



# POLICY CREDITS AND CHARITABLE EXEMPTIONS UNDER THE TIDF IMPACT FEE PROGRAM

## INFORMATIONAL AND APPLICATION PACKET

**ATTENTION: A Project Application must be completed and/or attached prior to submitting this Supplemental Application. See the [Project Application](#) for instructions.**

For questions, you can call the Planning counter at 628.652.7300 or email [pic@sfgov.org](mailto:pic@sfgov.org) where planners are able to assist you.

**Español:** Si desea ayuda sobre cómo llenar esta solicitud en español, por favor llame al 628.652.7550. Tenga en cuenta que el Departamento de Planificación requerirá al menos un día hábil para responder.

**中文:** 如果您希望獲得使用中文填寫這份申請表的幫助，請致電628.652.7550。請注意，規劃部門需要至少一個工作日來回應。

**Filipino:** Kung gusto mo ng tulong sa pagkumpleto ng application na ito sa Filipino, paki tawagan ang 628.652.7550. Paki tandaan na mangangailangan ang Planning Department ng hindi kukulangin sa isang araw na pantrabaho para makasagot.

## WHAT ARE POLICY CREDITS?

Every year, three percent (3%) of the City's anticipated Transit Impact Development Fee (TIDF) revenue is allocated for use as "Policy Credits". Development projects that meet specific policy goals can apply for these credits and, if granted, can use them to reduce or eliminate TIDF fees that would otherwise be due. Policy Credits are granted to all projects meeting applicable criteria on a "first-come-first-served" basis until the annual Policy Credit fund is exhausted. Policy Credits are available only for projects that either (1) involve a small business or (2) would provide fewer off-street parking spaces than allowed.

## WHAT IS CONSIDERED A SMALL BUSINESS?

A small business, for purposes of this application, is a non-residential use that (1) has an existing and proposed gross square footage less than 5,000 square feet and (2) is not considered a "formula retail use" under the Planning Code. Policy Credits for small businesses are available only for the actual square footage proposed for occupancy by the small business.

## WHAT QUALIFIES A PROJECT FOR CREDITS FOR REDUCED PARKING?

Policy Credits for reduced parking are available only for projects that (1) are located in Zoning Districts with parking maximums and (2) provide ninety percent (90%) or less off-street parking than the maximum allowed. For purposes of this application, "maximum allowed" means the greatest amount of off-street parking allowed by the Planning Code for the proposed project on an as-of-right basis (i.e. without Conditional Use authorization).

## HOW AND WHEN TO APPLY FOR POLICY CREDITS?

This form must be used for any application for Policy Credits and must be submitted in full prior to the Department's approval of a Building Permit Application or the Planning Commission's action on any required entitlement application, whichever comes first.

## **WHEN ARE POLICY CREDITS APPLIED TO THE PROJECT?**

Policy credits are granted at the time of the first Planning Department or Planning Commission action on a development application for the project.

## **WHAT PROJECTS QUALIFY FOR CHARITABLE EXEMPTION?**

An exemption from the TIDF may be granted for projects located on property that is exempt from real property taxation or possessory interest taxation under California Constitution, Article XIII, Section 4, as implemented by California Revenue and Taxation Code Section 214, so long as the property continues to enjoy such tax exemption. This exemption from the TIDF shall not apply to the extent that the non-profit organization is engaging in activities falling under the Retail/Entertainment or Visitor Services economic activity categories in the new development that would otherwise be subject to the TIDF.

Additionally, if the subject property loses its exempt status within 10 years of the issuance of the project's Certificate of Final Completion and Occupancy, the project will be obligated to pay the TIDF at a rate calculated pursuant to Planning Code Section 411.8.

## **SUBMITTAL INSTRUCTIONS:**

The attached application for a Policy Credits may only be submitted in conjunction with an entitlement or Building Permit Application.



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## SUPPLEMENTAL APPLICATION

### Property Information

Project Address:

Block/Lot(s):

### Type of Policy Credit Sought

Please select only one (1) Policy Credit type and complete the supplemental information required.

#### A. Small Business

##### SMALL BUSINESS - 100% TIDF CREDIT

Is the business a formula retail business?      YES      NO

Gross square footage of space dedicated to small business:

Existing: \_\_\_\_\_ Proposed: \_\_\_\_\_

#### B. Reduced Parking

##### REDUCED PARKING - 90% TIDF CREDIT

50% OR LESS OF MAX ALLOWED

##### REDUCED PARKING - 80% TIDF CREDIT

ABOVE 50% BUT LESS THAN 60% OF MAX ALLOWED

##### REDUCED PARKING - 50% TIDF CREDIT

60% OR MORE BUT LESS THAN 75% OF MAX ALLOWED

##### REDUCED PARKING - 20% TIDF CREDIT

75% OR MORE BUT LESS THAN 90% OF MAX ALLOWED

Maximum amount of parking allowed\*: \_\_\_\_\_

Proposed amount of parking\*: \_\_\_\_\_

Percentage of maximum parking proposed: \_\_\_\_\_

\*number of spaces and/or square footage, as set forth in Planning Code §151.1

### Charitable Exemption

Is the property exempt from real property taxation or possessory interest taxation under California Constitution, Article XIII, Section 4, as implemented by California Revenue and Taxation Code Section 214?

YES      NO

If yes, please attach the appropriate documentation issued by the State, City, or relevant agency.

# APPLICANT'S AFFIDAVIT

Under penalty of perjury the following declarations are made:

- a) The undersigned is the owner or authorized agent of the owner of this property.
- b) The information presented is true and correct to the best of my knowledge.
- c) Other information or applications may be required.
- d) I hereby authorize City and County of San Francisco Planning staff to conduct a site visit of this property as part of the City's review of this application, making all portions of the interior and exterior accessible through completion of construction and in response to the monitoring of any condition of approval.
- e) I attest that personally identifiable information (PII) - i.e. social security numbers, driver's license numbers, bank accounts - have not been provided as part of this application. Furthermore, where supplemental information is required by this application, PII has been redacted prior to submittal to the Planning Department. I understand that any information provided to the Planning Department becomes part of the public record and can be made available to the public for review and/or posted to Department websites.

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Signature

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Name (Printed)

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Date

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Relationship to Project  
(i.e. Owner, Architect, etc.)

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Phone

---

Email

For Department Use Only

Application received by Planning Department:

By: \_\_\_\_\_

Date: \_\_\_\_\_

## PLANNING DEPARTMENT USE ONLY

PROPERTY ADDRESS:	BLOCK:	LOT:

### DECISION AND ALLOCATION OF POLICY CREDITS:

☐ **POLICY CREDITS ALLOCATED** - as set forth below:

☐ **REDUCED PARKING POLICY CREDITS**

Policy Credit percentage:

☐ **90%**   ☐ **80%**   ☐ **50%**   ☐ **20%**

Amount of otherwise-applicable base fee: \$ \_\_\_\_\_

Resulting amount after applying Policy Credits\*: \$ \_\_\_\_\_

☐ **SMALL BUSINESS POLICY CREDITS**

Amount of otherwise applicable base fee: \$ \_\_\_\_\_

[For area devoted to small business.]

Resulting amount after applying Policy Credits\*: \$ \_\_\_\_\_

[Small Business Policy Credits are equal to 100% of base fee]

*\* If insufficient Policy Credits are available for full allocation, indicate both the number of credits allowed and the number allocated.*

☐ **CHARITABLE EXEMPTION QUALIFIED**

☐ Verified Exemption Status of Property

Amount of otherwise-applicable base fee: \$ \_\_\_\_\_

Resulting amount after applying Charitable Exemption: \$ \_\_\_\_\_

☐ **NOT ALLOCATED OR EXEMPT** - as set forth below:

☐ Policy Credit criteria not met

☐ Pool exhausted; no Policy Credits available this annual cycle

☐ Not eligible for Charitable Exemption

Reason: \_\_\_\_\_

### CURRENT PLANNING STAFF:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

### ZONING ADMINISTRATOR OR ASSISTANT ZONING ADMINISTRATOR:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

**\*\*\*Decision not valid without BOTH signatures!\*\*\***