



# San Francisco Family Zoning Plan

**HOUSING ELEMENT REZONING**



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Planning**

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**PLANNING COMMISSION  
INFORMATIONAL & GENERAL  
PLAN AMENDMENT INITIATION  
JULY 17, 2025**

## TODAY'S PRESENTATION

- Timeline of introduced Family Zoning Plan Legislation
- Affordable Housing Sites Analysis and Strategies (AHSAS)
- Infrastructure Planning
- General Plan Amendment: Initiation
- Next Steps



*“We want a city with more families, more workers, more dreamers. We want to build housing for the next generation of San Franciscans so **kids who grow up here can have the same opportunity to raise their own children in this beautiful and special place.**”*

*Mayor Daniel Lurie, SF Chronicle (4/3/25)*



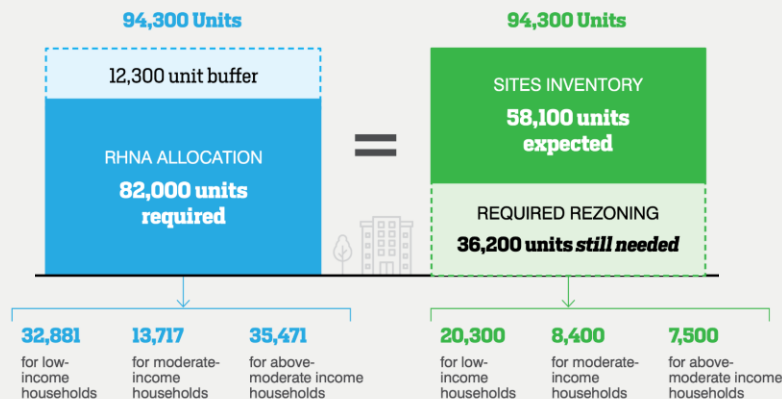


# San Francisco's obligations under state law

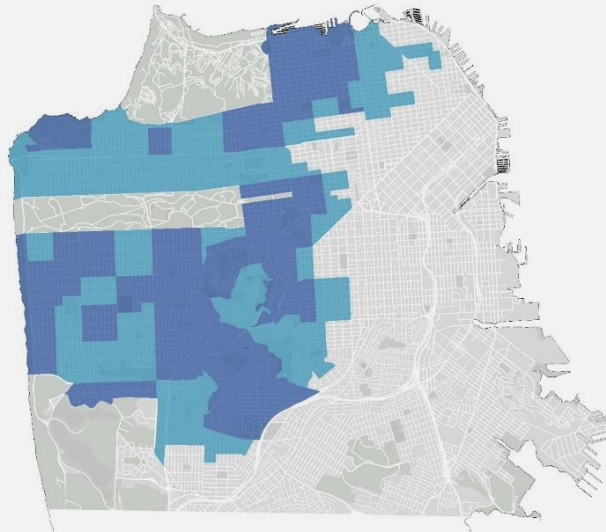
By January 31, 2026 we must:

- Rezone to create **realistic capacity** to meet our **shortfall of 36,200 units**.
- **Affirmatively Further Fair Housing (AFFH)** by rezoning in high opportunity neighborhoods.
- **Identify sites suitable for low-income housing** and allow projects on such sites to be approved ministerially if they exceed 20% affordable onsite.

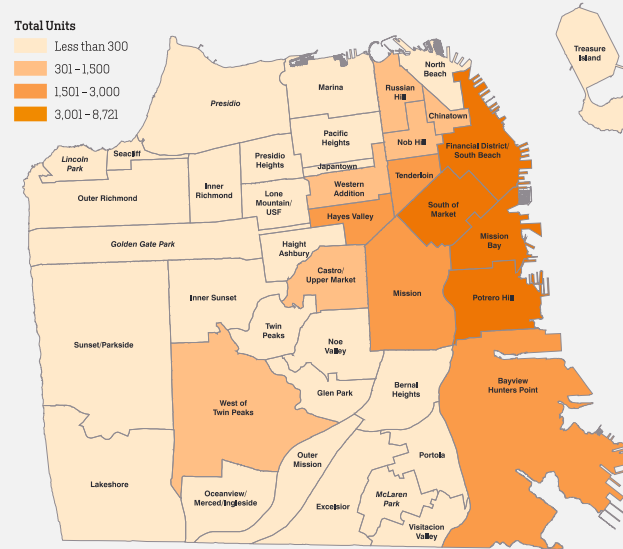
*SF's Regional Housing Needs Allocation (RHNA)*



***San Francisco's Family Zoning Plan*** fulfills state laws by planning for affordable and mixed-income housing to overcome historic patterns of exclusion and segregation.



**Housing Opportunity Areas\***



**Housing Production (2005-2019)**

***Only 10% of  
affordable and mixed-  
income housing has  
been built in “housing  
opportunity areas,”  
covering over 50% of  
the city.***

\*Areas designated “Highest Resource” and “High Resource” on the Opportunity Area Map (CA Dept of Housing & Community Development)

**Introduced June 24, 2025**

## Zoning Map Ordinance [250700]

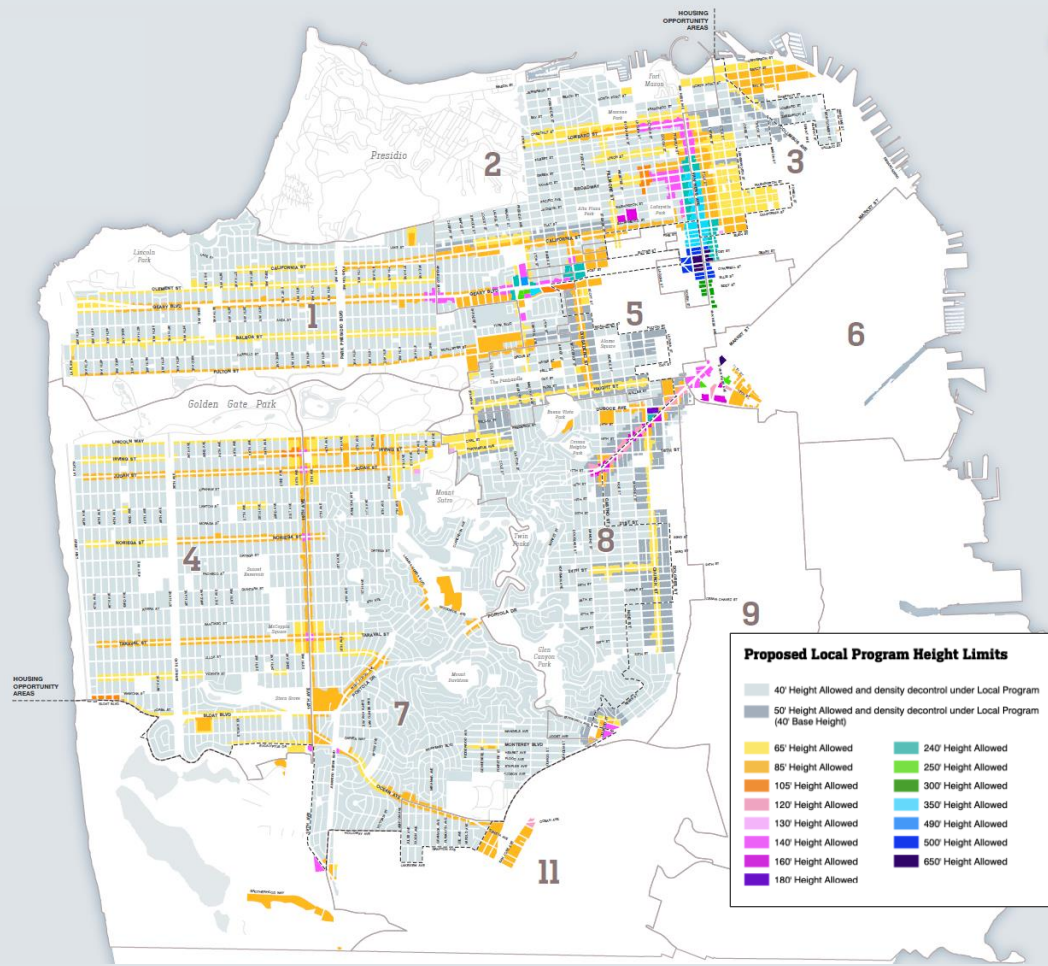
- Establishes **zoning structure**: Base Heights, Local Program Heights, Zoning District Classification, and SFMTA Special Use District.

## Planning Code Ordinance [250701]

- Establishes **zoning standards to regulate the design and uses of new developments**; Creates the Housing Choice-SF Program (“Local Program”).

**For consideration of Initiation at today's hearing:**

## General Plan Amendments



# Legislation Timeline

- **June 24<sup>th</sup>:** Mayor's Legislation introduced
- **July 17<sup>th</sup>:** Planning Commission – General Plan Amendment Initiation
- **September 11<sup>th</sup>:** Planning Commission – Adoption
  - 20-day notification period begins August 22nd
  - 90-day CPC Review ends September 22nd
- **October to November:** Board of Supervisors Adoption
  - Land Use & Transportation Committee, then Full Board
- **January 31, 2026:** State deadline for adoption
- **Note:** *Tenant Protections Ordinance will be introduced separately with the intention of concurrent adoption with rezoning at the Board of Supervisors*



# Legislation Overview

## For a high-level overview of the ordinances:

- **June 26, 2025** Informational Hearing Memo and Presentation
- **Legislative Digests** by the City Attorney's Office

Figure 5: Summary of Base Zoning Amendments

| Topic   | Key Provisions   | Applicable Geography  |
|---------|--|---|
| Density | <b>Establish maximum unit sizes, applicable to NEW construction.</b><br>New units may be up to 4,000sf – OR – floor area ratio of 1.2:1 (whichever is greater).<br><br><b>Exceptions:</b><br>5 – 9 unit building: allows one unit greater than 4,000 sf<br>10+ unit building: 10% of units may be greater than 4,000 sf<br><br><b>Purpose:</b> To encourage the development of multifamily housing in well-resourced areas, while allowing some larger units in new multi-family buildings to support project feasibility.   | Citywide  |
|         | <b>Establish minimum residential densities within ½ mile of fixed guideway transit stops and stations</b> (expressed in dwelling units per acre) <sup>4</sup> <b>and on certain Housing Element sites</b><br><br>Similarly, establish <b>minimum intensities for projects that provide non-residential uses, namely office buildings.</b><br><br><b>Purpose:</b> to require efficient use of land, meet specific policy and statutory requirements ( <b>Metropolitan Transportation Commission</b> [MTC] Policy and Housing Element law), and discourage or prevent demolition of single-family homes being replaced with new single-family homes. | Within 1/2 mile of transit hubs and on sites identified as appropriate for Very Low Income or Low Income in the Housing Element Sites Inventory                         |
|         | <b>Establish Form-Based zoning (aka “density decontrol”) in various areas:</b> <ul style="list-style-type: none"> <li>On the main commercial and transit streets proposed for rezoning, density limits would be removed, including in: <ul style="list-style-type: none"> <li>NC districts (NC-1, NC-2, NC-3, NC-S, named NC’s), RC and C-2 districts within the Housing Opportunity Areas.</li> <li>Properties on some corridors that will be rezoned to</li> </ul> </li> </ul>   | Rezoned properties in Housing Opportunity Areas (HOAs)<br><br>New Residential Transit Oriented-Commercial (RTO-C) zoning will be established on portions of transit and |

<sup>3</sup> MTC Resolution No. 4530

<sup>4</sup> Administrative Guidance for MTC’s Transit-Oriented Communities Policy Version 1.1 - May 2025

Figure 6: Local Program Development Benefits (Modified Standards)

| Topic  | Applicable Planning Code or Design Standard (Under Current Zoning)   | Local Program “Automatic” flexibility (“waivers” for projects in Local Program)  |
|--|--|--|
| Density  | Generally, parcels off-corridor and some parcels on corridors are subject to density limits based on lot size.   | Projects using the Local Program, including off-corridor sites, would not be subject to lot-based density limits but rather to Form-Based Density standards.   |
| Height   | Projects are subject to the height limit (i.e. “base” height limit). Eligible projects using State Density Bonus or other programs may exceed the height limit per the rules of those programs.  | Projects may extend up to the Local Program Height Limit as provided on the Proposed Zoning Map.<br><br>Corner lots and lots larger than 8,000 square feet may go up to 65’.<br><br>Projects may receive up to a 5’ height increase to accommodate key architectural features, such as stoops and entries.   |
| Inclusionary Housing                                     | Projects may meet inclusionary housing requirements through a combination of: <ul style="list-style-type: none"> <li>Affordable Housing Fee;</li> <li>On-site Affordable Housing;</li> <li>Off-site Affordable Housing;</li> <li>Small Sites;</li> <li>Land Dedication (currently available in select districts)</li> </ul> Projects using state density and ministerial review programs must meet applicable requirements, which typically require that some or all inclusionary units be provided on-site. | Projects can choose any compliance method or some combination thereof to meet Section 415. Projects that elect off-site or land-dedication must provide the required units or land within the geography of the Housing Opportunity Areas.<br><br>Projects of 24 units or less also have the option of providing a 100% rent-controlled building instead of providing inclusionary units. |
| Height Bonus for Community Serving Uses and Micro-Retail | None   | Projects may receive a square footage bonus for providing specific uses, which may be accommodated by adding up to 10’ additional height: <ul style="list-style-type: none"> <li>Up to 2 additional feet of building square footage for every square foot provided of Community Serving uses (childcare, Legacy Business, displaced business grocery, laundromat, nonprofit</li> </ul>   |



# Affordable Housing Sites Analysis and Strategies

## Topics We'll Cover Today

- Project Purpose and Context
- Research and Analysis:
  - Pipeline and Parcel Analysis
  - Policy and Financial Research
- Key Policy Areas and Initial Findings



# Affordable Housing Leadership Council Report

**Funding and cost lowering are key to produce and preserve affordable housing.**

The **Affordable Housing Leadership Council Report** (Spring 2024) addresses **funding, financing, and costs** for affordable development.

- **Increase** Federal, State, and regional **funding**.
- **Expand** San Francisco's **capacity** and **coordination** to fund affordable housing.
- **Innovation** and **alternative approaches** to delivering affordable housing.



## **Affordable Housing Funding and Financing Recommendations Report**

**FEBRUARY 2024**

Recommendations from the Affordable Housing Leadership Council convened as part of implementation of San Francisco's 2022 Housing Element Update

Report prepared by Staff of the San Francisco Mayor's Office of Housing and Community Development, San Francisco Planning Department, and Enterprise Community Partners



Mayor's Office of  
Housing and Community  
Development

**San Francisco**  
Planning

**Enterprise**

# Affordable Housing **Sites Analysis and Strategies Overview**

**The Affordable Housing Sites Analysis and Strategies (AHSAS)** will inform how the City and affordable housing developers can **acquire and develop sites for 100% affordable housing projects**, organized around three goals:

- Effectively **manage the existing pipeline** of affordable housing
- Use both **strategic and opportunistic approaches** to identify and acquire new sites for affordable housing development
- Ensure **ongoing affordable housing production** along with equitable geographic distribution of affordable housing

# 100% Affordable Sites (AHSAS): Relationship to Rezoning

## HOUSING ELEMENT REZONING

### REZONED SITES (overall)

- Required to meet Housing Element (e.g., RHNA) at all income levels.
- Primarily located in **Well-Resourced Neighborhoods** to meet AFFH goals.

- Subset of rezoned sites; required to meet **lower income** portions of RHNA.
- Must meet **minimum size and density** requirements.
- Projects proposing >20% BMR are eligible for **ministerial approval**

### LOW-INCOME SITES

## 100% AFFORDABLE SITES

- Sites meeting **MOHCD suitability criteria**, including competitiveness w/state & federal funding.
- **Located citywide**; overlaps with rezoning & low-income sites
- **Rezoning will enable additional parcels** to meet criteria.



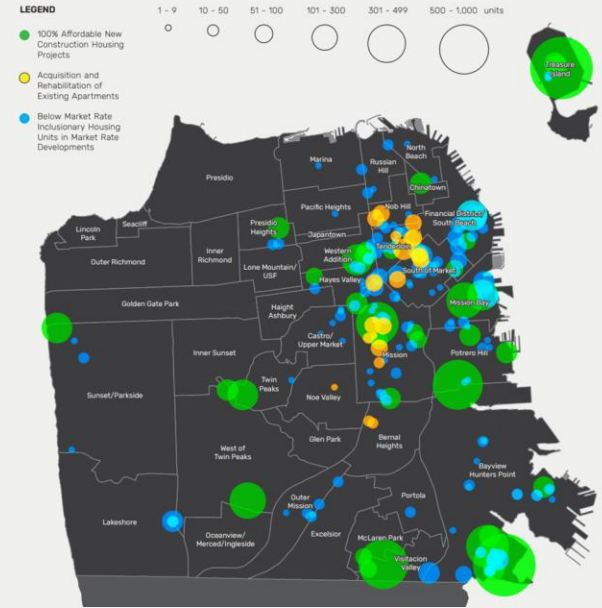


# Affordable Housing Pipeline Analysis

**Focus:** Status and location of the pipeline of affordable housing developments

## Primary Findings:

- **Prospective sites & pre-construction phase:** 12,600+ units across 59 developments
- **Under Construction:** 2,299 affordable units across 30 projects (13 new 100% developments and 17 rehabilitation projects)
- **Inclusionary BMR Units:** 2,500+ affordable units across 124 projects; delayed by feasibility
- **Geography:** Affordable Housing pipeline **mirrors the market-rate pipeline** with most projects in equity geographies.
- **Significant funding gap holds back the completion of existing pipeline**



# Affordable Housing Pipeline Overview

**Community Request:** Transparent and accessible resource to understand the existing Affordable Housing Pipeline.

## Deliverable:

- Offers a **visual summary of SF's Affordable Housing Pipeline** to inform community members and decision makers
- Explains **how affordable housing is funded and developed** and **who it serves**
- Provides details on **project location, unit count, and phase**



# Affordable Housing **Site Suitability Analysis**

**Analysis:** **Identify potential affordable housing sites across the city** based on policy (local and state laws), site characteristics, and development potential

**Criteria:** MOHCD and affordable developers prefer 100+ units on 8,000+ sq ft. for efficiency

## **Draft Findings:**

- There are **over 1,200 sites (8,000+ sq ft)** that may be suitable for affordable housing with capacity of over **148,000 units**.
  - Merging smaller adjacent lots yields an additional 98,000 units, but faces acquisition challenges
- Viable sites (particularly public and religious sites) are distributed unevenly throughout the city
- Analysis excludes existing residential units and various public sites

# Affordable Housing **Policy and Financial Research and Analysis**

## Research Focus Areas for Policy and Financial Analysis :

- **Best Practices from Other Cities:** Strategies for managing affordable housing pipelines, acquiring land, and leveraging partnerships across public, nonprofit, & faith-based sectors.
- **Land Cost & Rezoning Analysis:** How land prices impact development costs and the effect of rezoning on land costs in San Francisco.
- **Holding Costs and Financial Mechanisms for Acquisition:** Land holding and interim use costs; recommended financial structures for acquiring and developing sites.

**Stakeholder Input:** Incorporated ideas from 2024 focus groups with affordable housing developers and advocates into initial findings and ongoing strategy development.



# Affordable Housing **Emerging Policies and Strategies**

- **Managing the pipeline** of housing development and site acquisition
- **Expanding the geography** of affordable housing
- **Public sites and faith- and nonprofit-owned sites** for affordable housing
- **Strategic market practices** for site acquisition
- **Expanding opportunities for "missing middle"** affordable housing types.

# Affordable Housing **Emerging Policies and Strategies**

## ▪ **Managing the pipeline of affordable housing development and site acquisition**

- 12K units in pipeline could take 10+ years at current rate of funding and building, includes key commitments like HOPE SF
- Development costs increased over 5+ years, while land costs have been relatively stable
- City needs to align growth of the pipeline to funding available to build projects

## ▪ **Expanding the geography of affordable housing**

- **Existing pipeline concentrated in Equity Geographies**, like most new housing, where zoning allows for more density.
- The City can **strategically grow the affordable housing pipeline** to fill geographic gaps by targeting site acquisition and use of public, religious, and nonprofit land.

# Affordable Housing Emerging Policies and Strategies

- **Public sites and faith- and nonprofit-owned sites for affordable housing**
  - **Housing is priority on public land**, balanced w/ agencies' operational & financial needs
  - Philanthropy, nonprofits, and City are investing in **capacity building for religious and nonprofit sites.**
- **Strategic market practices for site acquisition**
  - During economic down cycles, few landowners are motivated to sell at a discount
  - Initial analysis has found that per-unit land prices were similar for affordable housing sites in rezoned and non-rezoned areas
  - City can work to expand **tools for market acquisitions:** Tax incentives, options to purchase, and continued partnerships with nonprofit and philanthropy

# Affordable Housing **Summary and Next Steps**

## **Summary:**

Final strategies will inform how the City:

- Advances the **current affordable housing pipeline**
- **Pursues new sites** through both strategic and opportunistic strategies
- **Promote sustainable and equitably distributed housing production** and acquisition citywide

## **Next steps:**

- **July-Aug 2025:** Continued community engagement & Practitioner Focus Group
- **Sept-Oct 2025:** Publish Affordable Housing Sites Analysis & Strategies and Informational CPC hearing



# Infrastructure Overview and Analysis

## Key Takeaways:

- **Growth has been anticipated and integrated into planning** for years by individual agencies and the Capital Planning Program. Growth allowed by rezoning is not new news.
- **Growth in rezoning areas is infill and upgrade needs are incremental**, compared to greenfield development or major new redevelopment (e.g. Treasure Island, Candlestick)
- **The cost of accommodating housing growth for most systems is a modest and integrated cost compared to planned major investments in existing infrastructure due to aging systems, regulation, resiliency, and climate adaptation.** New housing helps spread the cost of investments and generate additional users to support higher levels of service.
- **Growth will happen incrementally over time.** Monitoring the actual pace of growth enables agencies to coordinate investments strategically.

# Infrastructure Overview and Analysis



## Potable water (SFPUC)

- System has **adequate water through at least 2045 under normal conditions**. Residential water use was only 19% of SFPUC water demand in 2020. Despite growth, SF used less water in 2019 than in 2005.
- **Climate and regulatory factors are dramatically more significant in SFPUC's water resource planning than residential growth.**

## Wastewater & Sewer (SFPUC)

- Combined sewer system has **sufficient capacity for increased sanitary flows**. 100-yr old system continually being upgraded.
- **Upgrades at Oceanside Treatment plant** will increase redundancy, handle increased pollutant loads, and address increasing wet weather. SE Treatment Plant can handle needs through at least 2045.



# Infrastructure Overview and Analysis

## Power (SFPUC, PG&E)

- **SFPUC forecasts short/med/long term needs and can scale efficiently.** CleanPowerSF scaled in 4 years to meet demand for >50% of city.
- Future **local grid upgrades evaluated as needs arise**; need to reduce cost/time to establish service to new housing. Programs seek to increase efficiency and local generation and reduce peak demand.



## Fire Suppression/Emergency Response (SFPUC, SFFD)

- **Growth areas are well-served by SFFD.** SF has highest level of geographic coverage and best response times among peer cities.
- To supplement standard hydrant system for normal fires, SF has unique high-pressure network (EFWS), cisterns and other measures in case of major events. **Investments from voter-approved bonds are ongoing.**

# Infrastructure Overview and Analysis

## Transportation (SFMTA, SFCTA)

- HE EIR shows that rezoning contributes a modest amount to overall transportation demand. EIR mitigations to limit transit delay include transit-only lanes and reduced parking maximums.
- **As population growth occurs, existing service levels and routes are adjusted.**
  - **Short-term improvements** ongoing through **Muni Forward, Biking and Rolling Plan** and other programs (eg transit-only lanes, signal priority, bike facilities, pedestrian safety)
  - **Medium-term upgrades** (eg **Muni Metro Core Capacity**) and **long-term expansions** under study (e.g. **Geary/19<sup>th</sup> Rail, Central Subway Extension**)
- Local, regional and state stakeholders are working on **sustainable funding strategies for transit operations**



**Recent:**  
1, 30, 5/5R, 38/38R,  
28/28R, L, and N

**Muni Forward  
Corridor  
Improvements**

**Upcoming:**  
N, 7, 22, and 29

# Infrastructure Overview and Analysis



## Other community facilities

- **Schools:** **SFUSD** has adequate capacity for enrollment growth for foreseeable future. Additional students would be welcome, and SFUSD is continually monitoring development trends and forecasting student population.
- **Libraries:** Rezoning areas have excellent **SFPL** library coverage and exceeds service standards for population per facility even with growth. Programmatic and staffing changes may possibly be warranted in the future as needs change.
- **Safety:** **SFPD** stations have adequate geographic coverage in rezoning areas. Staffing levels and policing priorities are ever-evolving.

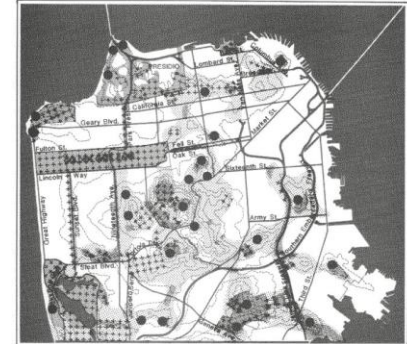
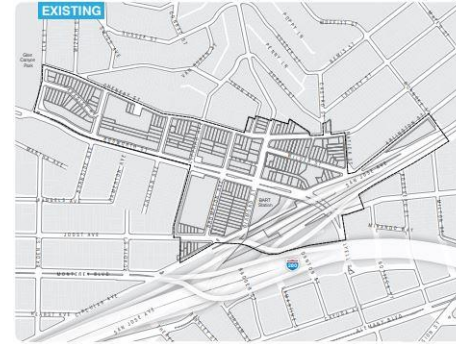


# General Plan Amendments Initiation

- **General Plan Amendments** must be initiated by the Planning Commission.
- Planning Commission **Initiation Resolution** announces its intention to consider a proposed amendment to the General Plan at a future hearing.
- **This item is before the commission today to initiate proposed amendments to the General Plan and announce the Commission's intention to consider adoption on or after September 11, 2025.**
- This will begin the newspaper noticing and scheduling process.

# General Plan Amendments Initiation

- **Goal:** Bring the General Plan – including its Elements and Area Plans – into alignment with the Family Zoning Plan.
- **Actions:** Remove outdated height maps and update language about height limits, density limits, and building scale and character.



Urban Design Element  
Commerce and Industry Element  
Transportation Element  
Balboa Park Station Area Plan  
Glen Park Community Plan  
Market and Octavia Area Plan  
Northeastern Waterfront Plan  
Van Ness Avenue Area Plan  
Western SoMa (South of Market) Area Plan  
Western Shoreline Area Plan.  
Land Use Index

## AREA PLANS & ELEMENTS PROPOSED FOR UPDATES

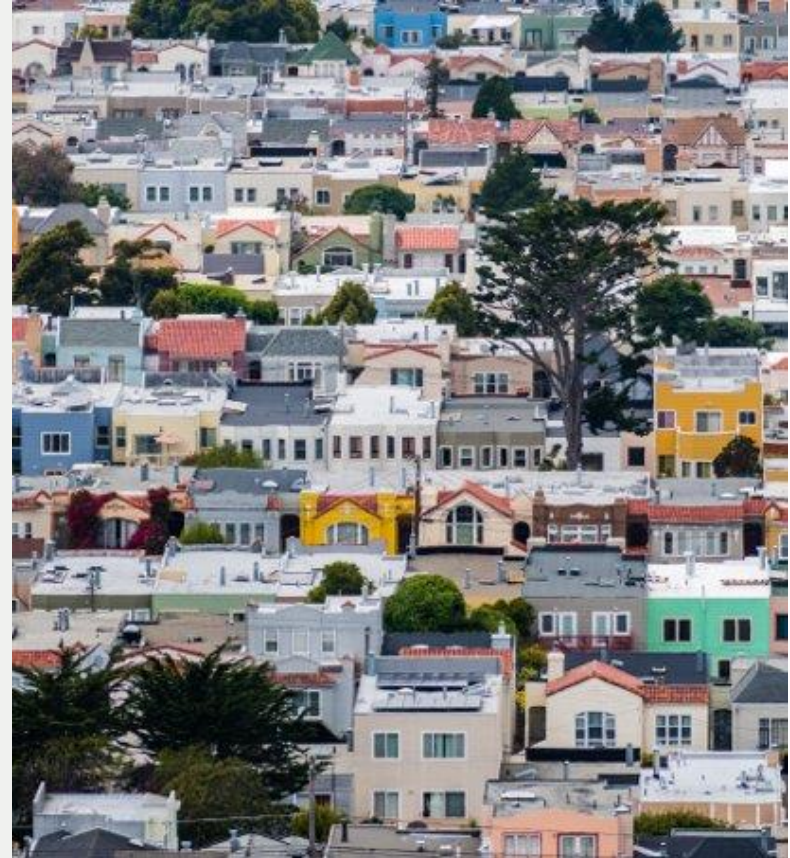
# General Plan Amendments Initiation

## Goals:

- Update language to reflect dynamic and evolving neighborhoods, moving away from static conditions while respecting community context.
- Acknowledge meeting our needs requires some changes, including taller and denser buildings in some places, in keeping with urban design principles.

## Example:

- **Existing Language:** “Preserve” existing height, scale, and character.
- **Updated Language:** “Recognize” and “consider” existing context.



# General Plan Amendments Initiation

## San Francisco Coastal Zone



**Local Coastal Program (LCP):** Two-part policy and regulatory document required by the CA Coastal Act that establishes policies for SF's Coastal Zone.

1. **Implementation Plan** regulates development within the Coastal Zone.
2. **Land Use Plan** sets policy for the Coastal Zone. The Western Shoreline Area Plan (WSAP) of the General Plan serves as the City's Land Use Plan.
  - Because the General Plan Amendments include amendments to the WSAP, these are amendments to the Land Use Plan of the LCP

# Legislation Next Steps

- **September 11th: Planning Commission – Adoption**
  - 20-day notification period begins August 22nd
  - 90-day CPC Review ends September 22nd
- **October to November: Board of Supervisors – Adoption**
  - Land Use & Transportation Committee, then Full Board
- **January 31, 2026:** State deadline for adoption





# Thank you!



<http://sfplanning.org/rezoning-events>



[sf.housing.choice@sfgov.org](mailto:sf.housing.choice@sfgov.org)



Art by Michelle McNeil, Human Rights Commission

**WHEN I BECOME A SENIOR CITIZEN  
I WANT TO BE ABLE TO **STAY IN SF****

