	The proposed project is the demolition of an existing two-story building and construction of two four-story residential-over-retail building containing 110 dwelling units, 2,155 sq.ft. of retail use, and 10,073 sq.ft. of courtyard open space.	110
2013.0784	2177 3rd Street (aka 590 19th Stree	The proposal is to demolish the two existing industrial/office buildings on the 29,438-square-foot subject lot and construct two 7-story, 68-foot tall residential buildings.	109

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Planning Case No.	Address / Project Name	Case Description	Net Units
2013.1690	1075 MARKET ST	The project sponsor proposes to demolish the existing commercial building (former adult entertainment complex) and replace with a new 8-story mixed use (retail and residential) building with approximately 7,500 sf of retail space, 99 units and 24 parking.	90
2013.0220	815 - 825 TENNESSEE STREET	Demolition of the two-story 815-825 Tennessee buildings, retaining the brick facade on the corner of Tennessee & 19th Streets (listed as a known historic resource in the Central Waterfront Survey) and construction of a new 6-story apartment building,	88
2013.0227	2101 & 2155 Webster Street	The proposed project is to renovate an existing office building and dental school into 66 dwelling units. Additionally, the proposed project would construct 11 dwelling units (townhouses) in four buildings on the existing surface parking lot,	77
2013.0485	750 HARRISON ST	The proposed project would involve demolition of existing one-story commercial building (constructed in 1954) and construction of a new eight-story, residential building. The proposed building would consist of seven residential levels with 77 units.	77
2013.1281	1335 -1339 FOLSOM ST	The proposed project would involve demolition of an existing one-story commercial building (constructed in 1923) and construction of a new seven-story, residential building of approximately 65' in height.	65
2013.0312	777 TENNESSEE STREET	The proposed project would involve the demolition of an existing two-story light industrial building and construction of a new multi-family building. The proposed new building would include 59 residential units over below grade parking.	59
2013.1179	1700 MARKET ST	The proposed project would remove an existing 2-story frame building and construct a new 7-story concrete building with 42 rooms for Group Housing and ground floor retail. Each room will have limited kitchen facilities. No off-street parking is proposed.	42
2013.0321	901 TENNESSEE STREET	The proposed project would include demolition of an existing one-story warehouse and construction of a new four-story, residential building. The building shall consist of four residential levels with 39 units, over basement level with parking,	39
2013.0531	2230 3RD STREET	The proposed project would result in the demolition of an existing commercial warehouse building (Tire Dealer) and construct a new 7-story mixed-use commercial and residential building with ground floor commercial/residential flex space,	37
2013.1005	22 FRANKLIN ST	Demolish the existing auto body shop building on the lot 012 and construct a 8-story, 85-foot tall mixed use building. Construct a new building would include 24 dwelling units and 2,120 gross square feet of retail space along Franklin.	28
2013.0614	600 SOUTH VAN NESS AV	The proposed project would construct a 5-story mixed use building with residential above retail and private garage. The project would involve demolition of existing an single story auto motive repair structure.	27

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Planning Case No.	Address / Project Name	Case Description	Net Units
2013.0124	1450 15TH ST	The proposed project would demolish an existing 6,088 sq. vacant industrial building on irregular "L" shaped parcel and construct a new multi-family residential structure with 23 dwelling units. The project would also include 16 off-street parking space,	23
2013.0318	233-237 SHIPLEY ST	New construction of a 4-story residential building with approximately 22 single occupancy residence. No automobile parking. Bicycle parking to be included.	22
2013.0491	1335 LARKIN ST	Preserve facade of know Historic Resource and construct 5 stories of residential over parking behind Historic facade.	20
2013.1305	1532 HOWARD ST	Demolition of an existing one-story commercial building and the proposed new construction of a six-story residential building with 15 single room occupancy units.	15
2013.0431	750 14TH ST	The proposed project would remodel and add an addition to an existing 10 unit apartment building/church. The project would result in an addition of 9 new apartment units, including adding a 2 story addition in rear, not visible from street.	10

Source: Planning Department

TABLE A-5.
Major Projects
Authorized for
Construction by
DBI, 2013

Address	Units	Construction Type	Authorization Date
280 BEALE ST	479	New Construction	28-Aug-13
399 FREMONT ST	452	New Construction	14-Jun-13
360 FREMONT ST	384	New Construction	8-Nov-13
690 LONG BRIDGE ST	273	New Construction	19-Feb-13
218 BUCHANAN ST	191	New Construction	2-Aug-13
1420 MISSION ST	190	New Construction	22-May-13
420 LAGUNA ST	182	New Construction	5-Apr-13
104 09TH ST	160	New Construction	29-Aug-13
1415 MISSION ST	121	New Construction	22-Jul-13
100 BUCHANAN ST	116	New Construction	2-Aug-13
2175 MARKET ST	88	New Construction	17-Apr-13
2655 BUSH ST	81	New Construction	18-Jun-13
181 FREMONT ST	74	New Construction	26-Dec-13
1100 OCEAN AV	71	New Construction	21-Feb-13
388 FULTON ST	69	New Construction	26-Nov-13
870 HARRISON ST	26	New Construction	2-Apr-13
899 VALENCIA ST	18	New Construction	26-Apr-13
1050 VALENCIA ST	12	New Construction	17-Jul-13
2421 16TH ST	12	New Construction	17-Jul-13
1785 15TH ST	8	New Construction	18-Dec-13
1531 JONES ST	6	Expansion	10-Oct-13

Source: Planning Department

TABLE A-6.
Major Affordable Projects in the Pipeline as of December 31, 2013

Address / Project Name	Very Low Income Homeless or Single	Very Low Income Seniors	Very Low Income Families	Very Low Income Disabled	Lower Income	Homeowner Low to Moderate Income	Homeowner Moderate Income	Total Affordable Units	Total Units	Development Type
Complete										
472 Ellis St / Arlington Preservation Mercy Housing	153							153	154	Rehabilitation
701-725 Golden Gate Ave Central Fwy Parcel C	20	79						99	100	New Construction
112 Middle Point Rd SFHA / Hunters View Phase I			106					106	107	Rehabilitation
150 Olis St CCDC	75							75	76	New Construction
"535 Folsom St at Essex St Transbay Block 11"	120							120	120	Rehabilitation
"474 Natoma St / Natoma Court Bridge Housing"			60					60	60	New Construction
"1075 Le Conte Supportive Housing Providence Baptist"	73							73	73	New Construction
1301 Divisadero St (Inclusionary)							4	4	32	New Construction
SUBTOTALS	441	79	166	0	0	0	4	690	722	
Currently Under Construction										
121 Golden Gate Ave / St Anthony Senior Housing / Mercy Housing	18	71						89	90	New Construction
1180 Fourth St Mercy Housing	25		124					149	150	New Construction
72 Townsend St (Inclusionary)						7		7	74	New Construction
1450 Franklin (Inclusionary)						9		9	67	New Construction
1100 Ocean Ave Phelan Loop Family Housing	25		45					70	70	New Construction

CONTINUED >

Address / Project Name	Very Low Income Homeless or Single	Very Low Income Seniors	Very Low Income Families	Very Low Income Disabled	Lower Income	Homeowner Low to Moderate Income	Homeowner Moderate Income	Total Affordable Units	Total Units	Development Type
285 Broadway Chinatown Community Development Center	18		56					74	75	New Construction
Hunters Point Shipyard Block 50						3		3	25	New Construction
Hunters Point Shipyard Block 51						7		7	63	New Construction
SUBTOTALS	86	71	225	0	0	26	0	408	614	
In Pre-Construction Phase										
5800 Third St (Inclusionary) Holiday Development							30	30	206	New Construction
1239 Turk St / Rosa Parks II SFHA / TNDC	20	78						98	98	New Construction
909 Howard St Family Apartments TNDC			60					60	172	New Construction
1036 Mission St TNDC	20		80					100	100	New Construction
1500 Page St Agesong / Pacific Institute				16				16	17	Rehabilitation
238 Taylor St / 168-186 Eddy St TNDC	30		123					153	153	New Construction
Mission Bay South Block 7W / China Basin / 4th Street / Related CA					198			198	200	New Construction
Carroll Avenue Senior Housing 5800 3rd Street / Lot 3	25	95						120	121	New Construction
800 Presidio / Booker T Washington	24		25					49	50	New Construction
Transbay Block 6 & 7 / Folsom & Beale / Mercy Housing			145					145	147	New Construction
55 Laguna Senior HUD 202		70						70	70	New Construction
200 Sixth St Hugo Hotel			52	14				66	67	New Construction
207 Cameron Wy / Alice Griffith Ph 1-3 SFHA / McCormack Baron Salazar / Lennar			303					303	306	New Construction
Hunters View HOPE SF Phase II / SFHA / The John Stewart Company			180					180	182	New Construction

CONTINUED >

Address / Project Name	Very Low Income Homeless or Single	Very Low Income Seniors	Very Low Income Families	Very Low Income Disabled	Lower Income	Homeowner Low to Moderate Income	Homeowner Moderate Income	Total Affordable Units	Total Units	Development Type
Hunters Point Shipyard Block 53								10	93	New Construction
Hunters Point Shipyard Block 54								5	48	New Construction
Hunters Point Shipyard Block 49			59					59	60	New Construction
Hunters Point Shipyard Block 56/57						10		10	98	New Construction
Mission Bay North Block N4P3							45	45	129	New Construction
SUBTOTALS	119	243	1,027	30	198	10	75	1,717	2,317	
In Preliminary Planning										
Hunters View HOPE SF Phase III SFHA / The John Stewart Company			62					62	63	New Construction
207 Cameron Wy / Alice Griffith Ph 4-5 SFHA / McCormack Baron Salazar / Lennar			197					197	198	New Construction
1400 Mission St (Inclusionary) TNDC / Maracor								190	190	New Construction
455 Fell St Central Fwy Parcel O			80					80	80	New Construction
102-104 Octavia Blvd Central Fwy Parcel U	35							35	35	New Construction
400 Folsom St at Fremont St Transbay Block 8								174	175	New Construction
270 Spear St Transbay Block 1								143	144	New Construction
Transbay Block 9			113					113	114	New Construction
1654 Sunnydale Ave, HOPE SF SFHA / Mercy Housing			306		700			1,006	1,700	New Construction
1095 Connecticut St / 751 Missouri St Potrero Terrace & Potrero Annex SFHA / Bridge Housing	606	90	286				30	896	962	New Construction
601 China Basin St Mission Bay South Parcel 6 East			134					134	135	New Construction

CONTINUED >

Address / Project Name	Very Low Income Homeless or Single	Very Low Income Seniors	Very Low Income Families	Very Low Income Disabled	Lower Income	Homeowner Low to Moderate Income	Homeowner Moderate Income	Total Affordable Units	Total Units	Development Type
550 Mission Rock St Mission Bay South Parcel 3 East	99							99	100	New Construction
3001 24th Street / Casa de la Mission		35						35	35	New Construction
Hunters Point Shipyard Block 1						25		25	240	New Construction
Hunters Point Shipyard Block 52						7		7	70	New Construction
Hunters Point Shipyard Block 55						7		7	66	New Construction
SUBTOTALS	740	125	1,178	0	700	39	30	3,143	4,307	
TOTALS	1,085	518	2,596	30	898	75	109	5,660	7,662	

Source: Mayor's Office of Housing, Office of Community Investment and Infrastructure San Francisco Redevelopment Agency

Notes: SFHA = San Francisco Housing Authority; TNDC = Tenderloin Neighborhood Development Corporation; CHP = Catholic Healthcare Partners; BHNC = Bernal Heights Neighborhood Center

TABLE B-1.
Housing Trends by Planning Area, 2013

Planning Area	Units Authorized for Construction	Units Completed from New Construction	Units Demolished	Units Gained or Lost from Alterations	Net Change In Number of Units
Balboa Park	71	-	-	1	1
Central Waterfront	1	16	-	-	16
East SoMa	2	36	-	48	84
Market-Octavia	650	371	-	9	380
Mission	68	245	(1)	13	259
Showplace Square/ Potrero Hill	11	-	(1)	2	3
West SoMa	28	-	-	(12)	(12)
Rest of City	2,337	1,662	431	(2)	1,229
San Francisco	3,168	2,330	429	59	1,960

Source: Planning Department

Note: Net Change equals Units Completed less Units Demolished plus Units Gained or (Lost) from Alterations.

TABLE B-2.
Units Entitled by Planning Area, 2013

Planning Area	No. of Projects	Units Entitled
Balboa Park	1	13
East SoMa	1	2
Market-Octavia	5	180
Mission	7	207
Showplace Square/ Potrero Hill	2	821
West SoMa	1	4
Rest of City	28	1,325
San Francisco	45	2,552

Source: Planning Department

TABLE B-3.
Housing Units Added by Building Type and Planning Area, 2013

Planning Area	Single Family	2 Units	3 to 9 Units	10 to 19 Units	20+ Units	Total
Balboa Park	1	-	-	-	-	1
Central Waterfront	-	-	-	16	-	16
East SoMa	-	-	4	13	67	84
Market-Octavia	1	-	4	18	357	380
Mission	(1)	-	19	17	222	257
Showplace Square/ Potrero Hill	(1)	(1)	2	-	-	--
West SoMa	1	(1)	1	(13)	-	(12)
Rest of City	12	(42)	59	66	1,139	1,234
San Francisco	13	(44)	89	117	1,785	1,960

Source: Planning Department

TABLE B-4.
Units Demolished by Building Type and Planning Area, 2013

Planning Area	Buildings	Units by Building Type				Total
		Single	2 Units	3 to 4 Units	5+ Units	
Mission	1	1	-	-	-	1
Showplace Square/ Potrero Hill	1	1	-	-	-	1
Rest of City	9	9	-	-	418	427
San Francisco	11	11	---	---	418	429

Source: Planning Department

TABLE B-5.

Units Lost Through Alterations and Demolitions by Planning Area, 2013

Planning Area	Alterations					Units Demolished	Total Units Lost
	Illegal Units Removed	Units Merged into Larger Units	Correction to Official Records	Units Converted	Total Alterations		
Market-Octavia	1	-	-	-	1	-	1
Mission	-	-	-	-	-	1	1
Showplace Square/ Potrero Hill	-	-	1	-	1	1	2
West SoMa	-	13	1	-	14	-	14
Rest of City	69	25	-	-	94	427	521
San Francisco	70	38	2	---	110	429	539

Source: Planning Department

TABLE B-6.

New Affordable Housing Constructed in Planning Areas, 2013

Planning Area	Affordable Units	Total Units	AMI Target	Tenure	Funding Source
Central Waterfront					
616 20th Street	2	16	Moderate	Ownership	Inclusionary
East SoMa					
374 5th Street	44	44	-	Rental	
537 Natoma Street	1	13	Moderate	Ownership	Inclusionary
Market-Octavia					
701 Golden Gate Avenue	100	100	VLI	Rental	CTCAC, OCII, FHLB, NeighborWorks
1844 Market Street	14	113	LI	Rental	Inclusionary
Planning Area					
401 Grove Street	9	63	Moderate	Ownership	Inclusionary
200 Dolores Street	2	10	Moderate	Ownership	Inclusionary
40 Elgin Park	1	1	Moderate	Ownership	Inclusionary
55 Dolores Street	1	1	Moderate	Ownership	Inclusionary
Mission					
1880 Mission Street	40	202	LI	Rental	Inclusionary
817 York Street	1	1	Moderate	Ownership	Inclusionary

CONTINUED >

Planning Area	Affordable Units	Total Units	AMI Target	Tenure	Funding Source
915 Florida Street	1	1	Moderate	Ownership	Inclusionary
926 Shotwell Street	1	1	Moderate	Ownership	Inclusionary
Showplace Square					
1022 Rhode Island Street	1	1	Moderate	Ownership	Inclusionary
San Francisco	652	1,900	--	--	--

Source: Planning Department

TABLE C.
San Francisco Zoning Districts, as of 2013

Zoning	General Descriptions
Residential, House and Mixed Districts	
RH-1	Residential, House – One Family
RH-1(D)	Residential, House – One Family (Detached Dwellings)
RH-1(S)	Residential, House – One Family with Minor Second Unit
RH-2	Residential, House – Two Family
RH-3	Residential, House – Three Family
RM-1	Residential, Mixed – Low Density
RM-2	Residential, Mixed – Moderate Density
RM-3	Residential, Mixed – Medium Density
RM-4	Residential, Mixed – High Density
Residential Transit-Oriented Districts	
RTO	Residential Transit-Oriented
RTO-M	Residential Transit-Oriented, Mission
Residential-Commercial Districts	
RC-3	Residential-Commercial – Medium Density
RC-4	Residential-Commercial – High Density
Public District	
P	Public District
Neighborhood Commercial Districts	
NC-1	Neighborhood Commercial Cluster District
NC-2	Small-Scale Neighborhood Commercial District
NC-3	Moderate-Scale Neighborhood Commercial District
NC-S	Neighborhood Commercial Shopping Center District
NCD-24th-Noe	24th - Noe Valley Neighborhood Commercial District
NCD-Broadway	Broadway Neighborhood Commercial District
NCD-Castro	Castro Neighborhood Commercial District
NCD-Haight	Haight Neighborhood Commercial District
NCD-Inner Clement	Inner Clement Neighborhood Commercial District
NCD-Inner Sunset	Inner Sunset Neighborhood Commercial District
NCD-North Beach	North Beach Neighborhood Commercial District
NCD-Outer Clement	Outer Clement Neighborhood Commercial District
NCD-Pacific	Pacific Neighborhood Commercial District
NCD-Polk	Polk Neighborhood Commercial District
NCD-Sacramento	Sacramento Neighborhood Commercial District
NCD-Union	Union Neighborhood Commercial District
NCD-Upper Fillmore	Upper Fillmore Neighborhood Commercial District
NCD-Upper Market	Upper Market Neighborhood Commercial District

CONTINUED >

Zoning	General Descriptions
NCD-West Portal	West Portal Neighborhood Commercial District
Neighborhood Commercial Transit Districts	
NCT-1	Neighborhood Commercial Transit Cluster District
NCT-2	Small-Scale Neighborhood Commercial Transit District
NCT-3	Moderate-Scale Neighborhood Commercial Transit District
NCT-24th-Mission	24th - Mission Neighborhood Commercial Transit District
NCT-Hayes-Gough	Hayes - Gough Neighborhood Commercial Transit District
NCT-Mission	Mission Neighborhood Commercial Transit District
NCT-Ocean	Ocean Neighborhood Commercial Transit District
NCT-SoMa	South of Market Neighborhood Commercial Transit District
NCT-Upper Market	Upper Market Neighborhood Commercial Transit District
NCT-Valencia	Valencia Neighborhood Commercial Transit District
Chinatown Mixed Use Districts	
CRNC	Chinatown Residential Neighborhood Commercial District
CVR	Chinatown Visitor Retail District
CCB	Chinatown Community Business District
South of Market Mixed Use Districts	
RED	South of Market Residential Enclave District
RSD	South of Market Residential Service District
SLI	South of Market Service-Light Industrial District
SLR	South of Market Light Industrial-Residential District
SSO	South of Market Service / Secondary Office District
Eastern Neighborhoods Mixed Use Districts	
MUG	Mixed Use - General District
MUO	Mixed Use - Office District
MUR	Mixed Use - Residential District
SPD	South Park Mixed Use District
UMU	Urban Mixed Use District
Downtown Residential Districts	
DTR-RH	Downtown Residential - Rincon Hill District
DTR-SB	Downtown Residential - South Beach District
DTR-TB	Downtown Residential - Transbay District
Commercial Districts	
C-2	Community Business District

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Zoning	General Descriptions
Downtown Commercial Districts	
C-3-S	Downtown Commercial - Service District
C-3-G	Downtown Commercial - General District
C-3-R	Downtown Commercial - Retail District
C-3-O	Downtown Commercial - Office District
C-3-O(SD)	Downtown Commercial - Office (Special Development) District
Industrial Districts	
M-1	Light Industrial District
M-2	Heavy Industrial District
C-M	Heavy Commercial District
PDR-1-B	Production Distribution and Repair Light Industrial Buffer District
PDR-1-G	Production Distribution and Repair General District
PDR-1-D	Production Distribution and Repair Design District
PDR-2	Core Production Distribution and Repair District
Redevelopment Agency Districts	
MB-OS	Mission Bay, Open Space
MB-O	Mission Bay, Office
MB-RA	Mission Bay Redevelopment Area Plan District
HP-RA	Bayview Hunters Point Redevelopment Area Plan District

Source: Planning Department

TABLE D.
In-Lieu Housing Fees Collected, Fiscal Years 2004-2013

Fiscal Year	Amount Collected
2004	\$134,875
2005	\$2,623,279
2006	\$19,225,864
2007	\$7,514,243
2008	\$43,330,087
2009	\$1,404,079
2010	\$992,866
2011	\$1,173,628
2012	\$1,536,683
2013	\$9,130,671
TOTAL	\$87,066,275

Source: Planning Department

APPENDIX E.

Glossary

Affordable Housing Unit: A housing unit – owned or rented – at a price affordable to low- and middle-income households. An affordable rental unit is one for which rent equals 30% of the income of a household with an income at or below 80% of the HUD median income for the San Francisco PMSA, utilities included. An affordable ownership unit is one for which the mortgage payments, PMI, property taxes, homeowners dues, and insurance equal 33% of the gross monthly income of a household earning between 80% and 120% of the San Francisco PMSA median income, assuming a 10% down payment and a 30-year, 8% fixed-rate loan.

Alterations: Improvements and enhancements to an existing building. At DBI, building permit applications for alterations use Forms 3 and 8. If you are not demolishing an existing building (Form 6) or newly constructing a new building (Forms 1 and 2), you are “altering” the building.

Certificate of Final Completion (CFC): A document issued by DBI that attests that a building is safe and sound for human occupancy.

Conditional Use Permit: A permit that is only granted with the consent of the Planning Commission, and not as of right.

Condominium: A building or complex in which units of property, such as apartments, are owned by individuals and common parts of the property, such as the grounds and building structure, are owned jointly by all of the unit owners.

Current dollars: The dollar amount for a given period or year not adjusted for inflation. In the case of income, it is the income amount in the year in which a person or household receives it. For example, the income someone received in 1989 unadjusted for inflation is in current dollars.

General Plan: Collection of Objectives, Policies, and Guidelines to direct guide the orderly and prudent use of land.

HMFA: HUD Metro FMR (Fair Market Rent) Area an urbanized county or set of counties with strong social and economic ties to neighboring communities. PMSAs are identified within areas of one million-plus populations.

Housing Unit: A dwelling unit that can be a single family home, a unit in a multi-unit building or complex, or a unit in a residential hotel.

Inclusionary Housing Units: Housing units made affordable to lower- and moderate-income households as a result of legislation or policy requiring market rate developers to include or set aside a percentage (usually 10% to 20%) of the total housing development to be sold or rented at below market rates (BMR). In San Francisco, this is usually 15%, and it applies to most newly constructed housing developments containing five or more dwelling units.

Median Income: The median divides the household income distribution into two equal parts: one-half of the households falling below the median household income and one-half above the median.

Pipeline: All pending development projects -- filed, approved or under construction. Projects are considered to be “in the pipeline” from the day they are submitted for review with the Planning Department, the Redevelopment Agency (SFRA), or the Department of Building Inspections (DBI), until the day the project is issued a Certificate of Final Completion by DBI.

Planning Code: A local law prescribing how and for what purpose each parcel of land in a community may be used.

Primary Metropolitan Statistical Area (PMSA): A PMSA is an urbanized county or set of counties with strong social and economic ties to neighboring communities. PMSAs are identified within areas of one million-plus populations.

Single Room Occupancy (SRO) Units: Residential hotel rooms, typically occupied by one person, lacking bathroom and/or kitchen facilities.

Temporary Certificate of Occupancy (TCO): Like a CFC, a TCO allows occupancy of a building pending final inspection.

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