



SAN FRANCISCO PLANNING DEPARTMENT

MEMO

Memo To the Planning Commission

Hearing Date: April 28, 2022

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DATE: 21 April 2022

PROJECT NAME: HOUSING BALANCE REPORT NO. 14

CASE NUMBER: 2018-004047CWP-02

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RECOMMENDATION: None - Informational Only

SUMMARY

This report is submitted in compliance with Ordinance No. 53-15 requiring the Planning Department to monitor and report on the housing balance between new market rate and new affordable housing production. One of the stated purposes of the Housing Balance is “to ensure that data on meeting affordable housing targets citywide and within neighborhoods informs the approval process for new housing development.” This report is the fourteenth in the series and covers the ten-year period from 1 January 2012 through 31 December 2021. The report is published twice annually in April and October.

The ordinance defines the “Housing Balance” as the proportion of all new affordable housing units to the total number of all new housing units for a 10-year “Housing Balance Period,” accounting for any loss of units removed from “protected status.”¹ In addition, the reporting must include a calculation of “Projected Housing Balance” which is focused exclusively on forward-looking housing production and includes residential projects that have received approvals from the Planning Commission or Planning Department, including projects under construction, permitted for construction, and those entitled but that have not yet received permits to commence construction.

In the 2012 Q1—2021 Q4 Housing Balance Period, the Cumulative Housing Balance is 16.9%, which is higher than the previous period (14.5% for 2011 Q1—2020 Q4). The Expanded Citywide Cumulative Housing Balance is 24.8%, which is higher than the previous period (22.3% for 2011 Q1—2020 Q4), although this varies by Supervisor district. Distribution of the

¹ Units under “protected status” include units that are subject to rent control under the City’s Residential Rent Stabilization and Arbitration Ordinance.

Expanded Cumulative Housing Balance over the 11 Board of Supervisor Districts ranges from -75.5% (District 4) to 50.7% (District 5). Negative housing balances result from the large number of units permanently withdrawn from affordability protection relative to the number of total net new units and net affordable units built in those districts.

The Projected Housing Balance Citywide is 20.2%, higher than the 17.3% projection in the previous report. The ordinance specifically excludes master planned multi-phase development projects from the projected housing balance calculations until site permits are obtained. Accordingly, the Balboa Reservoir, India Basin, and Mission Rock projects are excluded from this projection.

The Projected Housing Balance methodology as defined by the ordinance is not necessarily an accurate predictor of current or future affordable housing production, as it does not account for the expected (but not yet entitled or permitted) affordable housing projects with funding either in hand or expected by the City. Examples of these projects include those funded through inclusionary fees paid by housing projects otherwise included in the Balance calculation, job-housing linkage fees paid by commercial development, voter-approved bonds, and other sources of funding. For the past ten years, deed-restricted affordable housing production has accounted for 23% of overall production. As of 2021 Q4, 20% of units that have either received entitlements, have approved permits from DBI, or are currently under construction, will be affordable².

BACKGROUND

On 21 April 2015, the Board of Supervisors passed Ordinance No. 53-15 amending the *Planning Code* to include a new *Section 103* requiring the Planning Department to monitor and report on the Housing Balance between new market rate housing and new affordable housing production. The *Housing Balance Report* is submitted bi-annually by April 1 and October 1 of each year and published on the Planning Department's website. *Planning Code Section 103* also requires an annual hearing at the Board of Supervisors on strategies for achieving and maintaining the required housing balance in accordance with the City's housing production goals. (See *Appendix A* for complete text of Ordinance No. 53-15.) This hearing typically accompanies the April report.

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

² See Table 2

Housing production targets adopted by the State and the Association of Bay Area Governments, and reflected in the City's *Housing Element*, last adopted in April 2015, calls for a minimum of 28,870 new units to be built in San Francisco between 2015 and 2022, including a minimum of 16,333 affordable units (57%³ of the total). As mandated by law, the City provides the State Department of Housing and Community Development an annual progress report.⁴ In addition, in November 2014, San Francisco's voters endorsed Proposition K, which set as city policy a goal to help construct or rehabilitate at least 30,000 homes by 2020, at least 33% of which will be affordable to low- and moderate-income households.⁵ While the *Housing Balance Report* is intended to supplement analysis towards adopted City housing goals, the report and its calculations do not specifically track performance toward meeting goals set by the City's *Housing Element/RHNA* and Proposition K and are not comparable because the metrics and methodologies differ.

This *Housing Balance Report* was prepared from data gathered from other published sources including the Planning Department's annual *Housing Inventory* and quarterly *Pipeline Report* data, Department of Building Inspection data, San Francisco Rent Board data, and affordable housing data from the Mayor's Office of Housing and Community Development.

CUMULATIVE HOUSING BALANCE CALCULATION

Planning Code Section 103 calls for the Housing Balance "be expressed as a percentage, obtained by dividing the cumulative total of extremely low, very low, low, and moderate income affordable housing (all units 0-120% AMI) minus the lost protected units, by the total number of net new housing units within the Housing Balance Period." The ordinance requires that the "Cumulative Housing Balance" be provided using two calculations: a) one consisting of net housing built within a 10 year Housing Balance period, less units withdrawn from protected status, plus net units in projects that have received both approvals from the Planning Commission or Planning Department and site permits from the Department of Building Inspection, and b) the same calculation, with the addition of net units gained through acquisition and rehabilitation of affordable units, HOPE SF, Small Sites, and RAD Program units⁶. "Protected units" include units that are subject to rent control under the City's Residential Rent Stabilization and Arbitration Ordinance. Additional elements that figure into the Housing Balance include completed HOPE SF and RAD public housing replacement, substantially rehabilitated units, and single-room occupancy hotel units (SROs). The equation below shows the second, expanded calculation of the Cumulative Housing Balance.

³ The Ordinance inaccurately stated that "22% of new housing demands to be affordable to households of moderate means." San Francisco's Regional Housing Needs Assessment (RHNA) allocation for moderate income households is 19% of total production goals.

⁴ Printed annual progress reports submitted by all California jurisdictions can be accessed here – <http://www.hcd.ca.gov/community-development/housing-element/annual-progress-reports/index.php> -- or by calling HCD at 916-263-2911 for the latest reports as many jurisdictions now file reports online.

⁵ For tracking of the Prop K affordable housing goal, see <https://sfmohcd.org>.

⁶ HOPESF and Rental Assistance Demonstration (RAD) Program units are deed-restricted affordable units that have been acquired and rehabilitated.

| | |
|--|--|
| [Net New Affordable Housing | |
| + Completed Acquisitions & Rehabs | |
| + Completed HOPE SF | |
| + RAD Public Housing Replacement | |
| + Entitled & Permitted Affordable Units] | |
| – [Units Removed from Protected Status] | = |
| | EXPANDED CUMULATIVE HOUSING BALANCE |

[Net New Housing Built + Net Entitled & Permitted Units]

The first “Housing Balance Period” is a ten-year period starting with the first quarter of 2005 through the last quarter of 2014. Subsequent housing balance reports will cover the 10 years preceding the most recent quarter. This report covers January 2012 (Q1) through December 2021 (Q4).

Table 1A below shows that the Cumulative Housing Balance for 10-year 2012 Q1—2021 Q4 period is 16.9% citywide. The Cumulative Housing Balance for the previous 10-year period from 2011 Q1—2020 Q4 was 14.5%.

Note that, in previously submitted reports, units acquired for preservation, rehabilitated units, and Small Sites Program units were included in Table 1A. This formulation is not supported by the language in Ordinance 53-15. These units should only be included in the Expanded Cumulative Housing Balance (Table 1B). We have removed them from Table 1A this report, and from the figures we quote for comparison from previous reports.

In 2016, the Board of Supervisors revised the ordinance to include Owner Move-Ins (OMIs)⁷ in the “Units Removed from Protected Status” section of the Housing Balance calculation. Although OMIs were not specifically named in the original Ordinance in the calculation of the Housing Balance, these were included in earlier reports because this type of no-fault eviction results in the loss of rent-controlled units either permanently or for a period of time.

Table 1A
Cumulative Housing Balance Calculation, 2012 Q1—2021 Q4

| Bos District | Net New Affordable Housing Built | Total Entitled & Permitted Affordable Units | Units Removed from Protected Status | Total Net New Units Built | Total Entitled & Permitted Units | Cumulative Housing Balance |
|---------------|----------------------------------|---|-------------------------------------|---------------------------|----------------------------------|----------------------------|
| BoS Dist. 1 | 46 | - | 477 | 466 | 302 | -56.1% |
| BoS Dist. 2 | 98 | 41 | 289 | 988 | 650 | -9.2% |
| BoS Dist. 3 | 443 | 252 | 298 | 1,307 | 1,239 | 15.6% |
| BoS Dist. 4 | 37 | 15 | 474 | 189 | 370 | -75.5% |
| BoS Dist. 5 | 604 | 343 | 324 | 1,749 | 1,511 | 19.1% |
| BoS Dist. 6 | 3,991 | 3,863 | 142 | 19,058 | 16,348 | 21.8% |
| BoS Dist. 7 | 152 | 284 | 225 | 621 | 5,820 | 3.3% |
| BoS Dist. 8 | 275 | 38 | 610 | 1,556 | 722 | -13.0% |
| BoS Dist. 9 | 768 | 368 | 660 | 2,376 | 1,644 | 11.8% |
| BoS Dist. 10 | 2,001 | 4,298 | 299 | 6,175 | 19,244 | 23.6% |
| BoS Dist. 11 | 57 | 320 | 402 | 414 | 719 | -2.2% |
| Totals | 8,472 | 9,822 | 4,200 | 34,899 | 48,569 | 16.9% |

⁷ Owner Move-In (OMI) Evictions occur when a landlord or property owner recovers possession of a rental unit for the occupancy of the owner or relative of the owner for use as their principal residence for a period of at least 36 continuous months. This information is collected from the Rent Board.

Table 1B below shows the Expanded Cumulative Housing Balances for Board of Supervisor Districts, ranging from -75.5% (District 4) to 50.7% (District 5). Negative balances seen in Districts 1 (-36.1%) and 4 (-75.5%) resulted from the units removed from protected status relative to the net new affordable housing and net new housing units built in those districts.

Table 1B
Expanded Cumulative Housing Balance Calculation, 2012 Q1—2021 Q4

| Bos District | Net New Affordable Housing Built | Acquisitions, Rehabs & Small Sites Completed | RAD & Hope SF Replacement Units | Total Entitled & Permitted Affordable Units | Units Removed from Protected Status | Total Net New Units Built | Total Entitled & Permitted Units | Expanded Cumulative Housing Balance |
|---------------|----------------------------------|--|---------------------------------|---|-------------------------------------|---------------------------|----------------------------------|-------------------------------------|
| BoS Dist. 1 | 46 | 10 | 144 | - | 477 | 466 | 302 | -36.1% |
| BoS Dist. 2 | 98 | 25 | 251 | 41 | 289 | 988 | 650 | 7.7% |
| BoS Dist. 3 | 443 | 100 | 576 | 252 | 298 | 1,307 | 1,239 | 42.1% |
| BoS Dist. 4 | 37 | - | - | 15 | 474 | 189 | 370 | -75.5% |
| BoS Dist. 5 | 604 | 223 | 806 | 343 | 324 | 1,749 | 1,511 | 50.7% |
| BoS Dist. 6 | 3,991 | 1,442 | 560 | 3,863 | 142 | 19,058 | 16,348 | 27.4% |
| BoS Dist. 7 | 152 | - | 109 | 284 | 225 | 621 | 5,820 | 5.0% |
| BoS Dist. 8 | 275 | 77 | 330 | 38 | 610 | 1,556 | 722 | 4.8% |
| BoS Dist. 9 | 768 | 449 | 268 | 368 | 660 | 2,376 | 1,644 | 29.7% |
| BoS Dist. 10 | 2,001 | - | 1,186 | 4,298 | 299 | 6,175 | 19,244 | 28.3% |
| BoS Dist. 11 | 57 | 42 | - | 320 | 402 | 414 | 719 | 1.5% |
| Totals | 8,472 | 2,368 | 4,230 | 9,822 | 4,200 | 34,899 | 48,569 | 24.8% |

PROJECTED HOUSING BALANCE

Table 2 below summarizes residential projects that have received entitlements from the Planning Commission or the Planning Department, have received an approved building permit from the Department of Building Inspection (DBI), or are currently under construction. Table 2 is the summary of Tables 3 (Units in Building Permits Approved or Under Construction, as of 2021 Q4) and 4 (Entitled Units Without a Building Permit Issued, as of 2021 Q4), thus providing a projected housing balance that includes any residential project that has received approval from the Planning Commission or Planning Department, as required by the ordinance.

The overall projected housing balance at the end of 2021 Q4 is 20.2%; for the previous 10-year reporting period, this projected balance was 17.3%. The projected balance is also expected to change as several major projects have yet to declare how their affordable housing requirements will be met. In addition, three entitled major development projects—Balboa Reservoir, India Basin and Mission Rock—are not included in the accounting until site or building permits are issued, as specified in the ordinance. Remaining phases from these projects will yield an additional 7,300 net new units; 22% (or about 1,570 units) would be affordable to low- and moderate-income households.⁸

As required by the ordinance, the Projected Housing Balance also does not account for affordable housing units that will be produced with current and future affordable housing funding (e.g. Inclusionary Housing Fee, Jobs-Housing Linkage Fee, bond funds), including funds owed or already paid by projects in a given reporting cycle. Those affordable housing units are produced several years after the fee is collected. Units produced through the fee typically serve lower income households than do the inclusionary units, including special needs populations requiring services, such as seniors, transitional aged youth, families, and veterans.

Table 2
Projected Housing Balance (Entitled, Permitted, and Under Construction Units), 2021 Q4

| Bos District | Very Low Income | Low Income | Moderate Income | TBD | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|---------------|-----------------|--------------|-----------------|--------------|------------------------|---------------|--|
| BoS Dist. 1 | - | - | - | - | - | 302 | 0.0% |
| BoS Dist. 2 | - | 28 | 6 | 7 | 41 | 650 | 6.3% |
| BoS Dist. 3 | 54 | 116 | 15 | 67 | 252 | 1,239 | 20.3% |
| BoS Dist. 4 | 33 | 62 | 51 | (131) | 15 | 370 | 4.1% |
| BoS Dist. 5 | 108 | 85 | 13 | 137 | 343 | 1,511 | 22.7% |
| BoS Dist. 6 | 496 | 967 | 429 | 1,971 | 3,863 | 16,348 | 23.6% |
| BoS Dist. 7 | - | - | - | 284 | 284 | 5,820 | 4.9% |
| BoS Dist. 8 | - | 20 | 5 | 13 | 38 | 722 | 5.3% |
| BoS Dist. 9 | 89 | 95 | 18 | 166 | 368 | 1,644 | 22.4% |
| BoS Dist. 10 | 330 | 148 | 100 | 3,720 | 4,298 | 19,244 | 22.3% |
| BoS Dist. 11 | 163 | 89 | 79 | (11) | 320 | 719 | 44.5% |
| Totals | 1,273 | 1,610 | 716 | 6,223 | 9,822 | 48,569 | 20.2% |

⁸ Calculated from the 2021 Q4 Planning Pipeline

Permitted and Under Construction Units

Table 3 below shows units that have received approved building permits or are currently under construction as of 2021 Q4. 56.5% of these units will be or are currently being built in District 6. Another 16.1% will be or are currently being built in District 10. Of all units that have received approved permits from DBI or are currently under construction, 29% will be affordable.

Table 3
Building Permits Approved or Under Construction, as of 2021 Q4

| BoS District | Very Low Income | Low Income | Moderate Income | TBD | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|---------------|-----------------|--------------|-----------------|--------------|------------------------|---------------|--|
| BoS Dist. 1 | - | - | - | - | - | 203 | 0.0% |
| BoS Dist. 2 | - | 22 | - | 1 | 23 | 232 | 9.9% |
| BoS Dist. 3 | 54 | 115 | 15 | 62 | 246 | 426 | 57.7% |
| BoS Dist. 4 | 33 | 62 | 51 | (134) | 12 | 242 | 5.0% |
| BoS Dist. 5 | 32 | 73 | 13 | 13 | 131 | 521 | 25.1% |
| BoS Dist. 6 | 496 | 857 | 316 | 542 | 2,211 | 6,543 | 33.8% |
| BoS Dist. 7 | - | - | - | - | - | 1,064 | 0.0% |
| BoS Dist. 8 | - | 18 | 5 | 5 | 28 | 391 | 7.2% |
| BoS Dist. 9 | 89 | 79 | 16 | 146 | 330 | 1,102 | 29.9% |
| BoS Dist. 10 | 97 | 58 | 8 | 468 | 631 | 2,099 | 30.1% |
| BoS Dist. 11 | 163 | 81 | 79 | (19) | 304 | 471 | 64.5% |
| Totals | 964 | 1,365 | 503 | 1,084 | 3,916 | 13,294 | 29.5% |

Entitled Units

Table 4 below shows units that have received entitlements from the Planning Commission or the Planning Department as of 2021 Q4. 48.6% of these units will be built in District 10, and 27.8% in District 6. Of all units that have received Planning entitlements, 17% will be affordable. Three entitled major development projects—Balboa Reservoir, India Basin and Mission Rock—are not included in the accounting as specified in the ordinance.

Table 4
Entitled Units without a Building Permit Issued, as of 2021 Q4

| Bos District | Very Low Income | Low Income | Moderate Income | TBD | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|---------------------|-----------------|------------|-----------------|--------------|------------------------|---------------|--|
| BoS Dist. 1 | - | - | - | - | - | 99 | 0.0% |
| BoS Dist. 2 | - | 6 | 6 | 6 | 18 | 418 | 4.3% |
| BoS Dist. 3 | - | 1 | - | 5 | 6 | 813 | 0.7% |
| BoS Dist. 4 | - | - | - | 3 | 3 | 128 | 2.3% |
| BoS Dist. 5 | 76 | 12 | - | 124 | 212 | 990 | 21.4% |
| BoS Dist. 6 | - | 110 | 113 | 1,429 | 1,652 | 9,805 | 16.8% |
| BoS Dist. 7 | - | - | - | 284 | 284 | 4,756 | 6.0% |
| BoS Dist. 8 | - | 2 | - | 8 | 10 | 331 | 3.0% |
| BoS Dist. 9 | - | 16 | 2 | 20 | 38 | 542 | 7.0% |
| BoS Dist. 10 | 233 | 90 | 92 | 3,252 | 3,667 | 17,145 | 21.4% |
| BoS Dist. 11 | - | 8 | - | 8 | 16 | 248 | 6.5% |
| Totals | 309 | 245 | 213 | 5,139 | 5,906 | 35,275 | 16.7% |

CUMULATIVE HOUSING BALANCE ELEMENTS

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

Affordable Housing and Net New Housing Production

Table 5 below shows housing production between 2012 Q1 and 2021 Q4. This ten-year period resulted in a net addition of 34,899 units to the City’s housing stock, including 8,472 affordable units (or 24.3%). Most of the net new and affordable housing units built in the ten-year reporting period were in District 6 (19,058 and 3,991 units respectively). District 10 follows with 6,175 net new units, including 2,001 affordable units.

The table below also shows that 24.3% of net new units built between 2012 Q1 and 2021 Q4 were affordable units. 41.7 of the affordable units built during that period were in District 6, and 23.6% in District 10.

Table 5
New Housing Production by Affordability, 2012 Q1—2021 Q4⁹

| BoS District | Extr. Low Income | Very Low Income | Low Income | Moderate Income | Middle Income | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|---------------|------------------|-----------------|--------------|-----------------|---------------|------------------------|---------------|--|
| BoS Dist. 1 | - | - | - | 46 | - | 46 | 466 | 10% |
| BoS Dist. 2 | - | - | - | 98 | - | 98 | 988 | 10% |
| BoS Dist. 3 | 18 | 247 | 89 | 89 | - | 443 | 1,307 | 34% |
| BoS Dist. 4 | - | 2 | 2 | 33 | - | 37 | 189 | 20% |
| BoS Dist. 5 | - | 251 | 175 | 178 | - | 604 | 1,749 | 35% |
| BoS Dist. 6 | 373 | 1,303 | 1,677 | 591 | 47 | 3,991 | 19,058 | 21% |
| BoS Dist. 7 | - | 71 | 31 | 50 | - | 152 | 621 | 24% |
| BoS Dist. 8 | - | 117 | 99 | 59 | - | 275 | 1,556 | 18% |
| BoS Dist. 9 | 40 | 299 | 365 | 64 | - | 768 | 2,376 | 32% |
| BoS Dist. 10 | 67 | 1,087 | 647 | 200 | - | 2,001 | 6,175 | 32% |
| BoS Dist. 11 | - | - | - | 57 | - | 57 | 414 | 14% |
| Totals | 498 | 3,377 | 3,085 | 1,465 | 47 | 8,472 | 34,899 | 24.3% |

⁹ It should be noted that units affordable to Extremely Very Low Income (EVLI) households are included under the Very Low Income (VLI) category because certain projects that benefit homeless individuals and families – groups considered as EVLI – have income eligibility caps at the VLI level.

Acquisition and Rehabilitation of Affordable Housing Units

Table 6a below shows units that have been rehabilitated and/or acquired for preservation between 2012 Q1 and 2021 Q4 to ensure permanent affordability. These are mostly single-room occupancy hotel units that are affordable to extremely-low and very-low-income households.

Table 6A
Acquisitions and Rehabilitation of Affordable Housing, 2012 Q1—2021 Q4

| BoS District | No. of Building | No. of Units |
|---------------|-----------------|--------------|
| BoS Dist. 1 | 2 | 5 |
| BoS Dist. 2 | 1 | 25 |
| BoS Dist. 3 | 4 | 94 |
| BoS Dist. 4 | - | - |
| BoS Dist. 5 | 5 | 220 |
| BoS Dist. 6 | 19 | 1,385 |
| BoS Dist. 7 | - | - |
| BoS Dist. 8 | 8 | 43 |
| BoS Dist. 9 | 24 | 324 |
| BoS Dist. 10 | - | - |
| BoS Dist. 11 | 1 | 21 |
| Totals | 64 | 2,117 |

Small Sites Program

The San Francisco Small Sites Program (SSP) is an initiative of the Mayor’s Office of Housing and Community Development (MOHCD) to acquire small rent-controlled buildings (with four to 25 units) where tenants are at risk of eviction through the Ellis Act ¹⁰or owner move-ins. Since its inception in 2014, 38 buildings with 251 units have been acquired.

Table 6B
Small Sites Program, 2014—2021 Q4

| BoS District | No. of Building | No. of Units |
|---------------|-----------------|--------------|
| BoS Dist. 1 | 2 | 5 |
| BoS Dist. 2 | - | - |
| BoS Dist. 3 | 2 | 6 |
| BoS Dist. 4 | - | - |
| BoS Dist. 5 | 3 | 3 |
| BoS Dist. 6 | 5 | 57 |
| BoS Dist. 7 | - | - |
| BoS Dist. 8 | 7 | 34 |
| BoS Dist. 9 | 18 | 125 |
| BoS Dist. 10 | - | - |
| BoS Dist. 11 | 1 | 21 |
| Totals | 38 | 251 |

¹⁰ Ellis Act evictions occur when a landlord withdraws the rental unit from the residential rental housing market.

RAD Program

The San Francisco Housing Authority's Rental Assistance Demonstration Program (RAD) preserves at-risk public and assisted housing projects.

Table 7
RAD Affordable Units, 2015-2021 Q4

| BoS District | No. of Building | No. of Units |
|---------------|-----------------|--------------|
| BoS Dist. 1 | 2 | 144 |
| BoS Dist. 2 | 3 | 251 |
| BoS Dist. 3 | 4 | 576 |
| BoS Dist. 4 | - | - |
| BoS Dist. 5 | 6 | 806 |
| BoS Dist. 6 | 4 | 560 |
| BoS Dist. 7 | 1 | 109 |
| BoS Dist. 8 | 4 | 330 |
| BoS Dist. 9 | 2 | 268 |
| BoS Dist. 10 | 4 | 1,186 |
| BoS Dist. 11 | - | - |
| Totals | 30 | 4,230 |

Units Removed from Protected Status

San Francisco’s Residential Rent Stabilization and Arbitration Ordinance protects tenants and preserves affordability of about 175,000 rental units by limiting annual rent increases. Landlords can, however, terminate tenants’ leases through no-fault evictions that are not the tenants’ fault. The Housing Balance calculation takes into account units permanently withdrawn from rent stabilization as loss of affordable housing. The following no-fault evictions affect the supply of rent-controlled units by removing units from the rental market: condo conversion, demolition, Ellis Act, and owner move-ins (OMIs). It should be noted that initially, OMIs were not specifically named by the Ordinance to be included in the calculation. However, because owner move-ins have the effect of the losing rent-controlled units either permanently or for a substantial period of time, these numbers are included in the Housing Balance calculation as intended by the legislation’s sponsors. Some of these OMI units may return to being rentals and will still fall under the rent control ordinance. On 14 November 2016, the Board of Supervisors amended Planning Code Section 103 to include OMIs as part of the housing balance calculation.

Table 8 below shows the distribution of no-fault eviction notices issued between January 2012 and December 2021. Eviction notices have been commonly used as proxy for evictions. Owner Move-In and Ellis Act notices made up most of no-fault evictions (58% and 31% respectively). Distribution of these no-fault eviction notices is almost evenly dispersed, with Districts 8 and 9 leading (each with approximately 15% of the total units removed from protected status).

Table 8
Units Removed from Protected Status, 2012 Q1—2021 Q4

| Bos District | Condo Conversion | Demolition | Ellis Act | Owner Move-In | Units Removed from Protected Status |
|---------------|------------------|------------|--------------|---------------|-------------------------------------|
| BoS Dist. 1 | 3 | 20 | 135 | 319 | 477 |
| BoS Dist. 2 | 18 | 9 | 80 | 182 | 289 |
| BoS Dist. 3 | 7 | 7 | 164 | 120 | 298 |
| BoS Dist. 4 | - | 69 | 91 | 314 | 474 |
| BoS Dist. 5 | 17 | 12 | 81 | 214 | 324 |
| BoS Dist. 6 | - | 75 | 55 | 12 | 142 |
| BoS Dist. 7 | - | 28 | 60 | 137 | 225 |
| BoS Dist. 8 | 28 | 26 | 230 | 326 | 610 |
| BoS Dist. 9 | 8 | 43 | 270 | 339 | 660 |
| BoS Dist. 10 | 2 | 36 | 54 | 207 | 299 |
| BoS Dist. 11 | - | 61 | 72 | 269 | 402 |
| Totals | 83 | 386 | 1,292 | 2,439 | 4,200 |

PERIODIC REPORTING AND ONLINE ACCESS

This report complies with the *Planning Code Section 103* requirement that the Planning Department publish and update the *Housing Balance Report* bi-annually on April 1 and October 1 of each year. *Housing Balance Reports* are available online, as mandated by the ordinance, by going to this link: <https://sfplanning.org/housing-balance-report>.

ANNUAL HEARING

A hearing on the Housing Balance before the Board of Supervisors is scheduled each year. The Mayor's Office of Housing and Community Development, the Mayor's Office of Economic and Workforce Development, the Rent Stabilization Board, the Department of Building Inspection, and the City Economist will present strategies for achieving and maintaining a housing balance consistent with the City's housing goals at this annual hearing. The ordinance also requires that MOHCD will determine the amount of funding needed to bring the City into the required minimum 33% should the cumulative housing balance fall below that threshold.

APPENDIX A
Ordinance 53-15

AMENDED IN COMMITTEE
4/6/15

FILE NO. 150029

ORDINANCE NO. 53-15

1 [Planning Code - City Housing Balance Monitoring and Reporting]

2
3 **Ordinance amending the Planning Code to require the Planning Department to monitor**
4 **the balance between new market rate housing and new affordable housing, and publish**
5 **a bi-annual Housing Balance Report; requiring an annual hearing at the Board of**
6 **Supervisors on strategies for achieving and maintaining the required housing balance**
7 **in accordance with San Francisco's housing production goals; and making**
8 **environmental findings, Planning Code, Section 302 findings, and findings of**
9 **consistency with the General Plan, and the eight priority policies of Planning Code,**
10 **Section 101.1.**

11
12 NOTE: **Unchanged Code text and uncodified text** are in plain Arial font.
13 **Additions to Codes** are in *single-underline italics Times New Roman font*.
14 **Deletions to Codes** are in *strikethrough italics Times New Roman font*.
15 **Board amendment additions** are in double-underlined Arial font.
16 **Board amendment deletions** are in ~~strikethrough Arial font~~.
17 **Asterisks (* * * *)** indicate the omission of unchanged Code
18 subsections or parts of tables.

19 Be it ordained by the People of the City and County of San Francisco:

20 Section 1. Findings.

21 (a) The Planning Department has determined that the actions contemplated in this
22 ordinance comply with the California Environmental Quality Act (California Public Resources
23 Code Sections 21000 et seq.). Said determination is on file with the Clerk of the Board of
24 Supervisors in File No. 150029 and is incorporated herein by reference. The Board of
25 Supervisors affirms this determination.

(b) On March 19, 2015, the Planning Commission, in Resolution No. 19337, adopted
findings that the actions contemplated in this ordinance are consistent, on balance, with the

Supervisor Kim
BOARD OF SUPERVISORS

Page 1

1 adopts these findings as its own. A copy of said Resolution is on file with the Clerk of the
2 Board of Supervisors in File No. 150029, and is incorporated herein by reference.

3 (c) Pursuant to Planning Code Section 302, this Board finds that this Planning Code
4 Amendment will serve the public necessity, convenience, and welfare for the reasons set forth
5 in Planning Commission Resolution No. 150029 and the Board incorporates such reasons
6 herein by reference.

7
8 Section 2. The Planning Code is hereby amended by adding new Section 103 to read
9 as follows:

10 **SEC. 103. HOUSING BALANCE MONITORING AND REPORTING.**

11 **(a) Purposes.** *To maintain a balance between new affordable and market rate housing City-*
12 *wide and within neighborhoods, to make housing available for all income levels and housing need*
13 *types, to preserve the mixed income character of the City and its neighborhoods, to offset the*
14 *withdrawal of existing housing units from rent stabilization and the loss of single-room-occupancy*
15 *hotel units, to ensure the availability of land and encourage the deployment of resources to provide*
16 *sufficient housing affordable to households of very low, low, and moderate incomes, to ensure adequate*
17 *housing for families, seniors and the disabled community, to ensure that data on meeting affordable*
18 *housing targets City-wide and within neighborhoods informs the approval process for new housing*
19 *development, and to enable public participation in determining the appropriate mix of new housing*
20 *approvals, there is hereby established a requirement, as detailed in this Section 103, to monitor and*
21 *regularly report on the housing balance between market rate housing and affordable housing.*

22 **(b) Findings.**

23 *(1) In November 2014, the City voters enacted Proposition K, which established City*
24 *policy to help construct or rehabilitate at least 30,000 homes by 2020. More than 50% of this housing*
25 *would be affordable for middle-class households, with at least 33% affordable for low- and moderate-*

1 income households, and the City is expected to develop strategies to achieve that goal. This section
2 103 sets forth a method to track performance toward the City's Housing Element goals and the near-
3 term Proposition K goal that 33% of all new housing shall be affordable housing, as defined herein.

4 (2) The City's rent stabilized and permanently affordable housing stock serves very low-
5 low-, and moderate-income families, long-time residents, elderly seniors, disabled persons and others.
6 The City seeks to achieve and maintain an appropriate balance between market rate housing and
7 affordable housing City-wide and within neighborhoods because the availability of decent housing and
8 a suitable living environment for every San Franciscan is of vital importance. Attainment of the City's
9 housing goals requires the cooperative participation of government and the private sector to expand
10 housing opportunities to accommodate housing needs for San Franciscans at all economic levels and to
11 respond to the unique needs of each neighborhood where housing will be located.

12 (3) For tenants in unsubsidized housing, affordability is often preserved by the
13 Residential Rent Stabilization and Arbitration Ordinance's limitations on the size of allowable rent
14 increases during a tenancy. As documented in the Budget and Legislative Analyst's October 2013
15 Policy Analysis Report on Tenant Displacement, San Francisco is experiencing a rise in units
16 withdrawn from rent controls. Such rises often accompany periods of sharp increases in property
17 values and housing prices. From 1998 through 2013, the Rent Board reported a total of 13,027 no-fault
18 evictions (i.e., evictions in which the tenant had not violated any lease terms, but the owner sought to
19 regain possession of the unit). Total evictions of all types have increased by 38.2% from Rent Board
20 Year (i.e. from March through February) 2010 to Rent Board Year 2013. During the same period, Ellis
21 Act evictions far outpaced other evictions, increasing by 169.8% from 43 in Rent Board Year 2010 to
22 116 in Rent Board Year 2013. These numbers do not capture the large number of owner buyouts of
23 tenants, which contribute further to the loss of rent-stabilized units from the housing market. Any fair
24 assessment of the affordable housing balance must incorporate into the calculation units withdrawn
25 from rent stabilization.

1 (4) Pursuant to Government Code Section 65584, the Association of Bay Area
2 Governments (ABAG), in coordination with the California State Department of Housing and
3 Community Development (HCD), determines the Bay Area's regional housing need based on regional
4 trends, projected job growth, and existing needs. The regional housing needs assessment (RHNA)
5 determination includes production targets addressing housing needs of a range of household income
6 categories. For the RHNA period covering 2015 through 2022, ABAG has projected that at least 38%
7 of new housing demands for San Francisco will be from very low and low income households
8 (households earning under 80% of area median income), and another 22% of new housing demands to
9 be affordable to households of moderate means earning between 80% and 120% of area median
10 income). Market-rate housing is considered housing with no income limits or special requirements
11 attached.

12 (5) The Housing Element of the City's General Plan states: "Based on the growing
13 population, and smart growth goals of providing housing in central areas like San Francisco, near jobs
14 and transit, the State Department of Housing and Community Development (HCD), with the
15 Association of Bay Area Governments (ABAG), estimates that in the current 2015-2022 Housing
16 Element period San Francisco must plan for the capacity for roughly 28,870 new units, 57% of which
17 should be suitable for housing for the extremely low, very low, low and moderate income households to
18 meet its share of the region's projected housing demand." Objective 1 of the Housing Element states
19 that the City should "identify and make available for development adequate sites to meet the City's
20 housing needs, especially permanently affordable housing." Objective 7 states that San Francisco's
21 projected affordable housing needs far outpace the capacity for the City to secure subsidies for new
22 affordable units.

23 (6) In 2012, the City enacted Ordinance 237-12, the "Housing Preservation and
24 Production Ordinance," codified in Administrative Code Chapter 10E.4, to require Planning
25 Department staff to regularly report data on progress toward meeting San Francisco's quantified

1 production goals for different household income levels as provided in the General Plan's Housing
2 Element. That Ordinance requires data on the number of units in all stages of the housing production
3 process at various affordability levels to be included in staff reports on all proposed projects of five
4 residential units or more and in quarterly housing production reports to the Planning Commission. The
5 Planning Department has long tracked the number of affordable housing units and total number of
6 housing units built throughout the City and in specific areas and should be able to track the ratio called
7 for in this Section 103.

8 (7) As the private market has embarked upon, and government officials have urged, an
9 ambitious program to produce significant amounts of new housing in the City, the limited remaining
10 available land makes it essential to assess the impact of the approval of new market rate housing
11 developments on the availability of land for affordable housing and to encourage the deployment of
12 resources to provide such housing.

13 **(c) Housing Balance Calculation.**

14 (1) For purposes of this Section 103, "Housing Balance" shall be defined as the
15 proportion of all new housing units affordable to households of extremely low, very low, low or
16 moderate income households, as defined in California Health & Safety Code Sections 50079.5 et seq.,
17 as such provisions may be amended from time to time, to the total number of all new housing units for a
18 10 year Housing Balance Period.

19 (2) The Housing Balance Period shall begin with the first quarter of year 2005 to the
20 last quarter of 2014, and thereafter for the ten years prior to the most recent calendar quarter.

21 (3) For each year that data is available, beginning in 2005, the Planning Department
22 shall report net housing construction by income levels, as well as units that have been withdrawn from
23 protection afforded by City law, such as laws providing for rent-controlled and single resident
24 occupancy (SRO) units. The affordable housing categories shall include net new units, as well as
25 existing units that were previously not restricted by deed or regulatory agreement that are acquired for

1 preservation as permanently affordable housing as determined by the Mayor's Office of Housing and
2 Community Development (MOHCD) (not including refinancing or other rehabilitation under existing
3 ownership), protected by deed or regulatory agreement for a minimum of 55 years. The report shall
4 include, by year, and for the latest quarter, all units that have received Temporary Certificates of
5 Occupancy within that year, a separate category for units that obtained a site or building permit, and
6 another category for units that have received approval from the Planning Commission or Planning
7 Department, but have not yet obtained a site or building permit to commence construction (except any
8 entitlements that have expired and not been renewed during the Housing Balance Period). Master
9 planned entitlements, including but not limited to such areas as Treasure Island, Hunters Point
10 Shipyards and Park Merced, shall not be included in this latter category until individual building
11 entitlements or site permits are approved for specific housing projects. For each year or approval
12 status, the following categories shall be separately reported:

13 (A) Extremely Low Income Units, which are units available to individuals or
14 families making between 0-30% Area Median Income (AMI) as defined in California Health & Safety
15 Code Section 50106, and are subject to price or rent restrictions between 0-30% AMI;

16 (B) Very Low Income Units, which are units available to individuals or families
17 making between 30-50% AMI as defined in California Health & Safety Code Section 50105, and are
18 subject to price or rent restrictions between 30-50% AMI;

19 (C) Lower Income Units, which are units available to individuals or families
20 making between 50-80% AMI as defined in California Health & Safety Code Section 50079.5, and are
21 subject to price or rent restrictions between 50-80% AMI;

22 (D) Moderate Income Units, which are units available to individuals or families
23 making between 80-120% AMI, and are subject to price or rent restrictions between 80-120% AMI;

24 (E) Middle Income Units, which are units available to individuals or families
25 making between 120-150% AMI, and are subject to price or rent restrictions between 120-150% AMI;

1 (F) Market-rate units, which are units not subject to any deed or regulatory
2 agreement with price restrictions;

3 (G) Housing units withdrawn from protected status, including units withdrawn
4 from rent control (except those units otherwise converted into permanently affordable housing),
5 including all units that have been subject to rent control under the San Francisco Residential Rent
6 Stabilization and Arbitration Ordinance but that a property owner removes permanently from the
7 rental market through condominium conversion pursuant to Administrative Code Section 37.9(a)(9),
8 demolition or alterations (including dwelling unit mergers), or permanent removal pursuant to
9 Administrative Code Section 37.9(a)(10) or removal pursuant to the Ellis Act under Administrative
10 Code Section 37.9(a)(13);

11 (H) Public housing replacement units and substantially rehabilitated units
12 through the HOPE SF and Rental Assistance Demonstration (RAD) programs, as well as other
13 substantial rehabilitation programs managed by MOHCD.

14 (4) The Housing Balance shall be expressed as a percentage, obtained by dividing the
15 cumulative total of extremely low, very low, low and moderate income affordable housing units (all
16 units 0-120% AMI) minus the lost protected units, by the total number of net new housing units within
17 the Housing Balance Period. The Housing Balance shall also provide two calculations:

18 (A) the Cumulative Housing Balance, consisting of housing units that have
19 already been constructed (and received a Temporary Certificate of Occupancy or other certificate that
20 would allow occupancy of the units) within the 10-year Housing Balance Period, plus those units that
21 have obtained a site or building permit. A separate calculation of the Cumulative Housing Balance
22 shall also be provided, which includes HOPE SF and RAD public housing replacement and
23 substantially rehabilitated units (but not including general rehabilitation / maintenance of public
24 housing or other affordable housing units) that have received Temporary Certificates of Occupancy
25

1 within the Housing Balance Period. The Housing Balance Reports will show the Cumulative Housing
2 Balance with and without public housing included in the calculation, and

3 (B) the Projected Housing Balance, which shall include any residential project
4 that has received approval from the Planning Commission or Planning Department, even if the
5 housing project has not yet obtained a site or building permit to commence construction (except any
6 entitlements that have expired and not been renewed during the Housing Balance period). Master
7 planned entitlements shall not be included in the calculation until individual building entitlements or
8 site permits are approved.

9 (d) **Bi-annual Housing Balance Reports.** Within 30 days of the effective date of this
10 Section 103 By June 1, 2015, the Planning Department shall calculate the Cumulative and Projected
11 Housing Balance for the most recent two quarters City-wide, by Supervisorial District, Plan Area, and
12 by neighborhood Planning Districts, as defined in the annual Housing Inventory, and publish it as an
13 easily visible and accessible page devoted to Housing Balance and Monitoring and Reporting on the
14 Planning Department's website. By August September 1st and February March 1st of each year, the
15 Planning Department shall publish and update the Housing Balance Report, and present this report at
16 an informational hearing to the Planning Commission and Board of Supervisors, as well as to any
17 relevant body with geographic purview over a plan area upon request, along with the other quarterly
18 reporting requirements of Administrative Code Chapter 10E.4. The annual report to the Board of
19 Supervisors shall be accepted by resolution of the Board, which resolution shall be introduced
20 by the Planning Department. The Housing Balance Report shall also be incorporated into the
21 Annual Planning Commission Housing Hearing and Annual Report to the Board of Supervisors
22 required in Administrative Code Chapter 10E.4.

23 (e) **Annual Hearing by Board of Supervisors.**

24 (1) The Board of Supervisors shall hold a public Housing Balance hearing on an annual
25 basis by April 1 of each year, to consider progress towards the City's affordable housing goals.

1 including the goal of a minimum 33% affordable housing to low and moderate income households, as
2 well as the City's General Plan Housing Element housing production goals by income category. The
3 first hearing shall occur no later than 30 days after the effective date of this ordinance, and by April 1
4 of each year thereafter.

5 (2) The hearing shall include reporting by the Planning Department, which shall present
6 the latest Housing Balance Report City-wide and by Supervisorial District and Planning District; the
7 Mayor's Office of Housing and Community Development, the Mayor's Office of Economic and
8 Workforce Development, the Rent Stabilization Board, by the Department of Building Inspection, and
9 the City Economist on strategies for achieving and maintaining a housing balance in accordance with
10 San Francisco's housing production goals. If the Cumulative Housing Balance has fallen below 33% in
11 any year, MOHCD shall determine how much funding is required to bring the City into a minimum
12 33% Housing Balance and the Mayor shall submit to the Board of Supervisors a strategy to accomplish
13 the minimum of 33% Housing Balance. City Departments shall at minimum report on the following
14 issues relevant to the annual Housing Balance hearing: MOHCD shall report on the annual and
15 projected progress by income category in accordance with the City's General Plan Housing Element
16 housing production goals, projected shortfalls and gaps in funding and site control, and progress
17 toward the City's Neighborhood Stabilization goals for acquiring and preserving the affordability of
18 existing rental units in neighborhoods with high concentrations of low and moderate income
19 households or historically high levels of evictions; the Planning Department shall report on current
20 and proposed zoning and land use policies that affect the City's General Plan Housing Element
21 housing production goals; the Mayor's Office of Economic and Workforce Development shall report on
22 current and proposed major development projects, dedicated public sites, and policies that affect the

1 City's General Plan Housing Element housing production goals; the Rent Board shall report on the
2 withdrawal or addition of rent-controlled units and current or proposed policies that affect these
3 numbers; the Department of Building Inspection shall report on the withdrawal or addition of
4 Residential Hotel units and current or proposed policies that affect these numbers; and the City
5 Economist shall report on annual and projected job growth by the income categories specified in the
6 City's General Plan Housing Element.

7 (3) All reports and presentation materials from the annual Housing Balance hearing
8 shall be maintained by year for public access on the Planning Department's website on its page
9 devoted to Housing Balance Monitoring and Reporting.

10
11 Section 4. Effective Date. This ordinance shall become effective 30 days after
12 enactment. Enactment occurs when the Mayor signs the ordinance, the Mayor returns the
13 ordinance unsigned or does not sign the ordinance within ten days of receiving it, or the Board
14 of Supervisors overrides the Mayor's veto of the ordinance.

15
16 APPROVED AS TO FORM:
17 DENNIS J. HERRERA, City Attorney

18 By: 
19 MARLENA BYRNE
Deputy City Attorney

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21
22
23
24
25



City and County of San Francisco

Tails
Ordinance

CITY HALL
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102-4689

File Number: 150029

Date Passed: April 21, 2015

Ordinance amending the Planning Code to require the Planning Department to monitor the balance between new market rate housing and new affordable housing, and publish a bi-annual Housing Balance Report; requiring an annual hearing at the Board of Supervisors on strategies for achieving and maintaining the required housing balance in accordance with San Francisco's housing production goals, and making environmental findings, Planning Code, Section 302, findings, and findings of consistency with the General Plan, and the eight priority policies of Planning Code, Section 101.1.

April 06, 2015 Land Use and Transportation Committee - AMENDED, AN AMENDMENT OF THE WHOLE BEARING SAME TITLE

April 06, 2015 Land Use and Transportation Committee - RECOMMENDED AS AMENDED

April 14, 2015 Board of Supervisors - PASSED, ON FIRST READING

Ayes: 11 - Avalos, Breed, Campos, Christensen, Cohen, Farrell, Kim, Mar, Tang, Wiener and Yee

April 21, 2015 Board of Supervisors - FINALLY PASSED

Ayes: 11 - Avalos, Breed, Campos, Christensen, Cohen, Farrell, Kim, Mar, Tang, Wiener and Yee

File No: 150029

I hereby certify that the foregoing Ordinance was FINALLY PASSED on 4/21/2015 by the Board of Supervisors of the City and County of San Francisco.

Angela Calvillo
Clerk of the Board

Mayor

Date Approved

**APPENDIX B
CUMULATIVE HOUSING BALANCE REPORT No 10 TABLES BY PLANNING DISTRICTS**

**Table 1A
Cumulative Housing Balance Calculation, 2012 Q1—2021 Q4**

| Planning District | Net New Affordable Housing Built | Total Entitled & Permitted Affordable Units | Units Removed from Protected Status | Total Net New Units Built | Total Entitled & Permitted Units | Cumulative Housing Balance |
|-------------------------|----------------------------------|---|-------------------------------------|---------------------------|----------------------------------|----------------------------|
| Bernal Heights | 5 | 8 | 191 | 71 | 181 | -70.6% |
| Buena Vista | 314 | 285 | 197 | 1,228 | 1,218 | 16.4% |
| Central | 42 | 10 | 326 | 393 | 368 | -36.0% |
| Downtown | 1,336 | 621 | 120 | 5,809 | 3,864 | 19.0% |
| Ingleside | 135 | 295 | 200 | 585 | 5,834 | 3.6% |
| Inner Sunset | 51 | - | 182 | 168 | 99 | -49.1% |
| Marina | 36 | 18 | 167 | 446 | 218 | -17.0% |
| Mission | 1,081 | 643 | 606 | 3,823 | 2,512 | 17.6% |
| Northeast | 424 | 220 | 314 | 1,062 | 894 | 16.9% |
| Outer Sunset | 37 | 15 | 474 | 180 | 370 | -76.7% |
| Presidio | - | - | - | - | 1 | 0.0% |
| Richmond | 97 | 23 | 537 | 387 | 682 | -39.0% |
| South Bayshore | 1,300 | 3,116 | 112 | 1,708 | 14,130 | 27.2% |
| South Central | 269 | 493 | 461 | 489 | 1,466 | 15.4% |
| South of Market | 2,849 | 3,502 | 132 | 16,595 | 16,333 | 18.9% |
| Treasure Island | - | - | - | - | - | N/A |
| Western Addition | 496 | 42 | 181 | 1,955 | 401 | 15.2% |
| Totals | 8,472 | 9,291 | 4,200 | 34,899 | 48,571 | 16.2% |

*Treasure Island developments permitted are included as part of Planning District 9 South of Market.

Table 1B
Expanded Cumulative Housing Balance Calculation, 2012 Q1—2021 Q4

| Planning District | Net New Affordable Housing Built | Acquisitions, Rehabs & Small Sites Completed | RAD & Hope SF Replacement Units | Total Entitled & Permitted Affordable Units | Units Removed from Protected Status | Total Net New Units Built | Total Entitled & Permitted Units | Expanded Cumulative Housing Balance |
|-------------------|----------------------------------|--|---------------------------------|---|-------------------------------------|---------------------------|----------------------------------|-------------------------------------|
| Bernal Heights | 5 | 58 | 268 | 8 | 191 | 71 | 181 | 58.7% |
| Buena Vista | 314 | 22 | 132 | 285 | 197 | 1,228 | 1,218 | 22.7% |
| Central | 42 | 12 | 107 | 10 | 326 | 393 | 368 | -20.4% |
| Downtown | 1,336 | 1,312 | 284 | 621 | 120 | 5,809 | 3,864 | 35.5% |
| Ingleside | 135 | - | - | 295 | 200 | 585 | 5,834 | 3.6% |
| Inner Sunset | 51 | - | 109 | - | 182 | 168 | 99 | -8.2% |
| Marina | 36 | 25 | 138 | 18 | 167 | 446 | 218 | 7.5% |
| Mission | 1,081 | 522 | 91 | 643 | 606 | 3,823 | 2,512 | 27.3% |
| Northeast | 424 | 100 | 576 | 220 | 314 | 1,062 | 894 | 51.4% |
| Outer Sunset | 37 | - | - | 15 | 474 | 180 | 370 | -76.7% |
| Presidio | - | - | - | - | - | - | 1 | 0.0% |
| Richmond | 97 | 10 | 144 | 23 | 537 | 387 | 682 | -24.6% |
| South Bayshore | 1,300 | - | 1,131 | 3,116 | 112 | 1,708 | 14,130 | 34.3% |
| South Central | 269 | 42 | 55 | 493 | 461 | 489 | 1,466 | 20.4% |
| South of Market | 2,849 | 54 | 276 | 3,502 | 132 | 16,595 | 16,333 | 19.9% |
| Treasure Island | - | - | - | - | - | - | - | N/A |
| Western Addition | 496 | 211 | 919 | 42 | 181 | 1,955 | 401 | 63.1% |
| Totals | 8,472 | 2,368 | 4,230 | 9,291 | 4,200 | 34,899 | 48,571 | 24.2% |

*Treasure Island developments permitted are included as part of Planning District 9 South of Market.

Table 2
Projected Housing Balance (Entitled, Permitted, and Under Construction Units), 2021 Q4

| Planning District | Very Low Income | Low Income | Moderate Income | TBD | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|-------------------|-----------------|--------------|-----------------|--------------|------------------------|---------------|--|
| Bernal Heights | - | - | - | 8 | 8 | 181 | 4.4% |
| Buena Vista | 101 | 47 | 14 | 123 | 285 | 1,218 | 23.4% |
| Central | - | - | - | 10 | 10 | 368 | 2.7% |
| Downtown | 331 | 202 | 7 | 81 | 621 | 3,864 | 16.1% |
| Ingleside | - | - | - | 295 | 295 | 5,834 | 5.1% |
| Inner Sunset | - | - | - | - | - | 99 | 0.0% |
| Marina | - | 6 | 6 | 6 | 18 | 218 | 8.3% |
| Mission | 89 | 285 | 18 | 251 | 643 | 2,512 | 25.6% |
| Northeast | 54 | 84 | 15 | 67 | 220 | 894 | 24.6% |
| Outer Sunset | 33 | 62 | 51 | (131) | 15 | 370 | 4.1% |
| Presidio | - | - | - | - | - | 1 | 0.0% |
| Richmond | - | 22 | - | 1 | 23 | 682 | 3.4% |
| South Bayshore | 97 | 20 | 72 | 2,927 | 3,116 | 14,130 | 22.1% |
| South Central | 289 | 130 | 86 | (12) | 493 | 1,466 | 33.6% |
| South of Market | 107 | 308 | 306 | 2,781 | 3,502 | 16,333 | 21.4% |
| Treasure Island | - | - | - | - | - | - | N/A |
| Western Addition | 7 | 18 | - | 17 | 42 | 401 | 10.5% |
| Totals | 1,108 | 1,184 | 575 | 6,424 | 9,291 | 48,571 | 19.1% |

*Treasure Island developments permitted are included as part of Planning District 9 South of Market.

Table 3
Building Permits Approved or Under Construction, 2021 Q4

| Planning District | Very Low Income | Low Income | Moderate Income | TBD | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|-------------------|-----------------|--------------|-----------------|--------------|------------------------|---------------|--|
| Bernal Heights | - | - | - | - | - | 65 | 0.0% |
| Buena Vista | 32 | 51 | 14 | - | 97 | 356 | 27.2% |
| Central | - | - | - | 5 | 5 | 154 | 3.2% |
| Downtown | 351 | 390 | 43 | (139) | 645 | 3,000 | 21.5% |
| Ingleside | - | - | - | - | - | 1,062 | 0.0% |
| Inner Sunset | - | - | - | - | - | 40 | 0.0% |
| Marina | - | - | - | - | - | 93 | 0.0% |
| Mission | 89 | 267 | 16 | 297 | 669 | 2,002 | 33.4% |
| Northeast | 54 | 107 | 15 | 62 | 238 | 417 | 57.1% |
| Outer Sunset | 33 | 62 | 51 | (134) | 12 | 242 | 5.0% |
| Presidio | - | - | - | - | - | 1 | 0.0% |
| Richmond | - | 22 | - | 1 | 23 | 316 | 7.3% |
| South Bayshore | 97 | 20 | - | 1 | 118 | 1,023 | 11.5% |
| South Central | 163 | 81 | 86 | (19) | 311 | 552 | 56.3% |
| South of Market | 145 | 339 | 278 | 997 | 1,759 | 3,755 | 46.8% |
| Treasure Island | - | - | - | - | - | - | N/A |
| Western Addition | - | 26 | - | 13 | 39 | 216 | 18.1% |
| Totals | 964 | 1,365 | 503 | 1,084 | 3,916 | 13,294 | 29.5% |

*Treasure Island developments permitted are included as part of Planning District 9 South of Market.

Table 4
Entitled Units without a Building Permit Issued, 2021 Q4

| Planning District | Very Low Income | Low Income | Moderate Income | TBD | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|-------------------|-----------------|------------|-----------------|--------------|------------------------|---------------|--|
| Bernal Heights | - | - | - | 8 | 8 | 116 | 6.9% |
| Buena Vista | 69 | - | - | 123 | 192 | 862 | 22.3% |
| Central | - | - | - | 5 | 5 | 214 | 2.3% |
| Downtown | - | 1 | - | 19 | 20 | 863 | 2.3% |
| Ingleside | - | - | - | 295 | 295 | 4,772 | 6.2% |
| Inner Sunset | - | - | - | - | - | 59 | 0.0% |
| Marina | - | 6 | 6 | 6 | 18 | 124 | 14.5% |
| Mission | - | 76 | 2 | (46) | 32 | 510 | 6.3% |
| Northeast | - | - | - | 5 | 5 | 477 | 1.0% |
| Outer Sunset | - | - | - | 3 | 3 | 128 | 2.3% |
| Presidio | - | - | - | - | - | - | N/A |
| Richmond | - | - | - | - | - | 366 | 0.0% |
| South Bayshore | - | - | 72 | 2,926 | 2,998 | 13,107 | 22.9% |
| South Central | 126 | 49 | - | 7 | 182 | 914 | 19.9% |
| South of Market | 107 | 101 | 133 | 1,784 | 2,125 | 12,578 | 16.9% |
| Treasure Island | - | - | - | - | - | - | N/A |
| Western Addition | 7 | 12 | - | 4 | 23 | 185 | 12.4% |
| Totals | 309 | 245 | 213 | 5,139 | 5,906 | 35,275 | 16.7% |

Table 5
New Housing Production by Affordability, 2012 Q1—2021 Q4

| Planning District | Extr. Low Income | Very Low Income | Low Income | Moderate Income | Middle Income | Total Affordable Units | Net New Units | Total Affordable Units as % of Net New Units |
|-------------------|------------------|-----------------|--------------|-----------------|---------------|------------------------|---------------|--|
| Bernal Heights | - | - | - | 5 | - | 5 | 71 | 7% |
| Buena Vista | - | 134 | 85 | 95 | - | 314 | 1,228 | 26% |
| Central | - | - | 18 | 24 | - | 42 | 393 | 11% |
| Downtown | 268 | 288 | 456 | 277 | 47 | 1,336 | 5,809 | 23% |
| Ingleside | - | 70 | 29 | 36 | - | 135 | 585 | 23% |
| Inner Sunset | - | 1 | 2 | 48 | - | 51 | 168 | 30% |
| Marina | - | - | - | 36 | - | 36 | 446 | 8% |
| Mission | 116 | 315 | 554 | 96 | - | 1,081 | 3,823 | 28% |
| Northeast | 18 | 247 | 81 | 78 | - | 424 | 1,062 | 40% |
| Outer Sunset | - | 2 | 2 | 33 | - | 37 | 180 | 21% |
| Presidio | - | - | - | - | - | - | - | N/A |
| Richmond | - | 37 | 12 | 48 | - | 97 | 387 | 25% |
| South Bayshore | 67 | 854 | 288 | 91 | - | 1,300 | 1,708 | 76% |
| South Central | - | 173 | 48 | 48 | - | 269 | 489 | 55% |
| South of Market | 29 | 1,059 | 1,351 | 410 | - | 2,849 | 16,595 | 17% |
| Treasure Island | - | - | - | - | - | - | - | N/A |
| Western Addition | - | 197 | 159 | 140 | - | 496 | 1,955 | 25% |
| Totals | 498 | 3,377 | 3,085 | 1,465 | 47 | 8,472 | 34,899 | 24.3% |

Table 6A
Acquisitions and Rehabilitation of
Affordable Housing, 2012 Q1—2021 Q4

| Planning District | No. of Buildings | No. of Units |
|-------------------------|------------------|--------------|
| Bernal Heights | 7 | 29 |
| Buena Vista | 3 | 17 |
| Central | 1 | 6 |
| Downtown | 16 | 1,282 |
| Ingleside | - | - |
| Inner Sunset | - | - |
| Marina | 1 | 25 |
| Mission | 24 | 403 |
| Northeast | 4 | 94 |
| Outer Sunset | - | - |
| Presidio | - | - |
| Richmond | 2 | 5 |
| South Bayshore | - | - |
| South Central | 1 | 21 |
| South of Market | 2 | 27 |
| Treasure Island | - | - |
| Western Addition | 3 | 208 |
| Totals | 64 | 2,117 |

Table 6B
Small Sites Program Acquisitions, 2014—2021 Q4

| Planning District | No. of Buildings | No. of Units |
|-------------------------|------------------|--------------|
| Bernal Heights | 7 | 29 |
| Buena Vista | 2 | 5 |
| Central | 1 | 6 |
| Downtown | 3 | 30 |
| Ingleside | - | - |
| Inner Sunset | - | - |
| Marina | - | - |
| Mission | 16 | 119 |
| Northeast | 2 | 6 |
| Outer Sunset | - | - |
| Presidio | - | - |
| Richmond | 2 | 5 |
| South Bayshore | - | - |
| South Central | 1 | 21 |
| South of Market | 2 | 27 |
| Treasure Island | - | - |
| Western Addition | 2 | 3 |
| Totals | 38 | 251 |

Table 7
RAD Affordable Units, 2015-2021 Q4

| Planning District | No. of Buildings | No. of Units |
|-------------------------|------------------|--------------|
| Bernal Heights | 2 | 268 |
| Buena Vista | 2 | 132 |
| Central | 1 | 107 |
| Downtown | 3 | 284 |
| Ingleside | - | - |
| Inner Sunset | 1 | 109 |
| Marina | 2 | 138 |
| Mission | 1 | 91 |
| Northeast | 4 | 576 |
| Outer Sunset | - | - |
| Presidio | - | - |
| Richmond | 2 | 144 |
| South Bayshore | 3 | 1,131 |
| South Central | 1 | 55 |
| South of Market | 1 | 276 |
| Treasure Island | - | - |
| Western Addition | 7 | 919 |
| Totals | 30 | 4,230 |

Table 8
Units Removed from Protected Status, 2012 Q1—2021 Q4

| Planning District | Condo Conversion | Demolition | Ellis Act | Owner Move-In | Units Removed from Protected Status |
|-------------------------|------------------|------------|--------------|---------------|-------------------------------------|
| Bernal Heights | 6 | 18 | 58 | 109 | 191 |
| Buena Vista | 5 | 3 | 73 | 116 | 197 |
| Central | 25 | 14 | 84 | 203 | 326 |
| Downtown | - | 68 | 48 | 4 | 120 |
| Ingleside | - | 35 | 35 | 130 | 200 |
| Inner Sunset | 5 | 12 | 66 | 99 | 182 |
| Marina | 11 | 4 | 38 | 114 | 167 |
| Mission | 4 | 30 | 319 | 253 | 606 |
| Northeast | 12 | 8 | 162 | 132 | 314 |
| Outer Sunset | - | 69 | 91 | 314 | 474 |
| Presidio | - | - | - | - | - |
| Richmond | 5 | 24 | 162 | 346 | 537 |
| South Bayshore | - | 11 | 15 | 86 | 112 |
| South Central | - | 55 | 71 | 335 | 461 |
| South of Market | 2 | 28 | 37 | 65 | 132 |
| Treasure Island | - | - | - | - | - |
| Western Addition | 8 | 7 | 33 | 133 | 181 |
| Totals | 83 | 386 | 1,292 | 2,439 | 4,200 |