



JOBS-HOUSING FIT REPORT

Prepared in accordance with
San Francisco Administrative Code Section 10E.4(b)(4)

Report Year: 2020
Data Year: 2019
Publication Date: November 2021



San Francisco
Planning

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EXECUTIVE SUMMARY

This first *Jobs-Housing Fit 2020 Report* complies with San Francisco Administrative Code Section 10E.41(b)(4), Annual Jobs-Housing Report.¹ It requires that the Planning Department analyze the fit between the housing needed by workers of new jobs located in San Francisco and housing produced in San Francisco by affordability as follows.

TABLE 1: JOBS-HOUSING FIT SUMMARY

Assessments	Job Growth	Affordable Housing ¹				Above Moderate ² Housing				Total Housing			
		Need	Units	Unmet Need		Need	Units	Unmet Need		Need	Units	Unmet Need	
Historical Assessment (2009-19)	210,759	61,165	7,659	(53,506)	-87%	92,586	21,810	(70,776)	-76%	153,752	29,469	(124,283)	-81%
Future Development Assessment													
Entitled Pipeline Projects 2020-30	49,547	10,155	9,902	(253)	-2%	16,202	29,950	13,748	85%	26,357	39,852	13,495	51%
Entitled Pipeline Projects 2030+	15,086	3,462	4,787	1,325	38%	4,921	13,521	8,600	175%	8,383	18,309	9,926	118%
Long Range Projections (not in Pipeline)	33,610	8,480	4,359	(4,121)	-49%	9,848	8,965	(883)	-9%	18,328	13,324	(5,004)	-27%
Subtotal Future Development (2020+)	98,242	22,097	19,049	(3,048)	-14%	30,971	52,436	21,465	69%	53,068	71,485	18,417	35%
TOTAL 2009-2040	309,001	83,262	26,708	(56,554)	-68%	123,557	74,246	(49,312)	-40%	206,820	100,954	(105,866)	-51%

Notes:

AMI: Area Median Income.

¹ Very Low (<=50% AMI); Low (<=80% AMI); Moderate (<=120% AMI).

² Units affordable to households earning > 120% AMI.

Source: SF Planning Department.

This Jobs-Housing Fit assessment revealed the following key points, which are followed by a summary of Table 1.

- Historical Deficit.** The exceptional job growth of the historical period 2009-2019 following the Great Recession created an overall housing deficit of 124,250 units (81% of total housing unit need) and an affordable unit deficit of 53,500 (87% of affordable unit need). This deficit may be an overestimate because some job growth was filled by existing residents or by new residents who found housing in vacant units, neither needing new housing.
- Future Balance.** Anticipated future development from 2020-2040 will meet and exceed overall housing need by 18,500 units (35%) and have a substantially smaller affordable housing deficit at 3,000 units (14%).
- Overall Deficit.** Yet, the better performance expected of the growth period will not reverse the historical deficits, yielding a period total 2009-2040 deficit of 106,000 units (51%) and affordable deficit of 56,500 units (68%). Meeting this need would require increasing San Francisco's housing production many times greater than its historical production capacity (2,950 units per year, 765 affordable).
 - To 10,600 units per year for ten years for total need (106,000).

1 Ordinance No. 297-19 amended the Code in December 2019 (effective January 2020).

https://codelibrary.amlegal.com/codes/san_francisco/latest/sf_admin/0-0-0-6033#JD_10E.4.

b. To 6,100 units for ten years for affordable need (61,000)

4. **Household Income trumps individual Wages.** Since housing affordability is the product of a combination of aggregate household income and family size, not simply individual wages of individuals, the historical analysis revealed that some workers in the lowest wage quartile were part of households that could afford moderate or above moderate housing, and vice versa. However there is somewhat of an upward bias in actual household incomes as compared to individual wage quartiles; for instance over 36% of all households formed by workers in the lowest wage quartile were Above Moderate income households, whereas about 28.5% of all the households formed by workers in the highest wage quartile were in the three Below Moderate income (i.e. “affordable”) categories combined.

Overall, from 2009-2040, the Jobs-Housing Fit Report finds that San Francisco will have an unmet total need for 106,000 units (51%), an unmet affordable need for 56,500 units (68 %), and an unmet above moderate need for 49,500 units (40%) after adding 309,000 jobs with a need for 207,000 units (83,350 affordable) and producing 101,000 units (26,500 affordable).

The historical period (2009-19) will have performed worse than anticipated growth (2020-2040) with an unmet total need for 124,250 units (81%), an unmet affordable need for 53,500 units (87%), and an unmet above moderate need for 71,000 units (76%) after adding 211,000 jobs with a need for 154,000 housing units (61,250 affordable) and producing 29,500 units (7,500 affordable).

In contrast, the future period 2020-2040 is expected to perform better than the historic period, with total need met and exceeded by 18,500 units (35%), a small unmet need of 3,000 units (14%), and above moderate unit need met and exceeded by 21,500 units (69%) after adding 98,000 jobs with a need for 53,000 units (22,000 affordable) and producing 71,500 units (19,000 affordable).

INTRODUCTION

This first *Jobs-Housing Fit 2020 Report* complies with San Francisco Administrative Code Section 10E.41(b)(4), Annual Jobs-Housing Report.² It requires that the Planning Department analyzes the fit between the housing needed by workers of new jobs located in San Francisco and housing produced in San Francisco by affordability.

The Methods section summarizes the data and methods used. The Results section summarizes the data and key findings. Appendix 1 contains the text of the Section 10E.41(b)(4). The Planning Department designed this report and its method to meet the Administrative Code's requirements (Section 10E.41(b)(4)).

The Administrative Code states the report's purpose as providing Planning Commissioners with additional information to consider during their annual April review of housing data related to the Planning Department's publication of the Annual Housing Inventory report. In summary, the Administrative Code (Section 10E.41(b)(4)) requires a needs estimate of housing, by household affordability level, associated with job growth located in San Francisco net of San Francisco's housing production. In addition, as specified in the Administrative Code Section 10E.41(c)(1)(C), the Planning Department, in consultation with the Mayor's Office of Housing and Community Development (MOHCD), will prepare a separate memo that describes how the City will meet its total past and projected affordable housing needs in San Francisco as estimated in this Report in terms of required sites, funding, and timing.

Specifically, Administrative Code Section 10E.41(b)(4) requires the Planning Department to analyze the number, types, and wage distribution by quartile of jobs created or lost in the City and estimate housing needs associated with those jobs. It shall then compare those housing needs by wage quartiles to actual housing production in San Francisco by affordability levels, i.e., the "Jobs-Housing Fit," assessed as follows:

1. *An Historical Ten-Year Retrospective.* Assess the Jobs-Housing Fit in the City for the preceding ten years through the end of the preceding calendar year.
2. *Pipeline Projection.* Forecast the expected Jobs-Housing Fit for the current pipeline of entitled projects, including commercial and housing development projects limited to those that have (a) received their first building or site permit, or (b) have received only planning approval. Conduct this assessment separately for two periods of growth: (i) development expected to be completed within 10 years (by 2030 for this analysis), and (ii) development expected to be completed thereafter (2030+ for this analysis).
3. *Area Plans and Major Projects.* Assess the jobs-housing fit of ". . . each draft area plan and major commercial or mixed-use development project larger than two acres subject to a development agreement under consideration or approved in the previous two years."

In addition, the Planning Department added a fourth assessment for context: an assessment of the Regional Agency's long-range projections, 2020-40, for San Francisco.

The Administrative Code also provides guidance on method, as follows:

² Ordinance No. 297-19 amended the Code in December 2019 (effective January 2020).
https://codelibrary.amlegal.com/codes/san_francisco/latest/sf_admin/0-0-0-6033#JD_10E.4.

1. The Report shall use available and relevant data from regularly published sources on jobs, wages, commercial and housing production, project approvals, standard assumptions for jobs per square foot by industry type, occupations and wage distribution by quartile associated with those industry types, workers per household and household size, and shall use the household income classifications expressed in the Housing Element of the General Plan.
2. For the Pipeline Projections Assessment, the projection shall use the affordability levels associated with entitled housing developments, including on-site inclusionary units.

METHODOLOGY

The Department created the analytical method used in this Jobs-Housing Fit report to estimate housing need associated with employment growth because there were no standard methods available. The three primary steps vary by each assessment (Historical Ten-Year Retrospective; Pipeline Projections; Area Plan & Major Projects; and the Long-Range Projections), as follows.

1. Calculate SF EMPLOYMENT CHANGE for employed persons with jobs located in San Francisco (SF Workers).
2. Estimate SF WORKER HOUSEHOLDS formed and associated HOUSING NEED by affordable housing group. The method matches each household to a housing affordability group defined by household income area median income (AMI) by household size.
3. Estimate SF Worker HOUSING NEED UNMET by San Francisco PRODUCTION by affordability group after subtracting the number of housing units produced in San Francisco from need by affordability group.

Different techniques are available for estimating an area's worker housing need. A key requirement is not estimating housing affordability solely in terms of worker wage or income of an individual. Housing is not purchased based on individual wage or income, but on the income of a *household*, most of which have more than one worker. Thus, total household income must be summed across all workers in the household, then, in combination with household size, matched to the corresponding area median income to estimate housing affordability for a household (see Table 2).

TABLE 2: HOUSING AFFORDABILITY GROUP MAXIMUM QUALIFYING AREA MEDIAN INCOME (AMI) 2017

AMI Groups	AMI ¹	Number of Persons in Household								
		1	2	3	4	5	6	7	8	9
Very Low	50%	\$40,350	\$46,150	\$51,900	\$57,650	\$62,250	\$66,900	\$71,500	\$76,100	\$80,700
Low	80%	\$64,550	\$73,800	\$83,000	\$92,250	\$99,600	\$107,000	\$114,350	\$121,750	\$129,100
Moderate	120%	\$96,850	\$110,700	\$124,500	\$138,350	\$149,400	\$160,500	\$171,550	\$182,650	\$193,700

Notes:

¹ AMI: Area Median Income.

Source: San Francisco Mayors Office of Housing and Community Development; SF Planning.

The SF Administrative Code governing this report includes the following specific conditions.

1. Assess worker housing need for jobs located only in San Francisco.
2. Assess net need for housing based on housing produced only in San Francisco.
3. Assess need for two periods:
 - a. Historical employment change from 2009-2019.
 - b. Future employment change based on two groups of the Planning Department's pipeline of entitled projects: number of units built between 2020-30 and after 2030.

4. Assess need by the four affordability groups of the San Francisco General Plan (Very Low <50% of Area Median Income (AMI); Low <80% AMI; Moderate <120% AMI; Above Moderate >120% AMI).
5. Assess need by wage quartiles (lowest, low, high, and highest), that is four groups each representing 25% of the employment change formed from a list of workers sorted from lowest to highest wages.
6. Provide the SF worker housing needs assessment for five different views of SF employment growth, as follows:
 - c. The ten-year historical period 2009-19.
 - d. Entitled pipeline projects production expected by 2030.
 - e. The residual production from entitled pipeline projects expected after 2030.
 - f. Each major project proposed or adopted within the past two years on sites greater than two acres and with a development agreement.
 - g. Each Area Plan proposed or adopted within the past two years.
7. For context, SF Planning added a sixth view: need and production from adopted long-range projections (2020-2040) not accounted for in the pipeline.

The following two sections describe the varied steps, data, and methods used for the historical ten-year retrospective assessment and those used for the five futures assessments.

Historical Ten-Year Retrospective Assessment

The large change in employment from 2009-2019 following the lowest point of the Great Recession may overstate the need for net new housing. Some of the job growth was not net new employment, but replacement jobs that already existed prior to the Great Recession. Some of the jobs were filled by workers already living in the Bay Area, and therefore do not need a new housing unit. Some of the workers filling new jobs would be new to the region but find residence in existing vacant units. Ideally, the historical job change would be refined to isolate net new jobs filled by new workers to the region without use of existing residences, that is those who generate the need for additional housing. The Planning Department was not able to credibly estimate the magnitude and characteristics of these over- and under-estimates at this time, as it is unavailable in easily readable data and beyond the scope of this Report.

The primary data, methods, and steps used to execute the general methods described above for the Ten-Year Retrospective Assessment are as follows.

1. Calculate EMPLOYMENT CHANGE (2009-2019) by wage quartile for employed persons with jobs located in San Francisco.
 - a. Download the Bureau of Labor Statistics' Quarterly Census of Employment & Wages (QCEW) data, for SF County, 2009 & 2019 at the NAICS three-digit level of economic sectors.
 - b. Sort year 2019's sector records by NAICS average wage, low to high.

- c. Create wage quartiles in the 2019 data defined by a new field (WageQ) with ordinal values--lowest, low, high, highest--based on the cumulative employment total representing 25 percent of total employment per quartile when the data is sorted from lowest to highest on average wage.
 - d. Create Wage Quartiles in 2009 data by joining 2019 WageQ field on year 2009 NAICS 3-digit sectors (after creating a 2019-2009 NAICS crosswalk to resolve any changes in sectors between the 2009 and 2019 NAICS classification system). This step holds the Wage Quartiles constant over time so that the 2009-19 change reflects real employment change within the quartiles as opposed to definitional changes of industrial sectors.
 - e. Sum Wage Quartiles for 2009 & 2019
 - f. Calculate EMPLOYMENT CHANGE 2009-19 by quartile by subtracting 2009 from 2019.
2. Estimate TOTAL SF WORKER HOUSEHOLDS and HOUSING NEED associated with the employment change of Step 1 and assess that need by wage quartile and affordable housing level.
 - a. Estimate SF Worker Households from the 2017 five-year 5% ACS IPUMS national sample by selecting all households in the San Francisco Bay Area that have at least one member holding a job located in San Francisco, including fields with household income and NAICS sector.
 - b. Construct the wage quartile field in the IPUMS data from the QCEW data by matching QCEW 2019-year wage quartile field to the IPUMS data using NAICS 3-digit fields common to both data sets.
 - c. Construct an area median income (AMI) Group field in the IPUMS data using the IPUMS household income data for each record and the associated AMI Categories from the Mayor's Office of Housing annual tables on qualifying incomes for the different AMI categories of household income and household size (see Table 2).
 - d. Create a table of households by wage quartile by AMI group of SF Worker Households residing in the Bay Area with one or more workers holding a job located in San Francisco.
 - e. Create a frequency distribution table from the table in step 2d of SF worker households by wage quartile and AMI group.
 - f. Create 2009-19 Housing Need Table. Use the "share" or "frequency distribution" table from Step No. 2e to distribute the 2009-19 QCEW employment change by wage quartiles to the households they form by AMI Housing Affordability groups.
3. Estimate SF Worker HOUSING NEED UNMET BY SAN FRANCISCO PRODUCTION by affordability group after accounting for housing production in San Francisco by affordability group.
 - a. Create 2009-19 Unmet Housing Need Table. Estimate net need by subtracting SF housing production by AMI group (SF Housing Inventory data) from total need.

Futures Assessment

The other required jobs-housing fit assessment is that of future housing need from future employment growth. The source of future growth defined by the Administrative Code is that from San Francisco Planning Department's projections of the entitled projects in its development "pipeline" database in two separate time periods based on when units would be completed (2020-30 and 2030+). Also requested is an assessment of each area plan and major project with sites greater than two acres and development agreements proposed or approved within the past two years. In addition, the Planning Department added an assessment of San Francisco's adopted long-range growth projections (not accounted for by the pipeline) for context and to supplement that limited view of the projected future provided by using only pipeline data.

The methodology used for the futures assessments follows the same three primary steps as that used for the historical assessment, but the secondary steps vary because the source and type of data is different. Instead of actual past employment data, we have various formulations of future *development* data, mostly in terms of square feet (not jobs) by type of land use (residential units & commercial square feet). Commercial development is given in SF Planning's six land use sectors (SF6). The SF6 combines land use and economic activity to produce six fundamental types of land use and economic activity that correspond to a building type for policy planning purposes: office, retail, cultural/institutional/educational (CIE) campus, medical campus, visitor, and San Francisco's industrial category of production, repair, and distribution (PDR). This land use data is transformed into jobs using the Department's standard employment density factors. The jobs by sector are transformed into households by AMI Group using factors developed in San Francisco's 2019 Jobs-Housing Nexus Analysis.³ It is not possible to develop the futures analysis by wage quartile, as was done with the historical analysis; nor is it necessary to develop wage quartile information to meet the fundamental purpose of the Jobs-Housing analysis: estimating housing need for new SF workers by household AMI. The adopted 2019 Jobs-Housing Nexus Analysis provides the direct conversion factors from land use type to household AMI without providing the granular intermediary data steps that include wage data.

The primary steps of the futures assessment are as follows.

1. Step 1: Estimate employment change from net new square feet by SF6 sector or employment projections. When data is given in gross square feet, use standard analytic employment density factors (Table 2) for San Francisco to estimate employment from projected development by land use. If data is already given as jobs by land use, as it is with the long-range projections, simply use it, but also estimate square footage by sector for use in estimating households

TABLE 3: EMPLOYMENT DENSITY FACTOR – SQUARE FOOT PER JOB

	Square Feet per Job					
	Office	Retail	Cultural	Visitor	Medical	PDR
Factors	240	350	350	440	350	570
Source: San Francisco Planning Department						

3 Keyser Marston Associates, *Jobs Housing Nexus Analysis*, San Francisco California, prepared for the City & County of San Francisco, May 2019, Table III-5 New Worker Households by Income Level per 100,000 Square Feet, p 13.

2. Step 2: Estimate SF Worker Households and Housing Need associated with employment growth by housing affordability groups using the household formation factors (Table 4).

TABLE 4: SF WORKER HOUSEHOLD FORMATION BY SF WORKER

AMI Group	San Francisco Household Formation per 100,000 sq. ft.					
	Office	Retail	Cultural	Visitor	Medical	PDR
Very Low (<=50%AMI)	17.6	40.6	9.7	17.4	14.1	16.9
Low (50-80% AMI)	24.3	31.3	10.7	17.9	22.3	17.7
Moderate (80-120%AMI)	39.0	30.3	12.8	16.3	32.2	18.6
Above Moderate	160.8	54.1	24.3	21.4	95.7	43.2

Source: Keyser Marston Associates, Jobs Housing Nexus Analysis, San Francisco, May 2019, Table III-5, p 13; and San Francisco Planning Department.

3. Step3: Estimate future SF Worker's need unmet by San Francisco housing production by affordability group after accounting for housing production in San Francisco (only, not elsewhere).
 - a. Develop a frequency distribution Table of future affordable unit production by AMI affordability categories from the Mayor's Office of Housing and Community Development's Affordable Housing Pipeline (Table 5), the AMI Frequency Distribution Table.

TABLE 5: AFFORDABLE HOUSING PIPELINE

Units	General Plan Housing Affordability Categories					Total
	Lowest <50% AMI	Low 80% AMI	Moderate <120% AMI	Subtotal Affordable	Above Moderate	
Number	4,347	4,991	1,772	11,110	22,847	33,957
Share <120% AMI	39%	45%	16%	100%		
Share Total	13%	15%	5%	33%	67%	100%

Notes:

AMI: Area Median Income.

Source: San Francisco Planning Department.

- b. Use the AMI Group frequency distribution table to estimate affordable housing production by AMI groups from the total affordable housing estimate given in the future development data (pipeline, DA, Area Plan, Projections). The standard data available for pipeline projects includes total proposed affordable units, but does not include detailed data broken down by AMI category. The MOHCD maintains a database of housing pipeline projects for which proposals of affordable housing production by AMI group are available, but not for *all* pipeline projects, Area Plans, or the future projections. (The MOHCD database only includes about 34,000 out of the over 58,000 units in the pipeline). Thus, the above methodology using share of affordable housing production by AMI group from MOHCD's pipeline database applied to the full pipeline is the best available and reasonable information to use for this Jobs-Housing Fit futures assessment.
 - c. Develop one jobs-housing fit table for each required assessment based on the steps and sub-steps above, as follows.

- i. Square feet of development proposed per assessment by SF's Sectors
- ii. Total Jobs per sector derived from the SF employment density factors.
- iii. Household Formation = Housing Need by AMI Group
- iv. Housing production by AMI group.
- v. Balance of exceeded or unmet need after subtracting housing production from housing need by AMI category.

A Note on Differing Methodologies to Retrospective and Futures Assessments

This Jobs-Housing Fit Report uses two different methodologies to meet the Administrative Code's requirements in computing the retrospective assessment and the future-looking assessments. The methodologies vary because the basis of the available data for each is different and the question is different – one is a measurement of actual past conditions, and the other is a projection of hypothetical future conditions. The historical assessment has the advantage of analyzing data of real conditions instead of having to estimate future jobs. It analyzes real jobs that existed in the past and the associated real change. The historical assessment uses primary source data for jobs and their wages, which is the U.S. BLS/QCEW, and for actual household formation by workers and their actual household incomes, whose source is the U.S. Census PUMS. For the futures analysis, the legislation directs the report to base its analysis on new non-residential construction, and so it must use a method that starts with land use as the basis for projecting jobs and households by income. This distinction is the fundamental point of departure for the methodological differences. The City already has a methodology in place for connecting future job growth by land use to household formation by household income. That methodology was developed in the Jobs-Housing Nexus Study recently adopted by the Board of Supervisors. While this methodology does not permit us at this time to provide wage quartiles associated with the future jobs and households, the wage quartile information is a secondary and unnecessary point of relevance for essential task of a Jobs-Housing Fit analysis, which is to project the housing demand by household income for projected job growth. The nexus study methodology provides a direct path to answer the core question of housing demand by income associated with job growth.

Total Housing Need

Although not explicitly required in the Administrative Code, standard analytic practice would presume that a statement of total need would be expected for this Jobs-Housing Fit analysis. Because the different assessment, or “views,” of future jobs-housing fit required by the Administrative Code contain overlapping data on the same projects, calculating total need for the futures period or for the historical plus future period requires understanding this overlap and adjusting for the double counting that would result.

The source of the double counting is the presence of some of the same pipeline projects in each of the “views” for which the Administrative Code requires a jobs-housing assessment. For instance, the subset of major projects with development agreements are also pipeline projects. Some pipeline projects are contained in the total capacity estimated for area plans. The development represented by the pipeline

projects and area plans is part of the capacity used in the long-range projections. Thus, one cannot simply sum the totals of each of the views to produce total need without double counting.

Thus, a final task of the jobs-housing fit assessment is to create meaningful sums for the historical period, the futures period and the total across both the historical and futures periods. The historical period contains no potential for double counting with the future. The futures period is completely represented by the pipeline views (2020-30 & 2030+) and the long-range projections 2020-2040 greater than the pipeline. Thus, the total for the futures period is best represented by the two pipeline periods plus the residual of the long-range projections not accounted for by pipeline development. The total for the whole period, 2009-2040 is constructed from the sum of the historical period total and that of the futures' two pipeline views and long-range projections residual (see Table 1: Jobs-Housing Fit Summary, above, and Table 6: San Francisco Jobs-Housing Fit Assessment Summary 2009 – 2040). The data by wage quartile are presented only for the Historical Assessment, since it is possible to construct wage quartiles with the readily available historical data, but not with the readily available project-based growth data or long-range projections.

FINDINGS

Summary

This section presents the results of the assessments required by the San Francisco Administrative Code Section 10E.41(b)(4), Annual Jobs-Housing Fit Report, as described in detail in the Introduction above.

As an overview of the complete Jobs-Housing Fit assessments, Table 6 summarizes the results by each assessment for affordable housing by General Plan category and in total. Subsequent tables present the detailed Jobs-Housing Fit assessments by affordability categories for the assessments.

The only difference between Table 1: Executive Summary Jobs-Housing Fit Assessment, above, and Table 6 is the inclusion of data for the AMI affordability categories.

TABLE 6: SUMMARY--SAN FRANCISCO JOBS-HOUSING FIT NEED, PRODUCTION, BALANCE (2009 - 2040)

Table 6a: SF Worker Housing NEED

Assessments	SF Job Growth	Affordable Housing Categories				Above Moderate	Total Housing
		Very Low < 50% AMI	Low < 80% AMI	Moderate < 120% AMI	Subtotal		
Historical (2009-19)	210,759	17,886	17,710	25,569	61,165	92,586	153,752
Future (2020-40)							
Entitled Pipeline Projects 2020-30	49,547	2,612	3,103	4,440	10,155	16,202	26,357
Entitled Pipeline Projects 2030+	15,086	979	1,056	1,427	3,462	4,921	8,383
Major Projects w Development Agreements	27,859	1,539	1,813	2,627	5,979	9,813	15,792
Area Plans	34,339	1,530	2,037	3,181	6,748	12,781	19,529
Long Range Projections (not in Pipeline)	33,610	2,383	2,723	3,374	8,480	9,848	18,328
<i>Future Subtotal</i>	<i>98,242</i>	<i>5,974</i>	<i>6,882</i>	<i>9,241</i>	<i>22,097</i>	<i>30,971</i>	<i>53,068</i>
TOTAL 2009-2040	309,001	23,860	24,592	34,810	83,262	123,557	206,820

Notes:

AMI: Area Median Income.

To correct double counting, the Future Subtotal sums both Pipeline Assessments and Long Range Projections not in Pipeline.

Source: San Francisco Planning Department.

Table 6b: SF Housing PRODUCTION

Assessments	SF Job Growth	Affordable Housing Categories				Above Moderate	Total Housing
		Very Low < 50% AMI	Low < 80% AMI	Moderate < 120% AMI	Subtotal		
Historical (2009-19)	210,759	3,641	2,494	1,524	7,659	21,810	29,469
Future (2020-40)	0						
Entitled Pipeline Projects 2020-30	49,547	3,874	4,448	1,579	9,902	29,950	39,852
Entitled Pipeline Projects 2030+	15,086	1,873	2,151	764	4,787	13,521	18,309
Major Projects	27,859	1,183	1,358	482	3,023	6,273	9,296
Area Plans	34,339	1,269	1,456	517	3,242	7,202	10,444
Long Range Projections (not in Pipeline)	33,610	1,706	1,958	695	4,359	8,965	13,324
<i>Future Subtotal</i>	<i>98,242</i>	<i>7,453</i>	<i>8,557</i>	<i>3,038</i>	<i>19,049</i>	<i>52,436</i>	<i>71,485</i>
TOTAL 2009-2040	309,001	11,094	11,051	4,562	26,708	74,246	100,954

Notes:

AMI: Area Median Income.

To correct double counting, the Future Subtotal sums both Pipeline Assessments and Long Range Projections not in Pipeline.

Source: San Francisco Planning Department.

Table 6c: SF Worker Housing UNMET NEED

Assessments	SF Job Growth	Affordable Housing Categories				Above Moderate	Total Housing
		Very Low < 50% AMI	Low < 80% AMI	Moderate < 120% AMI	Subtotal		
Historical (2009-19)	210,759	(14,245)	(15,216)	(24,045)	(53,506)	(70,776)	(124,283)
<i>As share of total need</i>		<i>-80%</i>	<i>-86%</i>	<i>-94%</i>	<i>-87%</i>	<i>-76%</i>	<i>-81%</i>
Future (2020-40)							
Entitled Pipeline Projects 2020-30	49,547	1,262	1,345	(2,861)	(253)	13,748	13,495
Entitled Pipeline Projects 2030+	15,086	894	1,095	(663)	1,325	8,600	9,926
Major Projects	27,859	(356)	(455)	(2,145)	(2,956)	(3,540)	(6,496)
Area Plans	34,339	(261)	(581)	(2,664)	(3,506)	(5,579)	(9,085)
Long Range Projections (not in Pipeline)	33,610	(677)	(765)	(2,679)	(4,121)	(883)	(5,004)
<i>Future Subtotal</i> ¹	<i>98,242</i>	<i>1,479</i>	<i>1,675</i>	<i>(6,203)</i>	<i>(3,048)</i>	<i>21,465</i>	<i>18,417</i>
<i>As share of total need</i>		<i>25%</i>	<i>24%</i>	<i>-67%</i>	<i>-14%</i>	<i>69%</i>	<i>35%</i>
TOTAL 2009-2040	309,001	(12,766)	(13,541)	(30,248)	(56,554)	(49,312)	(105,866)
<i>As share of total need</i>		<i>-54%</i>	<i>-55%</i>	<i>-87%</i>	<i>-68%</i>	<i>-40%</i>	<i>-51%</i>

Notes:

AMI: Area Median Income.

¹ To correct double counting, the Future Subtotal sums both Pipeline Assessments and Long Range Projections not in Pipeline.

Source: San Francisco Planning Department.

Highlights

The future 2020-40 period is projected to perform better in meeting housing need than the historical period 2009-2019, although not enough to reverse the historical deficits.

- The future 2020-40 period is projected to fully meet SF worker housing need and exceeded it by 18,500 units or 35 percent of need (53,100), with the affordability deficit reduced substantially to 3,000 units or 14 percent of need (22,100).

- In comparison, the historical period from 2009-19 had an 81 percent deficit (124,250 units) in meeting total housing need (154,000 units) and an 87 percent deficit (53,500 units) in meeting affordable housing need (61,000).

Detail

Table 6a-c summarizes the results for the whole combined historical and future periods from 2009 to 2040.

1. San Francisco has an historical housing need from 2009-2019 for 124,000 more units than the market produced in San Francisco (53,500 affordable), as follows:
 - a. Employment growth from 2009-19 of 211,000 jobs following the historical job losses of 2009 during the depths of the Great Recession;
 - b. Formation of 154,000 households needing 154,000 housing units associated with that employment growth (61,000 affordable);
 - c. Production of 29,500 housing units in San Francisco (7,700 affordable).
2. The future housing need from 2020-2040 (53,000) will be met and exceeded by about 18,500 units, but the affordable housing need (19,000) will continue a deficit, but substantially smaller at 3,000 units (14% of need) as follows:
 - a. Future growth of 98,250 jobs;
 - b. Formation of 53,000 households needing 53,000 housing units associated with that employment growth (22,000 affordable);
 - c. Production of 71,500 housing units in San Francisco (19,000 affordable).
3. Total Period housing need 2009-2040 from a combined ten-year historical plus future housing need for 124,000 more units than the 101,000 expected to be produced (affordable need for 65,500 more units than the 26,729 units expected to be produced), as follows:
 - a. Growth of 309,000 jobs;
 - b. Formation of 210,000 households needing 210,000 housing units associated with that employment growth (83,500 affordable);
 - c. Production of 101,000 housing units in San Francisco (26,700 affordable).

Considering the data in Table 6 further leads to the following points.

1. The 56,500-unit affordable housing deficit from 2009-2040 is high, at 68 percent of need (83,500). This estimate may be an over-estimate given the extraordinary period of growth the data represents, from the bottom of the Great Recession (2008-2009) to the end of pre-pandemic 2019). The dislocation of the Great Recession meant that some of the subsequent job growth was filled by unemployed residents of the region whose need for housing is already met. Some of those jobs were filled by new residents to the region who met their housing need with an existing vacant unit. It is likely that this portion of net new

demand for housing captured in the data is not substantial, but it may not be trivial either. Unfortunately, the readily available data does not allow for precisely estimating its magnitude, though note that San Francisco lost approximately 30,000 jobs during the Great Recession and its unemployment rate went from a high of 9.8% in 2009 to a low of 2.0% in 2019.

2. There will be a 49,500-unit deficit of Above Moderate rate need (40 percent of need, 123,500) over the 2009-2040 period. Should that need be met by the market under existing inclusionary housing requirements (approximately 20%), this would also produce over 12,000 additional affordable units, which is close to a quarter (over 22%) of the unmet need for Affordable units over the 2009-2040 period.

The Historical Ten-Year Retrospective Assessment (2009-19)

The ten-year employment growth from jobs located in San Francisco County from 2009-2019 totaled 210,759 jobs, rounded to 211,000 jobs. It reflects the extraordinary job growth from the bottom of the Great Recession (Dec. 2008 – June 2009) through the peak of the 2019 economy before reversing from the Covid 19 Pandemic’s economic contraction beginning in early 2020.

In terms of housing need and production, both total affordable units and the Above Moderate Category were substantially underproduced (7,700 and 22,000, respectively) relative to need (61,000 and 92,500). The ten-year period ended with a deficit of 53,500 affordable units and 71,000 Above Moderate- rate units. This unmet need in San Francisco is met through overcrowding in San Francisco residences or finding a residential location in the wider Bay Area housing market (or beyond).

Table 7 summarizes the Historical Assessment 2009-2019. The key points are as follows.

1. Growth of 211,000 jobs located in San Francisco.
2. Associated TOTAL housing need of 154,000 units.
3. Associated AFFORDABLE housing need of 61,000 units (40% of 154,000 total housing need) in the following affordability categories:
 - a. Lowest (<50% AMI): 18,000 units needed (12% of total housing need)
 - b. Low (<80% AMI): 18,000 units needed (12% of total housing need)
 - c. Moderate (<120% AMI): 25,500 units needed (17% of total housing need).
4. SF production of 29,500 TOTAL units (19% of 154,000 total needed) and 7,700 AFFORDABLE units (13% of total 61,000 affordable units needed).
 - a. Lowest (<50% AMI): 3,640 units produced (20% of 17,900 needed)
 - b. Low (<80% AMI): 2,500 units (14% of 17,700 needed)
 - c. Moderate (<120% AMI): 1,525 units (6% of the 25,600 needed).
 - d. Above Moderate (>120% AMI): 21,800 units (24% of the 92,586 needed)
5. A resulting TOTAL 10-year historical unmet housing need of 124,000 units or 81 percent total need, or 154,000 needed):

6. A resulting 10-year historical unmet need of 53,500 AFFORDABLE units (88 percent of the 61,000 units of affordable need).
7. Meeting this need would have required increasing the San Francisco's housing production many times greater than its historical production capacity.
 - a. Meeting the total need for 154,000 units would require production of 15,400 units per year, or more than 5-times the ten-year average production of 2,950 units per year.
 - b. Meeting the affordable housing need for 61,000 units would require production of 6,100 units per year, or more than 8-times the ten-year average production of 765 units per year.

TABLE 7: HISTORICAL TEN-YEAR RETROSPECTIVE ASSESSMENT (2010-2009)

Wage Quartiles	Employment Change	Housing Need					
		Lowest < 50% AMI	Low < 80% AMI	Moderate <120% AMI	Total Affordable	Above Moderate	TOTAL
Lowest	39,921	6,595	4,981	5,270	16,846	9,616	26,462
Low	31,827	3,868	3,591	4,286	11,746	10,548	22,293
High	22,143	1,904	2,221	3,260	7,385	9,269	16,654
Highest	116,868	5,518	6,917	12,753	25,188	63,154	88,342
TOTAL Need	210,759	17,886	17,710	25,569	61,165	92,586	153,752
Unit Production in SF		3,641	2,494	1,524	7,659	21,810	29,469
Balance		(14,245)	(15,216)	(24,045)	(53,506)	(70,776)	(124,283)
<i>As Share of Need</i>		<i>-80%</i>	<i>-86%</i>	<i>-94%</i>	<i>-87%</i>	<i>-76%</i>	<i>-81%</i>

Source: San Francisco Planning Department.

If we review housing affordability groups for each wage quartile in Table 3, we see that the Ten-Year Retrospective (Historical) Assessment demonstrates that it is not individual income that affect housing affordability, but the combined household income of all workers in a household. Housing need also varies by family size. This is indicated in Table 3's data where some high quartile income individual earners can only afford housing in the lower AMI groups, likely because they are single worker households in large households; and where some Low Quartile income earners can afford housing in the moderate and above moderate AMI groups, likely because they are in multiple worker households and with smaller households. For instance:

- While 19 percent of workers were in the lowest wage quartile (40,000/211,000), only 11 percent of households formed by all workers were in the lowest AMI affordability category (18,000/154,000).
- Approximately 14 percent of the 88,500 households formed by SF Workers in the Highest Wage Quartile of individual income could afford housing only in the Lowest (<50% AMI) or Low (<80%AMI) AMI affordability groups, likely because they were one-income households with multiple dependents.
- At the other end of the wage spectrum, approximately 52 percent of the 26,500 households formed by SF Workers in the Lowest Wage Quartile based on individual income could afford housing in the Moderate (>80% AMI) and Above Moderate (>120% AMI) affordability categories, likely because they were two-or-more-income households, possibly with smaller household with few or no dependents.

Future Assessments

This section presents the jobs-housing fit assessments of the different views of future development required under Administrative Code Section 10E.41(b)(4), Annual Jobs-Housing Fit Report, plus an additional assessment added by the Planning Department, as follows:

1. Entitled Pipeline Projection – Projects expected to be completed between 2020-2030
2. Entitled Pipeline Projection – Projects expected to be completed after 2030
3. Major Projects with sites of two acres or more, proposed or approved in the past two years, and with a development agreement
4. Area plans with an area 2 acres or greater and proposed or approved in the past two years.
5. Long-range projections 2020-2040.

Entitled Pipeline Project Assessment – Completed Before 2030

As shown in Table 8, entitled pipeline project production expected to be completed by 2030 would add 13.3 million square feet (msf) of new building space, creating the capacity for about 49,500 net new jobs. The entitled projects' 49,500 net new San Francisco workers would form about 26,500 households, of which about 10,000 would need affordable housing. Entitled projects would produce about 13,500 more units (40,000) than needed (26,500) in total and would nearly meet affordable housing need (10,000) with the expected production of 9,900, leaving a deficit of about 100 affordable units (rounded, 253 units in the unrounded estimate).

Within the affordable AMI categories, expected production reveals that the Very Low and Low categories of affordable housing need would be met and exceeded, with net positive balances of 1,260 and 1,350, respectively. However the largest unmet need would be 2,900 units in the Moderate affordability AMI category ($\leq 120\%$ AMI), with production of 1,600 units compared to projected need of about 4,500 units. Note, this pipeline development data *underestimates* future affordable housing production that is likely to happen in this period. MOHCD will use inclusionary in lieu fees when the inclusionary requirement is not met on-site or off-site, as well as other funds (e.g., bonds, grants), to build affordable housing during this near-term period, and the pipeline data does not capture this production likely to happen.

The Above Moderate category production of 30,000 units in the 2020-2030 pipeline would exceed need (16,000) by 13,500 units providing a modest mitigation of the 53,500-total-unit deficit from the historical period.

TABLE 8: ENTITLED PIPELINE PROJECTS 2020-30

	Net New Square Feet						
	Office	Retail	Cultural	Visitor	Medical	PDR	TOTAL
Square feet by Sector ¹	9,250,740	1,591,208	1,137,998	1,742,745	9,576	(446,772)	13,285,495
	Employment						
Jobs by Sector ²	38,545	4,546	3,251	3,961	27	(784)	49,547
AMI Groups ³	Household Formation						
Very Low (<=50% AMI)	1,628	646	110	303	1	(76)	2,612
Low (<=80% AMI)	2,248	498	122	312	2	(79)	3,103
Moderate (<=120% AMI)	3,608	482	146	284	3	(83)	4,440
Above Moderate	14,875	861	277	373	9	(193)	16,202
TOTAL	22,359	2,487	655	1,272	15	(431)	26,357
	Housing Need						
	Affordable					Above	
	Very Low <50% AMI	Low <80% AMI	Moderate <120% AMI	Subtotal		Moderate	TOTAL
Housing Need ⁴	2,612	3,103	4,440	10,155		16,202	26,357
Housing Produced SF ⁵	3,874	4,448	1,579	9,902		29,950	39,852
Balance: Produced - Need	1,262	1,345	(2,861)	(253)		13,748	13,495

Notes:¹ Source Data: SF Planning Pipeline 4Q2019, Growth Capacity Assessment, MOHCD & OEWD, Bay Area Metro.² From SF Planning employment per square foot factors.³ From Keyser Marston, Jobs Housing Nexus, SF, May 2019, Table III-5, p 13. SF Household formation by Sector GSF & AMI.⁴ Household formation totals.⁵ Totals from data. Distribution to AMI Groups uses share from SF Affordable Housing Pipeline Table, June 2021.

Source: San Francisco Planning Department.

Entitled Pipeline Project Assessment – Completed After 2030

As shown in Table 8, entitled pipeline project production expected to be completed after 2030 would create the capacity to add about 15,000 San Francisco workers. Job change is greatest in the highest wage industrial sectors with second greatest change being in the low wage industrial sectors, similar to pattern of the Entitled Pipeline 2020-30 projects, as opposed to the lowest wage sectors like the 2009-19 historical period.

Those 15,000 new SF workers would form about 8,400 households, of which 3,500 would need affordable units. Those projects would produce about 9,900 more units than needed (18,300 vs 8,400). Notably, the total affordable housing need (3,500) would be slightly exceeded by production (4,800), with surplus production existing for the Very Low and Low categories and a 700-unit deficit for the Moderate category.

Production in the Above Moderate category (13,500) would exceed need (4,900) by 8,600 units, again providing additional modest mitigation of the 53,500-unit deficit from the historical period.

TABLE 9: ENTITLED PIPELINE PROJECTS 2030+

	Net New Square Feet						TOTAL
	Office	Retail	Cultural	Visitor	Medical	PDR	
Square feet by Sector ¹	2,607,024	1,085,392	102,980	252,100	0	145,164	4,192,660
Employment							
Jobs by Sector ²	10,863	3,101	294	573	0	255	15,086
Household Formation							
AMI Groups ³							
Very Low (<=50% AMI)	459	441	10	44	0	25	979
Low (<=80% AMI)	634	340	11	45	0	26	1,056
Moderate (<=120% AMI)	1,017	329	13	41	0	27	1,427
Above Moderate	4,192	587	25	54	0	63	4,921
TOTAL	6,302	1,697	59	184	0	141	8,383
Housing Need							
Affordable							
	Very Low <50% AMI	Low <80% AMI	Moderate <120% AMI	Subtotal	Above Moderate		TOTAL
Housing Need ⁴	979	1,056	1,427	3,462	4,921		8,383
Housing Produced SF ⁵		1,873	2,151	764	4,787	13,521	18,309
Balance: Produced - Need		894	1,095	(663)	1,325	8,600	9,926

Notes:

For Notes, see Table 8, Entitled Pipeline Projects, 2020-30.

Source : San Francisco Planning Department.

Major Projects Assessment

The next two sections cover the seven individual major project assessments that meet the Admin Code's minimum thresholds as well as two area plan assessments (Central SoMa & HUB).

1. 3333 California St.
2. Balboa Reservoir
3. Flower Mart (Site 1: 901 16th; Site 2: 610 Brannan St.)
4. India Basin
5. Mission Rock
6. Pier 70
7. Potrero Power Plant

The Administrative Code requires a jobs-housing fit assessment of each individual project that has a site of two acres or greater, was proposed or approved in the past two years, and a development agreement. The individual assessments follow below. Table 10, Major Projects Assessment, below, summarizes the totals across the seven individual projects.

The table shows that Major Projects would build out 7.3 msf of space, create the capacity for about 27,900 jobs, form about 15,800 households, produce approximately 9,300 units, and yield an overall deficit of 6,500 units. Each category of housing need would have a deficit, with about 3,000 affordable unit deficit and 3,500 Above Moderate category deficit.

TABLE 10: MAJOR PROJECTS ASSESSMENTS - TOTAL

	Net New Square Feet						TOTAL
	Office	Retail	Cultural	Visitor	Medical	PDR	
Square feet by Sector ¹	5,609,810	1,138,920	97,000	240,000	0	232,759	7,318,489
Employment							
Jobs by Sector ²	23,374	3,254	277	545	0	408	27,859
Household Formation							
AMI Groups ³							
Very Low (<=50% AMI)	987	462	9	42	0	39	1,539
Low (<=80% AMI)	1,363	356	10	43	0	41	1,813
Moderate (<=120% AMI)	2,188	345	12	39	0	43	2,627
Above Moderate	9,021	616	24	51	0	101	9,813
TOTAL	13,559	1,779	55	175	0	224	15,792
Housing Need							
Affordable							
	Very Low <50% AMI	Low <80% AMI	Moderate <120% AMI	Subtotal	Above Moderate		TOTAL
Housing Need ⁴	1,539	1,813	2,627	5,979	9,813		15,792
Housing Produced SF ⁵	1,183	1,358	482	3,023	6,273		9,296
Balance: Produced - Need	(356)	(455)	(2,145)	(2,956)	(3,540)		(6,496)

Notes:

For Notes, see Table 8, Entitled Pipeline Projects, 2020-30.

Source: San Francisco Planning Department.

The reader should keep in mind as the jobs-housing fit assessment of the individual projects and area plans is presented, that an imbalance in SF worker housing need and unit production would be expected in any given project or plan area. Project land uses are not formulated around the singular goal of meeting the housing need within a project site. They are developed around a range of goals, including land use suitability, location, real estate market, design, public exactions, and public contributions. Above all, no 2-acre site or even an individual neighborhood could be expected to be a self-contained and balanced economic and land use ecosystem, but of course functions as a component of the broader context of the overall city and region. Of more importance is whether the need can be met within the larger housing market for a job center without violating the planning goals of livable good places, sustainability, and inclusive prosperity. In addition, each of these projects is required to meet, and in some cases, exceeds the City's inclusionary housing requirement based on the negotiated package of public benefits for each project and plan. The following tables provide the individual jobs-housing fit assessment for the Major Projects. It should be noted that some of the plans and projects may include provisions for off-site housing investments or other financial contributions toward housing; these are not accounted for in these assessments. These assessments report on the internal land use and housing programs that will be constructed within the sites themselves. Also note that, while the Administrative Code only requires reporting on such projects approved within the prior two years, given that this is the first report and its publication was delayed by a number of factors, including the Covid pandemic, this report includes all of the major projects and area plans approved over the past 3+ years starting in late 2017.

TABLE 11: 3333 CALIFORNIA STREET

	Net New Square Feet						TOTAL
	Office	Retail	Cultural	Visitor	Medical	PDR	
Square feet by Sector ¹	0	0	0	0	0	0	0
Employment							
Jobs by Sector ²	0	0	0	0	0	0	0
Household Formation							
AMI Groups ³							
Very Low (<=50% AMI)	0	0	0	0	0	0	0
Low (<=80% AMI)	0	0	0	0	0	0	0
Moderate (<=120% AMI)	0	0	0	0	0	0	0
Above Moderate	0	0	0	0	0	0	0
TOTAL	0	0	0	0	0	0	0
Housing Need							
Affordable							
	Very Low <50% AMI	Low <80% AMI	Moderate <120% AMI	Subtotal	Above Moderate		TOTAL
Housing Need ⁴	0	0	0	0	0		0
Housing Produced SF ⁵		73	84	30	187	557	744
Balance: Produced - Need		73	84	30	187	557	744

Notes:

For Notes, see Table 8, Entitled Pipeline Projects, 2020-30.

Source : San Francisco Planning Department.

TABLE 12: BALBOA RESERVOIR

	Net New Square Feet						TOTAL
	Office	Retail	Cultural	Visitor	Medical	PDR	
Square feet by Sector ¹	0	7,500	10,000	0	0	0	17,500
Employment							
Jobs by Sector ²	0	21	29	0	0	0	50
Household Formation							
AMI Groups ³							
Very Low (<=50% AMI)	0	3	1	0	0	0	4
Low (<=80% AMI)	0	2	1	0	0	0	3
Moderate (<=120% AMI)	0	2	1	0	0	0	3
Above Moderate	0	4	2	0	0	0	6
TOTAL	0	11	5	0	0	0	16
Housing Need							
Affordable							
	Very Low <50% AMI	Low <80% AMI	Moderate <120% AMI	Subtotal	Above Moderate		TOTAL
Housing Need ⁴	4	3	3	10	6		16
Housing Produced SF ⁵		215	247	88	550	550	1,100
Balance: Produced - Need		211	244	85	540	544	1,084

Notes:

For Notes, see Table 8, Entitled Pipeline Projects, 2020-30.

Source : San Francisco Planning Department.

TABLE 13: FLOWER MART (SITES 1 & 2)

	Net New Square Feet						TOTAL
	Office	Retail	Cultural	Visitor	Medical	PDR	
Square feet by Sector ¹	2,014,960	104,420	0	0	0	(156,641)	1,962,739
Employment							
Jobs by Sector ²	8,396	298	0	0	0	(275)	8,419
Household Formation							
AMI Groups ³							
Very Low (<=50% AMI)	355	42	0	0	0	(26)	371
Low (<=80% AMI)	490	33	0	0	0	(28)	495
Moderate (<=120% AMI)	786	32	0	0	0	(29)	789
Above Moderate	3,240	56	0	0	0	(68)	3,228
TOTAL	4,871	163	0	0	0	(151)	4,883
Housing Need							
Affordable							
	Very Low <50% AMI	Low <80% AMI	Moderate <120% AMI	Subtotal	Above Moderate		TOTAL
Housing Need ⁴	371	495	789	1,655	3,228		4,883
Housing Produced SF ⁵	0	0	0	0	0		0
Balance: Produced - Need	(371)	(495)	(789)	(1,655)	(3,228)		(4,883)

Notes:

For Notes, see Table 8, Entitled Pipeline Projects, 2020-30.

Source : San Francisco Planning Department.

TABLE 14: INDIA BASIN

	Net New Square Feet						TOTAL
	Office	Retail	Cultural	Visitor	Medical	PDR	
Square feet by Sector ¹	0	209,000	0	0	0	0	209,000
Employment							
Jobs by Sector ²	0	597	0	0	0	0	597
Household Formation							
AMI Groups ³							
Very Low (<=50% AMI)	0	85	0	0	0	0	85
Low (<=80% AMI)	0	65	0	0	0	0	65
Moderate (<=120% AMI)	0	63	0	0	0	0	63
Above Moderate	0	113	0	0	0	0	113
TOTAL	0	326	0	0	0	0	326
Housing Need							
Affordable							
	Very Low <50% AMI	Low <80% AMI	Moderate <120% AMI	Subtotal	Above Moderate		TOTAL
Housing Need ⁴	85	65	63	213	113		326
Housing Produced SF ⁵	154	177	63	394	1,181		1,575
Balance: Produced - Need	69	112	0	181	1,068		1,249

Notes:

For Notes, see Table 8, Entitled Pipeline Projects, 2020-30.

Source : San Francisco Planning Department.

TABLE 15: MISSION ROCK

	Net New Square Feet						TOTAL
	Office	Retail	Cultural	Visitor	Medical	PDR	
Square feet by Sector ¹	1,700,000	250,000	0	0	0	0	1,950,000
Employment							
Jobs by Sector ²	7,083	714	0	0	0	0	7,798
Household Formation							
AMI Groups ³							
Very Low (<=50% AMI)	299	102	0	0	0	0	401
Low (<=80% AMI)	413	78	0	0	0	0	491
Moderate (<=120% AMI)	663	76	0	0	0	0	739
Above Moderate	2,734	135	0	0	0	0	2,869
TOTAL	4,109	391	0	0	0	0	4,500
Housing Need							
Affordable							
	Very Low <50% AMI	Low <80% AMI	Moderate <120% AMI	Subtotal	Above Moderate		TOTAL
Housing Need ⁴	401	491	739	1,631	2,869		4,500
Housing Produced SF ⁵	203	234	83	520	780		1,300
Balance: Produced - Need	(198)	(257)	(656)	(1,111)	(2,089)		(3,200)

Notes:

For Notes, see Table 8, Entitled Pipeline Projects, 2020-30.

Source : San Francisco Planning Department.

TABLE 16: PIER 70

	Net New Square Feet						TOTAL
	Office	Retail	Cultural	Visitor	Medical	PDR	
Square feet by Sector ¹	1,102,250	468,000	0	0	0	(295,600)	1,274,650
Employment							
Jobs by Sector ²	4,593	1,337	0	0	0	(519)	5,411
Household Formation							
AMI Groups ³							
Very Low (<=50% AMI)	194	190	0	0	0	(50)	334
Low (<=80% AMI)	268	146	0	0	0	(52)	362
Moderate (<=120% AMI)	430	142	0	0	0	(55)	517
Above Moderate	1,772	253	0	0	0	(128)	1,897
TOTAL	2,664	731	0	0	0	(285)	3,110
Housing Need							
Affordable							
	Very Low <50% AMI	Low <80% AMI	Moderate <120% AMI	Subtotal	Above Moderate		TOTAL
Housing Need ⁴	334	362	517	1,213	1,897		3,110
Housing Produced SF ⁵	246	283	100	630	1,470		2,100
Balance: Produced - Need	(88)	(79)	(417)	(583)	(427)		(1,010)

Notes:

For Notes, see Table 8, Entitled Pipeline Projects, 2020-30.

Source : San Francisco Planning Department.

TABLE 17: POTRERO POWER PLANT

	Net New Square Feet						
	Office	Retail	Cultural	Visitor	Medical	PDR	TOTAL
Square feet by Sector ¹	792,600	100,000	87,000	240,000	0	685,000	1,904,600
	Employment						
Jobs by Sector ²	3,303	286	249	545	0	1,202	5,584
AMI Groups ³	Houshold Formation						
Very Low (<=50% AMI)	139	41	8	42	0	116	346
Low (<=80% AMI)	193	31	9	43	0	121	397
Moderate (<=120% AMI)	309	30	11	39	0	127	516
Above Moderate	1,275	54	21	51	0	296	1,697
TOTAL	1,916	156	49	175	0	660	2,956
	Housing Need						
	Affordable						
	Very Low	Low	Moderate		Above		
	<50% AMI	<80% AMI	<120% AMI	Subtotal	Moderate		TOTAL
Housing Need ⁴	346	397	516	1,259	1,697		2,956
Housing Produced SF ⁵	291	334	119	743	1,734		2,477
Balance: Produced - Need	(55)	(63)	(397)	(516)	37		(479)

Notes:

For Notes, see Table 8, Entitled Pipeline Projects, 2020-30.

Source : San Francisco Planning Department.

1. A review of the individual Major Projects tables above reveals the expected variation in jobs-housing fit already described. The mixed-use projects, like Mission Rock and P70, have flexible land use programs that provide a potential range of development between residential and commercial so that the developer can be responsive to an evolving market. This analysis uses the City's best understanding of the most likely outcomes of residential and commercial development for project approval. The analysis does not use the maximum residential or maximum commercial scenario that is allowable under each project's approval. It should be noted that all of the above projects are also part of the Pipeline assessment accounting. Considering both future development capacities together would overestimate development potential by the double counting the pipeline project capacity. This double counting issue is adjusted for in the report's overall cumulative summary tables. 3333 California Street (approved November 2019) would not develop commercial space, and therefore have zero housing need, but would develop a total of 744 units, of which about 190 would be affordable.
2. Balboa Reservoir (approved August 2020) will create limited commercial development (17,500 sq. ft., and capacity for 50 jobs), but will develop 1,100 units of housing and create a housing surplus of 1,084 total units and 540 affordable units after meeting the housing need for 16 units (10 affordable) from the capacity for 50 jobs that it will create.
3. Flower Mart (Sites 1 & 2; January 2020) will construct about two (2) msf of development, yielding the capacity for approximately 8,500 jobs, which would create about 4,900 households needing that many units, of which 1,655-unit need would be affordable. Since the project would not produce housing, the

project itself would create a housing deficit equivalent to the need it creates: 4,900 units in total, 1,650 affordable.

4. India Basin (approved November 2018) will build about 210,000 sq. ft. of commercial and residential development, creating the capacity for 600 jobs forming 330 households. With production of 1,575 total units, the project would exceed need for total units (330) and for all affordable units (210 units), creating a housing surplus of 1,250 units in total and 181 affordable units.
5. Mission Rock (approved March 2018) will construct about two (2) msf of commercial and residential development, creating the capacity for 7,800 jobs forming 4,500 households. With production of 1,300 total units, the project would not meet need for total units (4,500) and for all affordable units (1,630 units), creating a housing deficit of 3,200 units in total and 11,100 affordable units.
6. Pier 70 (November 2017) will build about 1.3 msf of commercial and residential development, creating the capacity for 5,400 jobs forming 3,100 households. With production of 2,100 total units and 630 affordable units, the project would not meet need for total units (3,100) and for all affordable units (1,215 units), creating a housing deficit of 1,000 units in total and 580 affordable units.
7. Potrero Power Station (Approved April 2020) will build about 1.9 msf of commercial and residential development, creating the capacity for 5,600 jobs forming 3,000 households. With production of 2,500 total units and 750 affordable units, the project would not meet need for total units (3,000) and for all affordable units (1,300 units), creating a housing deficit of 480 units in total and 500 affordable units.

Area Plans Assessment

The area plan assessment reviews the development anticipated for a district of the city under the provisions of the plan, which typically involves some rezoning, but whose buildout is expected within roughly a 30-year time frame. Such development is not the same as that estimated from a pipeline project, with or without a development agreement. Pipeline project development is highly certain new development where the real estate investors have sought entitlement for specific development projects. In contrast, an area plan is the zoned development potential for future development projects and entitlement applications. Thus, some area plans development capacity may already be used in a pipeline development project. Considering both future development capacities together would overestimate development potential by the double counting the pipeline project capacity. For instance, the Central SoMa Area Plan includes capacity that is already being used in numerous pipeline project proposals as well as one "major" project included above. This double counting issue is adjusted for in the report's overall cumulative summary tables.

1. The Central SoMa Area Plan (approved December 2018) anticipates about 8 msf of commercial and residential development, creating the capacity for 33,500 jobs forming 19,500 households. With the capacity for 8,800 units (2,900 affordable), the area plan's anticipated development would not meet the need of its net new employees for 19,500 total units, of which 6,600 would be for affordable units, thereby producing a likely deficit of 10,500 units in total, of which 3,700 would be affordable.
2. The Market Octavia Plan Amendment (aka: the Hub; approved July 2020) anticipates about 250,000 sq. ft. of commercial and residential development, creating the capacity for 800 jobs forming 275 households. With the capacity for 1,650 units (340 affordable), the HUB Plan's anticipated development would exceed need of its net new employees for 275 total units, of which 340 would be for affordable units, thereby producing a surplus of 1,370 units in total, of which 190 would be affordable.

TABLE 18: AREA PLANS TOTAL

	Net New Square Feet						TOTAL
	Office	Retail	Cultural	Visitor	Medical	PDR	
Square feet by Sector ¹	7,840,228	225,241	119,240	423,712	0	(157,111)	8,451,311
Employment							
Jobs by Sector ²	32,668	644	341	963	0	(276)	34,339
Household Formation							
AMI Groups ³							
Very Low (<=50% AMI)	1,380	91	12	74	0	(27)	1,530
Low (<=80% AMI)	1,905	71	13	76	0	(28)	2,037
Moderate (<=120% AMI)	3,058	68	15	69	0	(29)	3,181
Above Moderate	12,607	122	29	91	0	(68)	12,781
TOTAL	18,950	352	69	310	0	(152)	19,529
Housing Need							
Affordable							
	Very Low <50% AMI	Low <80% AMI	Moderate <120% AMI	Subtotal	Above Moderate		TOTAL
Housing Need ⁴	1,530	2,037	3,181	6,748	12,781		19,529
Housing Produced SF ⁵	1,269	1,456	517	3,242	7,202		10,444
Balance: Produced - Need	(261)	(581)	(2,664)	(3,506)	(5,579)		(9,085)

Notes:

For Notes, see Table 8, Entitled Pipeline Projects, 2020-30.

Source : San Francisco Planning Department.

TABLE 19: CENTRAL SOMA AREA PLAN

	Net New Square Feet						TOTAL
	Office	Retail	Cultural	Visitor	Medical	PDR	
Square feet by Sector ¹	7,801,758	144,241	(58,160)	423,712	0	(108,912)	8,202,640
Employment							
Jobs by Sector ²	32,507	412	(166)	963	0	(191)	33,525
Household Formation							
AMI Groups ³							
Very Low (<=50% AMI)	1,373	59	(6)	74	0	(18)	1,482
Low (<=80% AMI)	1,896	45	(6)	76	0	(19)	1,992
Moderate (<=120% AMI)	3,043	44	(7)	69	0	(20)	3,129
Above Moderate	12,545	78	(14)	91	0	(47)	12,653
TOTAL	18,857	226	(33)	310	0	(104)	19,256
Housing Need							
Affordable							
	Very Low <50% AMI	Low <80% AMI	Moderate <120% AMI	Subtotal	Above Moderate		TOTAL
Housing Need ⁴	1,482	1,992	3,129	6,603	12,653		19,256
Housing Produced SF ⁵	1,136	1,305	463	2,904	5,896		8,800
Balance: Produced - Need	(346)	(687)	(2,666)	(3,699)	(6,757)		(10,456)

Notes:

For Notes, see Table 8, Entitled Pipeline Projects, 2020-30.

Source : San Francisco Planning Department.

TABLE 20: HUB AREA PLAN

	Net New Square Feet						TOTAL
	Office	Retail	Cultural	Visitor	Medical	PDR	
Square feet by Sector ¹	38,470	81,000	177,400	0	0	(48,199)	248,671
	Employment						
Jobs by Sector ²	160	231	507	0	0	(85)	814
AMI Groups ³	Household Formation						
Very Low (<=50% AMI)	7	33	17	0	0	(8)	49
Low (<=80% AMI)	9	25	19	0	0	(9)	44
Moderate (<=120% AMI)	15	25	23	0	0	(9)	54
Above Moderate	62	44	43	0	0	(21)	128
TOTAL	93	127	102	0	0	(47)	275
	Housing Need						
	Affordable				Above		TOTAL
	Very Low <50% AMI	Low <80% AMI	Moderate <120% AMI	Subtotal	Moderate		
Housing Need ⁴	49	44	54	147	128		275
Housing Produced SF ⁵	132	152	54	338	1,306		1,644
Balance: Produced - Need	83	108	0	191	1,178		1,369

Notes:

For Notes, see Table 8, Entitled Pipeline Projects, 2020-30.

Source: San Francisco Planning Department.

Long Range Growth Projections for San Francisco 2020-40

San Francisco uses long range growth projections, typically adopted by the regional planning agency Bay Area Metro or BAM, (which is a combination of the Metropolitan Transportation Commission, MTC, and the Association of Bay Area Governments, or ABAG) for a variety of reasons and purposes. These projections, updated every 4 years, generally represent the City's projected growth in households, housing units, and jobs (by sector) for a 20-25 year future period. The projections are used as the cumulative basis for essentially all CEQA analysis, is used by infrastructure and service delivery agencies (e.g. SFPUC, SFMTA, SFUSD) in planning for adequate infrastructure and services to meet the needs of projected growth, and to ensure consistency with regional projections as often required for certain state and federally-funded transportation activities. San Francisco also uses these projections to be a good regional planning partner by being consistent with the region's planning and so that the region's planning reciprocally reflect San Francisco's land use capacity and policies. These projections are inclusive of not just the *existing* pipeline of development projects and applications but of *all* housing and job growth expected over the period and for which the City should plan in order to meet regional planning objectives, particularly state mandated objectives for greenhouse gas reduction and sufficiently housing the projected household population growth.

SF Planning added an assessment of long-range projections to this report that the Administrative Code does not explicitly require. It did so to add the larger context of total growth anticipated for San Francisco for the 2020-2040 period to provide a better basis for understanding the overall jobs-housing fit to expect from both the currently proposed and as yet un-proposed projects. Using only the development entitlements currently in hand as representative of the "future" assessment for this Jobs-Housing Fit Assessment, as the Administrative Code sets as the minimum reporting requirement, would produce an incomplete picture of

what the future is projected to look like for both housing production and job growth over the times periods laid out for the Report’s assessment (2020-2030 and 2030+). Development entitlements in hand are not the totality of the development applications expected over these periods (even over the 2020-2030 near term), nor does new development represent the only source of job growth and change. For these reasons the Planning Department has used the most recently adopted full growth projections through 2040 to “complete” the picture and provide a more fully-informed Jobs-Housing Fit assessment.

The current projections of housing unit production and jobs used in the Table 21, below, came from Plan Bay Area 2040 adopted in July 2017 (PBA2017). BAM will adopt an updated Plan Bay Area 2050 in October 2021. The allocation to housing affordability categories came from this report’s jobs-housing fit methodology, as discussed previously in the Methods section.

The projected total unit production comes from the regional projections. However, the affordable unit production was constructed based on proportions reflected in San Francisco’s current pipeline data, resulting in an assumption of 33 percent affordable for the 13,300 units in the 2040 projections not accounted for in the pipeline, yielding 4,400 affordable units. The 33 percent is the share of affordable units in the Mayor Office of Housing and Community Development’s Affordable Housing Pipeline data.⁴ Although appearing high in comparison to the 26 percent share from the historical period, 2009-2020, this figure is likely a better estimator of the future period based on the expectation that affordable housing production will increase relative to past production and total housing production because of the policy attention it receives now and a higher average level of funding for affordable housing would continue at least at levels reflected in MOHCD’s existing pipeline data.

The second Table 22, “Share NOT Represented in Pipeline Projects” is the net growth in the 2040 projections in excess of that already considered in the other Jobs-Housing Fit assessments. This net growth includes expected buildout in the Central SoMa Plan area not already represented by specific pipeline development projects.

Thus, if we combine the pipeline projections with the regional projections above the Pipeline Project growth, we can “see” where and to what degree the 2040 projections are most likely to occur in San Francisco and to also see the net growth anticipated in the 2040 projections beyond the limited forecast of the pipeline. This net growth is shown in the second table.

4 See DataSF, <https://data.sfgov.org/Housing-and-Buildings/Affordable-Housing-Pipeline/aaxw-2cb8>. Data as of March 31, 2021.

TABLE 21: SAN FRANCISCO'S LONG RANGE GROWTH PROJECTIONS 2020-40

	Net New Square Feet						
	Office	Retail	Cultural	Visitor	Medical	PDR	TOTAL
Square feet by Sector ¹	14,319,212	3,500,000	1,750,000	2,200,000	2,295,331	6,851,970	30,916,513
	Employment						
Jobs by Sector ²	59,663	10,000	5,000	5,000	6,558	12,021	98,242
AMI Groups ³	Household Formation						
Very Low (<=50% AMI)	2,520	1,421	170	383	324	1,158	5,976
Low (<=80% AMI)	3,480	1,096	187	394	512	1,213	6,882
Moderate (<=120% AMI)	5,584	1,061	224	359	739	1,274	9,241
Above Moderate	23,025	1,894	425	471	2,197	2,960	30,972
TOTAL	34,609	5,472	1,006	1,607	3,772	6,605	53,071
	Housing Need						
	Affordable						
	Very Low	Low	Moderate		Above		
	<50% AMI	<80% AMI	<120% AMI	Subtotal	Moderate		TOTAL
Housing Need ⁴	5,976	6,882	9,241	22,099	30,972		53,071
Housing Produced SF ⁵	7,453	8,558	3,038	19,049	52,436		71,485
Balance: Produced - Need	1,477	1,676	(6,203)	(3,050)	21,464		18,414

Notes:

For Notes, see Table 8, Entitled Pipeline Projects, 2020-30.

Source : San Francisco Planning Department.

TABLE 22: SHARE OF LONG-RANGE PROJECTIONS NOT IN PIPELINE PROJECTS

	Net New Square Feet						
	Office	Retail	Cultural	Visitor	Medical	PDR	TOTAL
Square feet by Sector ¹	2,461,448	823,400	509,022	205,155	2,285,755	7,153,578	13,438,358
	Employment						
Jobs by Sector ²	10,256	2,353	1,454	466	6,531	12,550	33,610
AMI Groups ³	Household Formation						
Very Low (<=50% AMI)	433	334	49	36	322	1,209	2,383
Low (<=80% AMI)	598	258	54	37	510	1,266	2,723
Moderate (<=120% AMI)	960	249	65	33	736	1,331	3,374
Above Moderate	3,958	445	124	44	2,187	3,090	9,848
TOTAL	5,949	1,286	292	150	3,755	6,896	18,328
	Housing Need						
	Affordable						
	Very Low	Low	Moderate		Above		
	<50% AMI	<80% AMI	<120% AMI	Subtotal	Moderate		TOTAL
Housing Need ⁴	2,383	2,723	3,374	8,480	9,848		18,328
Housing Produced SF ⁵	1,706	1,958	695	4,359	8,965		13,324
Balance: Produced - Need	(677)	(765)	(2,679)	(4,121)	(883)		(5,004)

Notes:

For Notes, see Table 8, Entitled Pipeline Projects, 2020-30.

Source : San Francisco Planning Department.

Overall, the long-range growth forecast for San Francisco anticipates construction of about 31.1 msf of commercial and residential development, creating the capacity for 98,000 jobs with a need for 53,000 households. With the capacity for 71,500 units (19,000 affordable), the long-range projections' housing need for 53,000 units (22,000 affordable) would be met and exceeded by production overall (71,500) but not met with affordable production of 19,000 units, producing an overall surplus of 18,500 units and a modest affordable housing deficit of 3,000 units.

The portion of long-range projections in excess of the pipeline projects would involve the construction of about 13.5 msf of commercial and residential development, creating the capacity for 34,000 jobs and need for 18,500 housing units. With the capacity for 13,500 units (4,400 affordable), housing need for 18,500 units (8,500 affordable) would not be met with production of 13,500 units (4,400 affordable), producing a deficit of 5,000 units overall and 4,100 units affordable. It is this net housing need that is added to the pipeline assessments to create the cumulative Future assessment. Again, the assessments of the major projects and the area plans are *not* counted in the additive cumulative assessment because all of their housing units and jobs are already counted either in the pipeline or the 2040 projections.

APPENDIX A: AFFORDABLE HOUSING UNMET NEEDS FUNDING AND SITES ANALYSIS

Administrative Code Section 10E.4(c)(1)(C) requires the Planning Department, in consultation with the Mayor's Office of Housing and Community Development (MOHCD) conduct the following additional analysis on the affordable housing-related findings of main body of the Jobs-Housing Fit Report:

(C) Findings of the Annual Jobs-Housing Fit Report regarding how the housing needs associated with job growth compare to actual housing production by income levels. The Planning Department, in consultation with the Mayor's Office of Housing and Community Development, shall report in writing on the allocated funding, sites, and timing necessary to meet the affordable housing needs identified in the Report, and, insofar as the Report identifies unmet past and projected needs, the amount of additional funding, and sites for affordable housing, that would need to be allocated in order to meet the projected housing needs associated with job growth.

As indicated in the Executive Summary of the Report (and repeated below for convenience), there is a total cumulative unmet need of 56,554 affordable units, of which 53,506 units reflect the deficit from the preceding 10-year retrospective period of 2009-2019 and 3,048 units are the projected deficit for the future 20-year period of 2020-2040.

Assessments	Job Growth	Affordable Housing ¹					Above Moderate ² Housing				Total Housing			
		Need	Units	Unmet Need			Need	Units	Unmet Need		Need	Units	Unmet Need	
Historical Assessment (2009-19)	210,759	61,165	7,659	(53,506)	-87%		92,586	21,810	(70,776)	-76%	153,752	29,469	(124,283)	-81%
Future Development Assessment														
Entitled Pipeline Projects 2020-30	49,547	10,155	9,902	(253)	-2%		16,202	29,950	13,748	85%	26,357	39,852	13,495	51%
Entitled Pipeline Projects 2030+	15,086	3,462	4,787	1,325	38%		4,921	13,521	8,600	175%	8,383	18,309	9,926	118%
Long Range Projections (not in Pipeline)	33,610	8,480	4,359	(4,121)	-49%		9,848	8,965	(883)	-9%	18,328	13,324	(5,004)	-27%
Subtotal Future Development (2020+)	98,242	22,097	19,049	(3,048)	-14%		30,971	52,436	21,465	69%	53,068	71,485	18,417	35%
TOTAL 2009-2040	309,001	83,262	26,708	(56,554)	-68%		123,557	74,246	(49,312)	-40%	206,820	100,954	(105,866)	-51%

Notes:

AMI: Area Median Income.

¹ Very Low (<=50% AMI); Low (<=80% AMI); Moderate (<=120% AMI).

² Units affordable to households earning > 120% AMI.

Source: SF Planning Department.

For the future period, the Report identifies 14,689 affordable units currently in the “entitled” pipeline of projects. In addition to these units, the Report estimates an additional 4,359 affordable units not currently accounted for in the entitled project pipeline are projected to be built in San Francisco over the coming 20-year period. This projection uses the current near-term future pipeline of affordable units as a proxy for what could be reasonably expected to continue over the longer period. Of these 4,359 additional “projected” units, there are currently 2,697 new construction units, coming from 24 future projects, in the MOHCD pipeline, that are on sites under the control of MOHCD and that have local funding in place but as of yet are

not in the entitlement pipeline⁵. None of these units are included in other calculations in the Report, including those in the entitled pipeline or other represented as part of Large Projects (e.g. multi-phase Development Agreements) category. Adjusting the un-entitled “Long Range Projections (not in Pipeline)” production estimate downward from 4,359 units to 2,697 units to reflect only the units represented by affordable projects with sites secured by MOHCD, the Future period deficit would increase by 1,662 units from 3,048 units to 4,710 units and for the cumulative period to 58,216 units.

The City contribution required to build these 58,216 units are estimated at \$350K/unit, which assumes land acquisition cost of \$100K/unit for half of the units. Based on recent experience, it is estimated that half of the units will require acquisition support, and half will be provided through other no-cost land acquisition programs such as land dedication, Development Agreements, or the public lands program. The total MOHCD projected gap subsidy amount will total \$20,376,000,000. At an average project size of 75 units per project, this portfolio would require 776 additional sites.

It is worth noting that many of the affordable housing units counted in the entitled pipeline still require MOHCD funding (i.e. they are not all self-financed internally by the developments), such as the Balboa Reservoir site. The cost of additional needed MOHCD funding is not included in these cost estimates.

One way to meet part of the 58,216 needed affordable units is through inclusionary housing as part of market rate housing development, which would reduce the number of units that must be funded by MOHCD. Should the full projected cumulative deficit of 49,312 Above Moderate housing units be built, they would be accompanied by approximately 16,437 affordable inclusionary units based on an average applicable inclusionary rate of 25%. This would account for 28.3% of the cumulative affordable need, reducing the net deficit of affordable units from 58,216 to 41,779 units. This would also reduce the projected city gap subsidy requirement by \$5,753,000,000 to a total net funding need of \$14,623,000,000.

It is worth noting that were \$14.6B in City funding available to support the units as described, the City’s capacity to develop and fund new projects would continue be constrained by the availability of state funding. As of late 2020, the state tax exempt bond program, which works in concert with the federal 4% tax credit program, is oversubscribed by a factor of 3:1. The state’s new competitive scoring system favors low-cost projects in high-resource neighborhoods that effectively shuts out many San Francisco projects due to the relative high cost of development in this city and due to the City’s ongoing commitments to building affordable housing in low income communities. In 2021, of eight San Francisco projects that applied for state bond allocations, not a single one was funded.

The current unentitled MOHCD pipeline of 2,679 units in 24 projects has an average project size of 112 units. However, for the purposes of this analysis, it is assumed that site size will become more constrained in the future as available larger sites are developed and that average project size will be smaller than the current pipeline. Therefore, using a more conservative average project size of 75 units, the City will need to identify 776 sites. Assuming the inclusionary housing is built as described above, the number of sites needed would decline by 219 to a total of 557 sites.

⁵ Pending changes to federal tax credit regulations, which will be necessary to compete effectively for State funding resources, MOHCD projects that these 2,679 units will be delivered by 2030.

APPENDIX B: TECHNICAL NOTES AND ISSUES FOR CONSIDERATION

Producing this first Jobs Housing Fit report pursuant to the requirements established in the Administrative Code revealed a set of issues that a reader needs to understand in order to adequately interpret and understand the data, including the assumptions and limitations of this report, as well as issues needing consideration and resolution prior to preparing a second report. The issues range from technical (methodology, data, schedule) to policy (purpose, use, and value), and several issues relate to both in terms of being able to derive policy implications or potential actions from the findings of the report. These issues are summarized below. Prior to undertaking a subsequent report, these issues should be adequately considered, discussed and, ideally, resolved. Some of these issues may warrant modification to the requirements and expectations for the report laid out in the Administrative Code.

These issues either need to be understood for their implication in using the analytic results or they ought to be resolved so that the issue is not present in subsequent reports.

- 1. Mandated 10-year Framework for Historic Analysis – Economic Cycles and Adverse Events.** The Administrative Code requires that the report provide a 10-year retrospective accounting, regardless of how this particular period falls relative to actual economic cycles and changes in employment. Over time, a fixed rolling historical assessment such as this will arbitrarily bracket different patterns of employment peaks and valleys of change, providing exaggerated or even misleading overall pictures of both short- and long-term trends. Such changes would derive from the semi-regular economic cycles of boom and bust (eg Great Recession) and other unforeseen adverse events (eg pandemic, earthquakes, etc) which can lead to negative job growth, periods of significantly fluctuating or high unemployment, and conditions for re-growth into vacant space. This mandated 10-year bracketing will create exaggerated year-to-year appearances of housing need (or decline of need) in a report depending on the specific years that coincide with the beginning and end of the 10-year period; the results thus may not reflect actual conditions or cumulative conditions over an expanded period. For instance, the onset of the 10-year period of this first report happens to coincide with the nadir of the Great Recession in 2009 and its accompanying unusually high unemployment and high commercial real estate vacancy, and this same 10-year period lands on the back end in 2019 with the peak of the post-recession recovery and economic boom that featured record low unemployment and low vacancy. As such, the current report overstates the number of “net” jobs created during the period and thus overstates the “net” housing needs generated in the period relative to job growth over a longer period of time (eg relative to job levels in 2007, or even relative to job levels in 2000). On the other hand, periods that will end on years, such as 2020, that feature high unemployment related to adverse events or other economic declines, could misleadingly suggest declining demand for housing or otherwise *underrepresent* the long-term trends. At minimum, this dynamic requires an understanding by the reader of the socio-economic and historic context of the years in question in order to understand the limitations of the data presented for interpretative purposes. As such, this issue suggests a reconsideration of the legislated rolling 10-year period as a fixed mandate in order to create a report that maximizes its analytical utility. This dynamic also calls into question the overall marginal utility and necessity of producing the report *annually*,

especially given the substantial time and resources required for its production, since the value of such citywide information is the cumulative view of long-term trends, and the marginal annual changes will either not add substantially new information or might reflect the noise of exogenous and temporary deviations from long-term trends.

2. **Use of SF AMI Categories.** The report's estimate of housing need by AMI categories is made using only San Francisco AMI criteria instead of the AMI criteria for each county where existing San Francisco worker households reside or where future worker households may reside. This approach may somewhat over-estimate need for lower AMI affordability categories, as other counties' AMI levels differ from those of San Francisco, assuming many of these households in reality would continue to prefer to live outside of San Francisco (e.g. in a single family house, in a more suburban environment, in a location closer to a spouse's job) even given adequate affordable housing options in San Francisco, as is the case in an economically and physically connected region such as the Bay Area. For instance, the AMI (4-person household) in Solano County is \$95,000, whereas in San Francisco it is \$143,000. However, the distortion would be expected to be relatively minor, as it would likely affect only a few households at the boundaries between AMI categories. To the extent that the premise of this report is that the households of all San Francisco workers hypothetically ought to be accommodated with housing affordable at their household incomes within the confines of San Francisco's 47 square miles, this methodology would not over-estimate the needs. (For more discussion of this locational assumption, see point #9 below).
3. **Job Growth Unrelated to New Building Space.** The Administrative Code establishes that the report's analysis of future worker housing need be based not on projected total employment growth, as it is in the historical analysis, but on a proxy measure for expected employment growth -- that is employment growth capacity produced by net new commercial development. Not all job growth is connected to constructing new space. Job growth also occurs other ways, such as through densification of existing workspaces (i.e. increasing the numbers of workers per square foot), and through growth in workers who either primarily work from home or are employed in occupations that are primarily mobile (e.g. construction, transportation, home health care). Thus, the future-looking aspects mandated by the Administrative Code do not capture all the potential jobs necessary to conduct a full future-looking citywide jobs-housing analysis, unlike the historic assessment, which reports actual all-inclusive job data from preceding years inclusive of all San Francisco jobs regardless of whether they have a specific fixed location. (However, note that this data is limited to wage and salary workers, so it does not include some self-employed workers.)

The Planning Department's addition of the long-range projections to this report to supplement the Administrative Code's required pipeline and project data points overcomes this shortcoming by providing a comprehensive long-term projection of job growth inclusive of all sources and job types. Given the likely post-pandemic trends of increasing working from home and other remote work, it is possible that the relationship between built space and number of employed residents and worker households seeking housing in San Francisco shifts from pre-pandemic patterns. This trend will need to be monitored and may require an adjustment to the employment estimates as related to the gross square feet of future development, as well as potentially rendering inadequate the Administrative Code's sole focus on real estate development as the best proxy for future both job growth and worker households seeking housing in San Francisco.

4. **Overlapping Assessments.** Some of the future-looking assessments contain overlapping and duplicative sources of development capacity. This likely will create some confusion, especially as the totals of the sub-assessments required by the Admin Code cannot be simply summed to create an

aggregate total. Specifically, the mandated Area Plan and Development Agreement assessments contain substantial duplication and overlap with information in both each other's categories as well as with the Pipeline. This duplication requires substantially careful and complex accounting to ensure double (or triple!) counting does not occur in calculating the aggregate total. (See point #8 below for more discussion on conceptual issues with analyzing jobs-housing fit at a neighborhood or project-level.)

5. **Part-time jobs.** BLS employment data (as does all available job data) counts both part-time and full-time jobs as one job each, without distinguishing between them. Without understanding this and the need to create a methodology to overcome this, the housing need could be over-estimated as some people hold more than one job. In other words, the number of actual workers is less than the number of jobs represented in jobs data. However, the methodology created for this report for the historical analysis overcomes and neutralizes this issue by using real world Census data on households themselves, not by estimating household formation only based on the number of jobs represented in the BLS data. The jobs-to-household transformation using this method does not rely on a simple constant ratio of jobs to households in way that would thus treat part-time jobs as fulltime jobs. Instead, it uses data on real households with at least one member holding a job located in San Francisco. One advantage of this method is that the data also includes household income, which is the accurate value for associating a household with a housing affordability category (in contrast to an individual worker's wages or income). The household income is composed of total income from all working household members, whether full time or part time workers with one or multiple jobs.
6. **Publication Schedule vs Year of Jobs Data.** Jobs data with the necessary information to complete key mandated aspects of this report (e.g. sectors, wages) is not available from BLS for any calendar year until the following September (e.g. jobs data for calendar year 2019 was not available until September 2020). This is why the Planning Department has always published the annual Commerce & Industry Inventory, which is the Department's annual monitoring report on jobs, commercial development and overall economic activity in the city, toward the end of each calendar year, typically in December. (For instance, the Commerce & Industry Inventory for 2019 was published in December 2020.) Thus, the Administrative Code requirement to publish the Jobs Housing Fit report annually in April, coinciding with the publication of the annual Housing Inventory report logistically *conflicts* with the Code's requirement to conduct the analysis using the prior calendar year's jobs data. In contrast to the Housing Inventory Report which does *not* rely on external data, this report necessarily relies on federal sources that have a certain timeline for publication.

The unavoidable delay in producing this first report, for calendar year 2019, allowed use of both 2019 jobs data and 2019 housing data, because the analysis and publication did not occur until 2021. The earliest an annual report could be published that uses both jobs and housing data from the same calendar year is December of the following calendar year. (For instance, a report using jobs and housing data for 2021 cannot be published until the *end of 2022*.) Publishing an annual JHF Report in April as required by the Administrative Code would require either using data that is *2 years old* for both housing and jobs, or would require using data from different periods for housing and jobs (eg 2010-2020 for housing but 2009-2019 for jobs). This latter possibility would be more concerning, since as discussed above, even a 1-year shift in the retrospective 10-year period could result in the either the jobs or housing data coming from fundamentally different economic contexts. If the Department were to publish the next report in April 2022 as required by the Code, it would use jobs data from 2020, not 2021. Based on the substantial swings in employment levels related to the Covid pandemic in 2020 and lasting well into 2021, *the Planning Department does not recommend publishing another JHF report until data is*

available for calendar year 2021 or later, which mean would mean publishing a second report not earlier than December 2022.

7. **Assessments of Plans and Major Projects Does Not Consider Housing Fee Payments and Commitments to Off-Site Housing Production.** The assessment data for housing components of plans and projects only includes housing that is physically planned to be constructed in the subject plan area or on the project site, as included in the project's Project Description in the Planning Department's land use records. It does NOT account for *off-site* affordable housing that might be funded by contributions provided through impact fees (e.g. Jobs-Housing Linkage, Sec 415 inclusionary fees) or other commitments memorialized in a project's entitlements (e.g in a Development Agreement). In addition to introducing additional confusion as related to double-counting with other assessments (eg Pipeline), it is not within the scope of this report or within easily available existing data sets to report on detailed negotiated obligations or fee requirements that are not reflected in the land use program of the primary project. However, it is important to note, from a policy perspective, that some of these projects and plans deliver substantial affordable housing funding and benefits beyond that which is represented here. To the extent that any reader is seeking to draw conclusions about the jobs-housing "fit" of a particular plan or project, inclusive of all housing funds and commitments provided by the project, separate research would be needed on that individual plan or project.
8. **Scale of the Jobs-Housing Ecosystem: Area Plans and Major Projects.** The Administrative Code requires the JHF Report to include discrete assessments on individual area plans and certain major projects. This requirement and the information it produces presents an unclear set of implications to the casual reader. In addition to potentially lacking the full picture of a project's housing contributions (as noted in the prior point), a more fundamental consideration is that at smaller scales of geography and development, a 1:1 jobs-housing fit (and jobs-housing balance more generally) is not a practical objective, since individual city blocks or even larger neighborhoods are not self-contained physical and economic ecosystems. Almost all projects or area plans lean more heavily toward residential or non-residential uses, depending on the location, especially transit and other infrastructure, site constraints, as well as historic context of the area's development, among other factors. It is to be reasonably expected that almost every plan or project would show either an apparent surplus or deficit of housing production within its own confines, and it would typically be mere happenstance of the boundaries drawn that a "fit" or "balance" would be achieved at any of these scales. Just as it would be inconceivable and physically impossible to house every one of the hundreds of thousands of downtown workers within the confines of downtown, it would be similarly impractical to introduce sufficient jobs to primarily residential neighborhoods, for instance the Sunset or Excelsior neighborhoods, to create a balance of housing and jobs in those sub-areas of the city. Jobs are typically distributed and concentrated in certain locations for practical reasons related to accessibility, both locally and regionally, the types of services and activities they provide, and other factors. The smaller the geographic frame of reference for consideration, the more there will likely be a lack of "fit". Other than for potential use as a point of reference to inform future negotiations or deliberations on specific large-scale plans or projects, it is not clear that jobs-housing fit or jobs-housing balance is a useful lens at these small geographies. At the very least, when considering how and whether to apply such an analytical framework in these circumstances, one must consider the particular location and role in the overall city and region, and consider them in light of how they affect the overall cumulative city and regional jobs-housing fit and jobs-housing balance rather than in isolation.
9. **Scale of the Jobs-Housing Ecosystem: City and Regional Context.** The premise of this Report is that the housing needs of 100% of San Francisco workers ought to be accommodated within the boundaries

of the city of San Francisco. This policy assumption is consistent with the methodology of the Jobs-Housing Linkage Nexus Study, that is the basis for the Jobs-Housing Linkage impact fee on commercial development. The same consideration discussed in the prior point is worth consideration at the larger scale of the entire city as well. San Francisco is one of approximately 120 cities in the Bay Area, which is one tightly integrated physical and economic region. Some cities in the region have higher concentrations of jobs and some are very heavily residential with few major job centers. At present, about 45% of the workers in San Francisco reside outside of the boundaries of the city of San Francisco, a ratio which has changed little for several decades. The underlying policy interest in conducting jobs-housing fit analyses is a sound one, which is to ensure that the growing workforce is matched with a growing housing stock affordable to their households. This report confirms what is widely known – that robust job growth in San Francisco has outpaced housing production across all affordability levels, including at the Above Moderate income level. It also reaffirms the need to strenuously seek all avenues to increase production of and funding for affordable housing and financial support for low income households, in addition to facilitating an increase in the overall amount and pace of housing construction. The recently released state-mandated RHNA allocation for San Francisco for the upcoming period of 2023-2031 affirms the same story, with San Francisco's RHNA requirement almost quadrupling overall (and similarly across all income levels) from the past 8-years period. While it only covers an 8-year period, the current RHNA methodology employed by the state and the region intends to account for all sources of housing need, not just job growth associated with new development, including overall population growth, demographic changes, requirements to Affirmatively Further Fair Housing, the overall housing market conditions in the region, and housing production deficits at all income levels from past economic cycles such as noted in this report.

10. **Limitations of the Jobs-Housing Fit Analysis Related to Measuring Overall Affordability and Appropriate Policy Responses.** It is important to note that the purpose of the report as laid out in the Administrative Code is not to measure the overall affordability of the actual housing market for workers or for households of various incomes. This report does not attempt to measure or project how the housing market has or will evolve relative to affordability or availability of housing; this type of analysis simply measures and projects the absolute net incremental quantities of worker household and housing unit growth over the subject periods. While arguably the single largest factor in driving housing demand, growth in worker households is not the only source of growing housing demand. As noted above, in a well-connected region like the Bay Area, some workers in other cities also regularly seek to live in San Francisco, just as workers in San Francisco seek to live in other cities. Understanding these inflows and outflows is important to understanding the dynamics of overall regional housing markets. Other significant sources of demand unrelated to workers include students, retirees, the unemployed, second homeowners, and other populations. In fact, households at lowest end of the income spectrum (<30% AMI) are heavily represented in these categories not captured by this kind of jobs-fit analysis, as about 60% of Extremely Low Income households have no worker. It is important to note that meeting housing needs is not only about housing production of new units, as measured by this report, but also includes programs like rental assistance, income support, acquisition of existing units, which can be practical ways of meeting the needs lower income households, in addition to producing new deed-restricted affordable units.

Planning Department Recommendations for Consideration Prior to Future Reports:

1. **Publish the Jobs-Housing Fit report no more frequently than every 4 years.** The value of the comprehensive analysis in this report is the broad overview it provides of long-range trends and cumulative conditions. The minor incremental differences between reports produced on an annual basis – from both the historical and futures analyses -- would be unlikely to reveal any new or surprising unforeseen conditions from the previous year that would suggest a new policy response. The marginal annual changes are also more prone to simply highlighting the noise of exogenous and temporary deviations from long-term trends. The Department already publishes annual reports on both housing production (e.g. Housing Inventory, among others) and job trends (Commerce & Industry Inventory) that provide ongoing granular monitoring. Given that the regional planning agencies MTC/ABAG update the regional plan long-range growth projections every 4 years, it makes sense to align the frequency of this report's analysis with those updates so that the future projections can be updated. This frequency will be sufficient to gauge any changing conditions in the extended trends. Weighing these dynamics against the substantial time and resources required for the production of this analysis, it might be a better use of resources to focus on quadrennial publication coinciding with the year following the update to the regional plan.
2. **Include the City's 20-year comprehensive job and housing growth projections (consistent with the Housing Element and/or operational long-term projections) in every report's futures analysis to supplement pipeline data, and consider eliminating the assessment of individual area plans and major projects.** It is important to include a comprehensive approach to analyzing future projections so that the analysis is inclusive of all projected jobs (not just those related to new development), does not produce only a fractional picture of the future based only on only entitlements in hand, and that reinforces the essential broad scale utility of this analysis, rather than focusing on small geographic reference points where one would not expect a jobs-housing "fit" to be achievable or in many cases desirable.
3. **Consider using a fixed base year for subsequent historic analyses.** Ideally the base year would be either a peak of past employment levels or a mid-cycle condition with a "normal" (eg 5%) historic average unemployment rate, such as 2005 or 2014. A fixed base year would result in an ever-lengthening historic period, but one that would provide a truer accounting of the actual trends and accumulated deficit/surplus, rather than only a snapshot of the most immediate past economic cycle or a distorted view of trends where on one or both endpoints fall on extreme peaks or valleys of the economy or other unusual circumstances. In order to produce the most useful reports for the public and decision makers in order to inform policy discussion, it also would generally be preferable for the Administrative Code to provide flexibility on methodology and to describe the intent of the report, but not to set specific parameters, ways data needs to be presented or tabulated, specific years of reference, or other particulars that can distract from efforts to construct the most useful analysis as evolving conditions warrant.

APPENDIX C: ADMINISTRATIVE CODE

The following excerpts of the Administrative Code include Sections 10E.41(b)(4) *and* (c)(1)(C) amended by Ordinance No. 297-19 and passed in December 2019 (effective January 2020) to require a new Jobs-Housing Fit Report be added to the annual Planning Commission Housing Hearing and to the Report to the Board of Supervisors.⁶

SEC. 10E.4. HOUSING ELEMENT PRODUCTION REPORTS AND HEARINGS.

(b) Planning Department Reports.

(4) **Annual Jobs-Housing Fit Report.** The Planning Department shall publish a Jobs-Housing Fit Report (“Report”) on April 1 of each year, as a companion report to the annual Housing Inventory. The Report shall analyze the number, types, and wage distribution by quartile of jobs created or lost in the City, and provide an estimate of the housing needs associated with those jobs. The Report shall compare those housing needs by wages to actual housing production in San Francisco by affordability levels (“Jobs-Housing Fit”). The Report shall use available and relevant data from regularly published sources on jobs, wages, commercial and housing production, project approvals, standard assumptions for jobs per square foot by industry type, occupations and wage distribution by quartile associated with those industry types, workers per household and household size, and shall use the household income classifications expressed in the Housing Element of the General Plan. The Report shall include the following components:

(A) **Ten-year Retrospective Assessment.** The Report shall provide an assessment of the Jobs-Housing Fit in the City for the preceding ten years through the end of the preceding calendar year.

(B) **Pipeline Projection.** The Report shall project the expected Jobs-Housing Fit for the current pipeline of entitled projects. The projection shall include: commercial and housing development projects that have received their first building or site permit; entitled commercial and housing developments that have been approved but have not yet received their first building or site permit; and projects subject to development agreements, but shall not include the portions of multi-phase projects with phases expected to continue beyond ten years. The projection shall use the affordability levels associated with entitled housing developments including on-site inclusionary units. The Report shall compare projected housing needs by wages directly associated, and indirectly associated, to the extent feasible, with the entitled commercial pipeline to the affordability levels of the entitled housing pipeline. The Report shall separately evaluate the Jobs-Housing Fit for the extended development pipeline including those portions of multi-phase projects extending beyond ten years.

(C) **Area Plan and Major Projects.** For each draft Area Plan and major commercial or mixed-use development project larger than two acres subject to a development agreement under consideration or approved in the previous two years, the Report shall identify the Jobs-Housing Fit for each such project. To the extent Planning Department staff reports already have evaluated the Jobs-Housing Fit for these projects, the Report may reference those staff reports.

⁶ Ordinance No. 297-19 amended the Code in December 2019 (effective January 2020).
https://codelibrary.amlegal.com/codes/san_francisco/latest/sf_admin/0-0-0-6033#JD_10E.4.

(c) Annual Planning Commission Housing Hearing; Report to the Board of Supervisors.

(1) Commission Hearing. The Planning Commission shall hold an annual public hearing subsequent to publishing the Housing Inventory. This hearing shall provide, at a minimum, information on:

(A) Findings of the annual Housing Inventory regarding how housing production trends match with San Francisco's quantified regional housing needs allocation for different income levels as determined in the General Plan's Housing Element, and including data on households earning approximately 120% to 150% of area median income based on sponsors' disclosure of unit pricing for market rate housing proposals and other available data; senior housing units; and the number of efficiency, studio, one bedroom, two bedroom and three bedroom and above units (when the ability to collect this data exists); and

(B) Findings of the state mandated annual Housing Element Progress Report regarding how housing production trends advance the Housing Element's policies and goals.

(C) Findings of the Annual Jobs-Housing Fit Report regarding how the housing needs associated with job growth compare to actual housing production by income levels. The Planning Department, in consultation with the Mayor's Office of Housing and Community Development, shall report in writing on the allocated funding, sites, and timing necessary to meet the affordable housing needs identified in the Report, and, insofar as the Report identifies unmet past and projected needs, the amount of additional funding, and sites for affordable housing, that would need to be allocated in order to meet the projected housing needs associated with job growth.

(2) Annual Report to the Board. The Planning Department shall provide an annual report to the Board of Supervisors concerning the results of the Commission's hearing and any recommendations for legislation.

ACKNOWLEDGEMENTS

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