



# COMPLIANCE WITH THE INCLUSIONARY AFFORDABLE HOUSING PROGRAM

## AFFIDAVIT PACKET

Date: January 10, 2022

All projects that include 10 or more dwelling units must participate in the Inclusionary Affordable Housing Program contained in Planning Code Sections 415 and 419. Every project subject to the requirements of Planning Code Section 415 or 419 is required to pay the Affordable Housing Fee. A project may be eligible for an Alternative to the Affordable Housing Fee. All projects that can demonstrate that they are eligible for an Alternative to the Affordable Housing Fee must provide necessary documentation to the Planning Department and Mayor's Office of Housing and Community Development.

**This Affidavit for Compliance with the Inclusionary Affordable Housing Program must be completed at least 30 days before the Planning Department and/or Planning Commission can act on the project.**

Please note that this affidavit is required to be included in Planning Commission packets and therefore, must comply with packet submittal guidelines.

The inclusionary requirement for a project is determined by four factors: 1) the tenure of the project, 2) the date that the Project Application (PRJ) was deemed complete by the Department ("PRJ accepted date"), 3) the zoning district, and 4) the project size. There are different inclusionary requirements for smaller projects (10-24 units) and larger projects (25+ units). Please use the attached charts to determine the applicable requirement.

The Charts are organized into three Sections: Section 1 applies to Rental Housing Projects with complete a PRJ accepted date on or after January 12, 2016. Section 2 applies to Ownership Housing Projects with complete a PRJ accepted date on or after January 12, 2016. Section 3 applies to "grandfathered" projects or those with a complete PRJ accepted date prior to January 12, 2016.

Sections 1 and 2 are further organized by zoning district and project size. Each Section includes the Citywide rate (Chart A) as well as unique rates for the Urban Mixed Use (UMU) District (Chart B), projects in the Mission Area Plan, SoMa NCT, or North of Market Residential Special Use District (SUD) (Chart C), and projects in the Divisadero NCT (Chart D). If there are conflicting affordability requirements, the higher requirement shall apply. The Charts are updated with the correct requirement.

For projects with complete PRJ's accepted on or after January 12, 2016 (Sections 1 and 2), the Inclusionary Affordable Housing Program requires the provision of on-site and off-site affordable units at a mix of income levels. The number of units provided at each income level depends on the project tenure, PRJ accepted date, and the applicable schedule of on-site rate increases. Income levels are defined as a percentage of the Area Median Income (AMI), for low-income, moderate-income, and middle-income units, as indicated in the Charts. Projects with a complete PRJ accepted prior to January 12, 2016 (Section 3) must provide all the inclusionary units at 55% AMI for rental, or 90% AMI for ownership.

Projects that use the HOME-SF program are subject to Inclusionary rates and affordability levels as set forth in Planning Code Section 206.34. More information can be found in the HOME-SF Supplemental Application. Projects that include on-site units to qualify for a density bonus under CA Govt. Code Section 65915 (the State Density Bonus Law) may also be able to satisfy all or part of the Affordable Housing Fee requirement, by receiving a credit for any on-site affordable units provided. This credit is calculated in accordance with Planning Code Section 415.5(g)(1)(D), referred to as the Combination Alternative. The Combination Alternative allows projects to satisfy the Inclusionary Housing requirement through a combination of payment of the fee and provision of on-site units. More information is available in Planning Director Bulletin 6 and the Individually Requested State Density Bonus Program Supplemental Application. State Density Bonus Projects must submit a State Density Bonus Affidavit in addition to this Affidavit.

## SECTION 1: RENTAL HOUSING PROJECTS WITH COMPLETE PRJ ACCEPTED ON OR AFTER JANUARY 16, 2016

### CHART A: Inclusionary Requirements for Rental Housing Projects Citywide

Rental Housing Projects with 10 - 24 units that elect the on-site alternative will provide all Affordable Units at 55% AMI.

Complete PRJ Accepted: →	1/12/16 - 12/31/17	1/1/18 - 12/31/18	1/1/19 - 12/31/19	1/1/20 - 12/31/20	1/1/21 - 12/31/21	1/1/22 - 12/31/22	1/1/23 - 12/31/23	1/1/24 - 12/31/24	1/1/25 - 12/31/25	1/1/26 - 12/31/26	On or after 1/1/27
<b>On-site</b>											
10-24 unit projects	12.0%	12.5%	13.0%	13.5%	14.0%	14.5%	15.0%	15.0%	15.0%	15.0%	15.0%
25+ unit projects	18.0%	19.0%	20.0%	20.5%	21.0%	21.5%	22.0%	22.5%	23.0%	23.5%	24.0%
55% AMI	10.0%	11.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%
80% AMI	4.0%	4.0%	4.0%	4.25%	4.50%	4.75%	5.0%	5.25%	5.50%	5.75%	6.0%
110% AMI	4.0%	4.0%	4.0%	4.25%	4.50%	4.75%	5.0%	5.25%	5.50%	5.75%	6.0%
<b>Fee</b>											
10-24 unit projects	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%
25+ unit projects	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%
<b>Off-site</b>											
10-24 unit projects	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%
25+ unit projects	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%
55% AMI	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%
80% AMI	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%
110% AMI	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%

### CHART B: Requirements for Rental Housing Projects in the UMU Districts and certain projects within the SOMA Youth and Family SUD and Western SOMA SUD

Please note that certain projects in the SOMA Youth and Family SUD and Western SOMA SUD also rely upon UMU requirements. Generally, Rental Housing Projects in the UMU that elect the on-site alternative will provide all Affordable Units at 55% AMI. If the Citywide Inclusionary Rate is higher than the UMU rate, then the Citywide rate and associated AMI tiers will apply. If the on-site rate is *italicized* in the chart below, then the Citywide rates apply, and the Project is required to provide Rental Units at the three income levels in Chart A.

Complete PRJ Accepted: →	1/12/16 - 12/31/17	1/1/18 - 12/31/18	1/1/19 - 12/31/19	1/1/20 - 12/31/20	1/1/21 - 12/31/21	1/1/22 - 12/31/22	1/1/23 - 12/31/23	1/1/24 - 12/31/24	1/1/25 - 12/31/25	1/1/26 - 12/31/26	On or after 1/1/27
<b>On-site UMU</b>											
Tier A	10-24 unit projects	14.4%	14.4%	14.4%	14.4%	14.4%	14.5%	15.0%	15.0%	15.0%	15.0%
Tier A	25+ unit projects	<i>18.0%</i>	<i>19.0%</i>	<i>20.0%</i>	<i>20.5%</i>	<i>21.0%</i>	<i>21.5%</i>	<i>22.0%</i>	<i>22.5%</i>	<i>23.0%</i>	<i>23.5%</i>
Tier B	10-24 unit projects	16.0%	16.0%	16.0%	16.0%	16.0%	16.0%	16.0%	16.0%	16.0%	16.0%
Tier B	25+ unit projects	<i>18.0%</i>	<i>19.0%</i>	<i>20.0%</i>	<i>20.5%</i>	<i>21.0%</i>	<i>21.5%</i>	<i>22.0%</i>	<i>22.5%</i>	<i>23.0%</i>	<i>23.5%</i>
Tier C	10-24 unit projects	17.6%	17.6%	17.6%	17.6%	17.6%	17.6%	17.6%	17.6%	17.6%	17.6%
Tier C	25+ unit projects	19.6%	19.6%	20.0%	20.5%	21.0%	21.5%	22.0%	22.5%	23.0%	23.5%

**Complete PRJ Accepted: →**      1/12/16 - 1/1/18 - 1/1/19 - 1/1/20 - 1/1/21 - 1/1/22 - 1/1/23 - 1/1/24 - 1/1/25 - 1/1/26 - **On or after**  
 12/31/17 12/31/18 12/31/19 12/31/20 12/31/21 12/31/22 12/31/23 12/31/24 12/31/25 12/31/26 1/1/27

<b>Fee or Off-site UMU</b>												
Tier A	10-24 unit projects	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%
Tier A	25+ unit projects	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%
Tier B	10-24 unit projects	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%
Tier B	25+ unit projects	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%
Tier C	10-24 unit projects	27.0%	27.0%	27.0%	27.0%	27.0%	27.0%	27.0%	27.0%	27.0%	27.0%	27.0%
Tier C	25+ unit projects	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%

<b>Land Dedication in UMU or Mission NCT</b>												
Tier A	10-24 unit < 30K	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%
Tier A	10-24 unit > 30K	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%
Tier A	25+ unit < 30K	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%
Tier A	25+ unit > 30K	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%
Tier B	10-24 unit < 30K	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%
Tier B	10-24 unit > 30K	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%
Tier B	25+ unit < 30K	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%
Tier B	25+ unit > 30K	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%	35.0%
Tier C	10-24 unit < 30K	45.0%	45.0%	45.0%	45.0%	45.0%	45.0%	45.0%	45.0%	45.0%	45.0%	45.0%
Tier C	10-24 unit > 30K	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%
Tier C	25+ unit < 30K	45.0%	45.0%	45.0%	45.0%	45.0%	45.0%	45.0%	45.0%	45.0%	45.0%	45.0%
Tier C	25+ unit > 30K	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%	40.0%

**CHART C: Inclusionary Requirements for Rental Housing Projects located in the North of Market Residential SUD, the Mission Area Plan, or the SOMA NCT District.**

Rental Housing Projects with 10-24 units that elect the on-site alternative will provide all Affordable Units at 55% AMI.

<b>Complete PRJ Accepted: →</b>	<b>1/12/16 - 12/31/17</b>	<b>1/1/18 - 12/31/18</b>	<b>1/1/19 - 12/31/19</b>	<b>1/1/20 - 12/31/20</b>	<b>1/1/21 - 12/31/21</b>	<b>1/1/22 - 12/31/22</b>	<b>1/1/23 - 12/31/23</b>	<b>1/1/24 - 12/31/24</b>	<b>1/1/25 - 12/31/25</b>	<b>1/1/26 - 12/31/26</b>	<b>On or after 1/1/27</b>
<b>On-site</b>											
10-24 unit projects	12.0%	12.5%	13.0%	13.5%	14.0%	14.5%	15.0%	15.0%	15.0%	15.0%	15.0%
25+ unit projects	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%
55% AMI	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
80% AMI	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%
110% AMI	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%

<b>Fee</b>											
10-24 unit projects	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%
25+ unit projects	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%

<b>Off-site</b>											
10-24 unit projects	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%
25+ unit projects	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%
55% AMI	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%
80% AMI	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%
110% AMI	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%

**CHART D: Inclusionary Requirements for all Rental Housing Projects within the Divisadero NCT with Complete PRJ on or after 10/1/18 that received a 50% upzoning or greater through Ordinance No. 127-15.**

Rental Housing Projects with 10-24 units are subject to the same regulations as projects with 25 units or more. The previous density for the Divisadero NCT was 1 unit for every 800 square feet of lot area. Consult with the Current Planner to determine if the project is subject to this requirement.

<b>Complete PRJ Accepted: →</b>	<b>10/1/18 - 12/31/18</b>	<b>1/1/19 - 12/31/19</b>	<b>1/1/20 - 12/31/20</b>	<b>1/1/21 - 12/31/21</b>	<b>1/1/22 - 12/31/22</b>	<b>1/1/23 - 12/31/23</b>	<b>1/1/24 - 12/31/24</b>	<b>1/1/25 - 12/31/25</b>	<b>1/1/26 - 12/31/26</b>	<b>On or after 1/1/27</b>
<b>On-site</b>										
10+ unit projects	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%
55% AMI	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%
80% AMI	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%
110% AMI	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%

<b>Fee or Off-site</b>										
10-24 unit projects	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%

## SECTION 2: OWNERSHIP HOUSING PROJECTS WITH COMPLETE PRJ ACCEPTED ON OR AFTER JANUARY 12, 2016

### CHART A: Inclusionary Requirements for Ownership Housing Projects Citywide

Ownership Housing Projects with 10-24 units that elect the on-site alternative will provide all Affordable Units at 80% AMI.

<b>Complete PRJ Accepted: →</b>	<b>1/12/16 - 12/31/17</b>	<b>1/1/18 - 12/31/18</b>	<b>1/1/19 - 12/31/19</b>	<b>1/1/20 - 12/31/20</b>	<b>1/1/21 - 12/31/21</b>	<b>1/1/22 - 12/31/22</b>	<b>1/1/23 - 12/31/23</b>	<b>1/1/24 - 12/31/24</b>	<b>1/1/25 - 12/31/25</b>	<b>1/1/26 - 12/31/26</b>	<b>On or after 1/1/27</b>
<b>On-site</b>											
10-24 unit projects	12.0%	12.5%	13.0%	13.5%	14.0%	14.5%	15.0%	15.0%	15.0%	15.0%	15.0%
25+ unit projects	20.0%	21.0%	22.0%	22.5%	23.0%	23.5%	24.0%	24.5%	25.0%	25.5%	26.0%
80% AMI	10.0%	11.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%	12.0%
105% AMI	5.0%	5.0%	5.0%	5.25%	5.50%	5.75%	6.0%	6.25%	6.50%	6.75%	7.0%
130% AMI	5.0%	5.0%	5.0%	5.25%	5.50%	5.75%	6.0%	6.25%	6.50%	6.75%	7.0%
<b>Fee</b>											
10-24 unit projects	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%
25+ unit projects	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%
<b>Off-site</b>											
10-24 unit projects	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%
25+ unit projects	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%
80% AMI	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%
105% AMI	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%
130% AMI	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%

### CHART B: Requirements for Rental Housing Projects in the UMU Districts and certain projects within the SOMA Youth and Family SUD and Western SOMA SUD, and the Land Dedication Alternative for the Mission NCT

Please note that certain projects in the SOMA Youth and Family SUD and Western SOMA SUD also rely upon UMU requirements. Generally, Ownership Housing Projects in the UMU that elect the on-site alternative will provide all Affordable Units at 90% AMI. If the Citywide Inclusionary Rate is higher than the UMU rate, then the Citywide rate and associated AMI tiers will apply. If the on-site rate is *italicized* in the chart below, then the Citywide rates apply, and the Project is required to provide Rental Units at the three income levels in Chart.

<b>Complete PRJ Accepted: →</b>	<b>1/12/16 - 12/31/17</b>	<b>1/1/18 - 12/31/18</b>	<b>1/1/19 - 12/31/19</b>	<b>1/1/20 - 12/31/20</b>	<b>1/1/21 - 12/31/21</b>	<b>1/1/22 - 12/31/22</b>	<b>1/1/23 - 12/31/23</b>	<b>1/1/24 - 12/31/24</b>	<b>1/1/25 - 12/31/25</b>	<b>1/1/26 - 12/31/26</b>	<b>On or after 1/1/27</b>
<b>On-site UMU</b>											
Tier A	10-24 unit projects	14.4%	14.4%	14.4%	14.4%	14.4%	14.4%	15.0%	15.0%	15.0%	15.0%
Tier A	25+ unit projects	20.0%	21.0%	22.0%	22.5%	23.0%	23.5%	24.0%	24.5%	25.0%	25.5%
Tier B	10-24 unit projects	16.0%	16.0%	16.0%	16.0%	16.0%	16.0%	16.0%	16.0%	16.0%	16.0%
Tier B	25+ unit projects	20.0%	21.0%	22.0%	22.5%	23.0%	23.5%	24.0%	24.5%	25.0%	25.5%
Tier C	10-24 unit projects	17.6%	17.6%	17.6%	17.6%	17.6%	17.6%	17.6%	17.6%	17.6%	17.6%
Tier C	25+ unit projects	20.0%	21.0%	22.0%	22.5%	23.0%	23.5%	24.0%	24.5%	25.0%	25.5%



**CHART C: Inclusionary Requirements for Ownership Housing Projects located in the North of Market Residential SUD, the Mission Area Plan, or the SOMA NCT District.**

Ownership Housing Projects with 10-24 units that elect the on-site alternative will provide all affordable units at 80% AMI.

<i>Complete PRJ Accepted: →</i>	1/12/16 - 12/31/17	1/1/18 - 12/31/18	1/1/19 - 12/31/19	1/1/20 - 12/31/20	1/1/21 - 12/31/21	1/1/22 - 12/31/22	1/1/23 - 12/31/23	1/1/24 - 12/31/24	1/1/25 - 12/31/25	1/1/26 - 12/31/26	On or after 1/1/27
<b>On-site</b>											
10-24 unit projects	12.0%	12.5%	13.0%	13.5%	14.0%	14.5%	15.0%	15.0%	15.0%	15.0%	15.0%
25+ unit projects	27.0%	27.0%	27.0%	27.0%	27.0%	27.0%	27.0%	27.0%	27.0%	27.0%	27.0%
80% AMI	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
105% AMI	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%
130% AMI	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%
<b>Fee</b>											
10-24 unit projects	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%
25+ unit projects	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%
<b>Off-site</b>											
10-24 unit projects	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%	20.0%
25+ unit projects	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%	30.0%
80% AMI	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%	18.0%
105% AMI	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%
130% AMI	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%	7.0%

**CHART D: Inclusionary Requirements for Ownership Housing Projects within the Divisadero NCT with Complete PRJ on or after 10/1/18 that received a 50% upzoning or greater through Ordinance No. 127-15.**

Ownership Housing Projects with 10-24 units are subject to the same regulations as projects with 25 units or more. The previous density for the Divisadero NCT was 1 unit for every 800 square feet of lot area. Consult with the Current Planner to determine if the project is subject to this requirement.

<i>Complete PRJ Accepted: →</i>	10/1/18 - 12/31/18	1/1/19 - 12/31/19	1/1/20 - 12/31/20	1/1/21 - 12/31/21	1/1/22 - 12/31/22	1/1/23 - 12/31/23	1/1/24 - 12/31/24	1/1/25 - 12/31/25	1/1/26 - 12/31/26	On or after 1/1/27
<b>On-site</b>										
10+ unit projects	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%	23.0%
80% AMI	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%	10.0%
105% AMI	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%
130% AMI	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%	5.0%
<b>Fee or Off-site</b>										
10-24 unit projects	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%	33.0%

## SECTION 3: INCLUSIONARY REQUIREMENTS PROJECTS WITH A COMPLETE PRJ PRIOR TO JANUARY 12, 2016.

**CHART 1-A: Inclusionary Requirements for all projects Citywide with Complete PRJ accepted before 1/12/2016**

Complete PRJ Accepted: →	Before 1/1/13	Before 1/1/14	Before 1/1/15	Before 1/1/16
<b>On-site</b>				
10-24 unit projects	12.0%	12.0%	12.0%	12.0%
25+ unit projects	12.0%	13.0%	13.5%	14.5%
<b>Fee or Off-site</b>				
10-24 unit projects	20.0%	20.0%	20.0%	20.0%
25+ unit projects at or below 120'	20.0%	25.0%	27.5%	30.0%
25+ unit projects over 120' in height*	20.0%	30.0%	30.0%	30.0%

*\*except buildings up to 130 feet in height located both within a special use district and within a height and bulk district that allows a maximum building height of 130 feet, which are subject to the requirements of 25+ unit projects at or below 120 feet.*

**CHART 1-B: Requirements for all projects in UMU Districts with Complete PRJ accepted before 1/12/2016**

Please note that certain projects in the SOMA Youth and Family SUD and Western SOMA SUD also rely upon UMU requirements.

Complete PRJ Accepted: →		Before 1/1/13	Before 1/1/14	Before 1/1/15	Before 1/1/16
<b>On-site UMU</b>					
Tier A	10-24 unit projects	14.4%	14.4%	14.4%	14.4%
Tier A	25+ unit projects	14.4%	15.4%	15.9%	16.4%
Tier B	10-24 unit projects	16.0%	16.0%	16.0%	16.0%
Tier B	25+ unit projects	16.0%	17.0%	17.5%	18.0%
Tier C	10-24 unit projects	17.6%	17.6%	17.6%	17.6%
Tier C	25+ unit projects	17.6%	18.6%	19.1%	19.6%
<b>Fee or Off-site UMU</b>					
Tier A	10-24 unit projects	23.0%	23.0%	23.0%	23.0%
Tier A	25+ unit projects	23.0%	28.0%	30.0%	30.0%
Tier B	10-24 unit projects	25.0%	25.0%	25.0%	25.0%
Tier B	25+ unit projects	25.0%	30.0%	30.0%	30.0%
Tier C	10-24 unit projects	27.0%	27.0%	27.0%	27.0%
Tier C	25+ unit projects	30.0%	30.0%	30.0%	30.0%



Complete PRJ Accepted: →

Before 1/1/13

Before 1/1/14

Before 1/1/15

Before 1/1/16

Land Dedication in UMU or Mission NCT		Before 1/1/13	Before 1/1/14	Before 1/1/15	Before 1/1/16
Tier A	10-24 unit < 30K	35.0%	35.0%	35.0%	35.0%
Tier A	10-24 unit > 30K	30.0%	30.0%	30.0%	30.0%
Tier A	25+ unit < 30K	35.0%	40.0%	42.5%	45.0%
Tier A	25+ unit > 30K	30.0%	35.0%	37.5%	40.0%
Tier B	10-24 unit < 30K	40.0%	40.0%	40.0%	40.0%
Tier B	10-24 unit > 30K	35.0%	35.0%	35.0%	35.0%
Tier B	25+ unit < 30K	40.0%	45.0%	47.5%	50.0%
Tier B	25+ unit > 30K	35.0%	40.0%	42.5%	45.0%
Tier C	10-24 unit < 30K	45.0%	45.0%	45.0%	45.0%
Tier C	10-24 unit > 30K	40.0%	40.0%	40.0%	40.0%
Tier C	25+ unit < 30K	45.0%	50.0%	52.5%	55.0%
Tier C	25+ unit > 30K	40.0%	45.0%	47.5%	50.0%

**AFFIDAVIT**

# COMPLIANCE WITH THE INCLUSIONARY AFFORDABLE HOUSING PROGRAM

**PLANNING CODE SECTION 415, 417 & 419**



**San Francisco  
Planning**

49 South Van Ness Avenue, Suite 1400  
San Francisco, CA 94103  
www.sfplanning.org

\_\_\_\_\_  
Date

I, \_\_\_\_\_,  
do hereby declare as follows:

**A** The subject property is located at (address and block/lot):

\_\_\_\_\_  
Address

\_\_\_\_\_  
Block / Lot

The subject property is located within the following Zoning District:

\_\_\_\_\_  
Zoning District

\_\_\_\_\_  
Height and Bulk District

\_\_\_\_\_  
Special Use District, if applicable

Is the subject property located in the SOMA NCT, North of Market Residential SUD, or Mission Area Plan?

Yes  No

Is the subject property located in the Divisadero NCT?

Yes  No

Is this project in an UMU Zoning District within the Eastern Neighborhoods Plan Area?

Yes \_\_\_\_\_  No

(If yes, please indicate Affordable Housing Tier)

**B** The proposed project at the above address is subject to the *Inclusionary Affordable Housing Program*, Planning Code Section 415 and 419 et seq.

The Planning Case Number and/or Building Permit Number is:

\_\_\_\_\_  
Planning Case Number

\_\_\_\_\_  
Building Permit Number

This project requires the following approval:

- Planning Commission approval (e.g. Conditional Use Authorization, Large Project Authorization)
- Zoning Administrator approval (e.g. Variance)
- This project is principally permitted.

The Current Planner assigned to my project within the Planning Department is:

\_\_\_\_\_  
Planner Name

A complete Project Application was accepted on:

\_\_\_\_\_  
Date

The project contains \_\_\_\_\_ total dwelling units and/or group housing rooms.

This project is exempt from the *Inclusionary Affordable Housing Program* because:

- This project is 100% affordable.
- This project is 100% student housing.

Is this project a HOME-SF Project?

- Yes \_\_\_\_\_  No

*( If yes, please indicate HOME-SF Tier)*

Is this project an Analyzed or Individually Requested State Density Bonus Project?

- Yes  No

**C** Please indicate the tenure of the project.

- Ownership.** The housing project consists solely of units that are condominiums, stock cooperatives, community apartments, or detached single-family homes. If Affordable Units are provided on-site or off-site, all Affordable Units will be sold as Owned Units. The applicable fee rate is the ownership fee rate.
- Rental.** The housing project shall mean a housing project consisting solely of units owned by a single entity and rented to individual tenants. If Affordable Units are provided on-site or off-site, all Affordable Units will be Rental Units. The applicable fee rate is the rental fee rate.

**D** This project will comply with the Inclusionary Affordable Housing Program by:

- Payment of the Affordable Housing Fee prior to the first construction document issuance (Planning Code Section 415.5)
- On-site Affordable Housing Alternative (Planning Code Sections 415.6)
- Off-site Affordable Housing Alternative (Planning Code Sections 415.7)
- Combination of payment of the Affordable Housing Fee and the construction of on-site or off-site units (Planning Code Section 415.5 - required for Individually Requested State Density Bonus Projects)
- Eastern Neighborhoods Alternate Affordable Housing Fee (Planning Code Section 417)
- Land Dedication (Planning Code Section 419)

The applicable inclusionary rate is:

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*On-site, off-site or fee rate as a percentage*

If the method of compliance is the payment of the Affordable Housing Fee pursuant to Planning Code Section 415.5, please indicate the total residential gross floor area in the project.

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*Residential Gross Floor Area*

**E** The Project Sponsor acknowledges that any change in the elected alternative which results in the reduction of the number of on-site affordable units or off-site affordable units following the project approval shall require public notice for a hearing and approval by the Planning Commission.

**F** The Project Sponsor acknowledges that failure to sell or rent the affordable units or to eliminate the on-site or off-site affordable units at any time will require the Project Sponsor to:

- (1) Inform the Planning Department and the Mayor's Office of Housing and Community Development and, if applicable, fill out a new affidavit;
- (2) Record a new Notice of Special Restrictions; and
- (3) Pay the Affordable Housing Fee plus applicable interest (using the fee schedule in place at the time that the units are converted from ownership to rental units) and any applicable penalties by law.

**G** Project Sponsor acknowledges that in the event that a Rental Housing Project becomes an Ownership Housing Project, the Project Sponsor shall notify the Planning Department of the conversion, and shall either reimburse the City the proportional amount of the Inclusionary Affordable Housing Fee equivalent to the then-current requirement for ownership units, or provide additional on-site or off-site affordable units equivalent to the then-current requirements for ownership units. The Project Sponsor acknowledges that any change in the elected tenure shall require public notice for a hearing and approval by the Planning Commission.

Prior to issuance of the site permit, the project sponsor shall submit an estimated construction timeline to the Department.

**H** For projects with PRJ's accepted on or after January 12, 2016, in the event that the Project Sponsor does not procure a building or site permit for construction of the principal project within 30 months of the Project's approval, the Project shall comply with the Inclusionary Affordable Housing Requirements applicable thereafter at the time the Sponsor is issued a site or building permit.

**I** If a Project Sponsor elects to completely or partially satisfy their Inclusionary Housing requirement by paying the Affordable Housing Fee, the Sponsor must pay the fee in full sum to the Development Fee Collection Unit at the Department of Building Inspection for use by the Mayor's Office of Housing prior to the issuance of the first construction document.

**J** If a Project Sponsor elects the on-site alternative, the Sponsor shall record Notice of Special Restrictions (NSR) identifying the location of the affordable units in the project. This NSR shall be recorded no later than the architectural addendum and at least 12 months prior to the first certificate of occupancy. The Project Sponsor shall submit a request for pricing determination to MOHCD at least 8 months prior to first certificate of occupancy.

**K** If a Project Sponsor elects the on-site alternative, the Project Sponsor acknowledges that the Affordable Units will remain affordable for the life of the project.

## UNIT MIX TABLES

### Number of All Units in PRINCIPAL PROJECT:

<b>TOTAL UNITS:</b>	SRO / Group Housing:	Studios:	One-Bedroom Units:	Two-Bedroom Units:	Three (or more) Bedroom Units:
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If you selected the On-site, Off-Site, or Combination Alternative, please fill out the applicable section below. The On-Site Affordable Housing Alternative is required for HOME-SF Projects pursuant to Planning Code Section 206.34. State Density Bonus Projects must select the Combination Affordable Housing Alternative. If the Project includes the demolition, conversion, or removal of any qualifying affordable units, please complete the Affordable Unit Replacement Section.

**On-site Affordable Housing Alternative** (Planning Code Section 415.6, 419.3, or 206.34): \_\_\_\_\_ % of the unit total.

### Number of Affordable Units to be Located ON-SITE:

<b>TOTAL UNITS:</b>	SRO / Group Housing:	Studios:	One-Bedroom Units:	Two-Bedroom Units:	Three (or more) Bedroom Units:
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<b>LOW-INCOME</b>	Number of Affordable Units	% of Total Units	AMI Level
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<b>MODERATE-INCOME</b>	Number of Affordable Units	% of Total Units	AMI Level
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<b>MIDDLE-INCOME</b>	Number of Affordable Units	% of Total Units	AMI Level
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**Off-site Affordable Housing Alternative** (Planning Code Section 415.7 or 419.3): \_\_\_\_\_ % of the unit total.

### Number of Affordable Units to be Located OFF-SITE:

<b>TOTAL UNITS:</b>	SRO / Group Housing:	Studios:	One-Bedroom Units:	Two-Bedroom Units:	Three (or more) Bedroom Units:
---------------------	----------------------	----------	--------------------	--------------------	--------------------------------

Area of Dwellings in Principal Project (in sq. feet):	Off-Site Project Address:
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Area of Dwellings in Off-Site Project (in sq. feet):
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Off-Site Block/Lot(s):	Motion No. for Off-Site Project (if applicable):	Number of Market-Rate Units in the Off-site Project:
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<b>AMI LEVELS:</b>	Number of Affordable Units	% of Total Units	AMI Level
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<b>AMI LEVELS:</b>	Number of Affordable Units	% of Total Units	AMI Level
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<b>AMI LEVELS:</b>	Number of Affordable Units	% of Total Units	AMI Level
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**UNIT MIX TABLES: CONTINUED**

**Combination** of payment of a **fee, on-site affordable units, or off-site affordable units** with the following distribution:  
*Indicate what percent of each option will be implemented (from 0% to 99%) and the number of on-site and/or off-site below market rate units for rent or for sale.*

1. On-Site                      % of affordable housing requirement.

Number of Affordable Units to be Located ON-SITE:					
TOTAL UNITS:	SRO / Group Housing:	Studios:	One-Bedroom Units:	Two-Bedroom Units:	Three (or more) Bedroom Units:

2. Off-Site                      % of affordable housing requirement.

Number of Affordable Units to be Located OFF-SITE:					
TOTAL UNITS:	SRO / Group Housing:	Studios:	One-Bedroom Units:	Two-Bedroom Units:	Three (or more) Bedroom Units:
Area of Dwellings in Principal Project (in sq. feet):		Off-Site Project Address:			
Area of Dwellings in Off-Site Project (in sq. feet):					
Off-Site Block/Lot(s):		Motion No. for Off-Site Project (if applicable):		Number of Market-Rate Units in the Off-site Project:	

Income Levels for On-Site or Off-Site Units in Combination Projects:			
AMI LEVELS:	Number of Affordable Units	% of Total Units	AMI Level
AMI LEVELS:	Number of Affordable Units	% of Total Units	AMI Level
AMI LEVELS:	Number of Affordable Units	% of Total Units	AMI Level
AMI LEVELS:	Number of Affordable Units	% of Total Units	AMI Level

3. Fee                              % of affordable housing requirement.

**Is this Project a State Density Bonus Project?**  Yes  No

If yes, please indicate the bonus percentage, up to 50% \_\_\_\_\_, and the number of bonus units and the bonus amount of residential gross floor area (if applicable) \_\_\_\_\_

Affordable Unit Replacement: Existing Number of Affordable Units to be Demolished, Converted, or Removed for the Project					
TOTAL UNITS:	SRO / Group Housing:	Studios:	One-Bedroom Units:	Two-Bedroom Units:	Three (or more) Bedroom Units:

**Contact Information and Declaration of Sponsor of PRINCIPAL PROJECT**

\_\_\_\_\_  
*Company Name*

\_\_\_\_\_  
*Name (Print) of Contact Person*

\_\_\_\_\_  
*Address*

\_\_\_\_\_  
*City, State, Zip*

\_\_\_\_\_  
*Phone / Fax*

\_\_\_\_\_  
*Email*

I am a duly authorized agent or owner of the subject property. I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct. I hereby declare that the information herein is accurate to the best of my knowledge and that I intend to satisfy the requirements of Planning Code Section 415 as indicated above.

**Sign Here**

Signature:

Name (Print), Title:

Executed on this day in:

Location:

Date:

**Contact Information and Declaration of Sponsor of OFF-SITE PROJECT ( If Different )**

\_\_\_\_\_  
*Company Name*

\_\_\_\_\_  
*Name (Print) of Contact Person*

\_\_\_\_\_  
*Address*

\_\_\_\_\_  
*City, State, Zip*

\_\_\_\_\_  
*Phone / Fax*

\_\_\_\_\_  
*Email*

I hereby declare that the information herein is accurate to the best of my knowledge and that I intend to satisfy the requirements of Planning Code Section 415 as indicated above.

**Sign Here**

Signature:

Name (Print), Title: