



SAN FRANCISCO PLANNING DEPARTMENT

MEMO

RESIDENTIAL PIPELINE ENTITLED HOUSING UNITS 2017 Q4

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This report is submitted in compliance with Administrative Code 10E.4 (b)(1) and provides a summary of data on the total number of units at various stages of the housing production process and how completed and pipeline projects compare with San Francisco’s Regional Housing Need Assessment (RHNA) production goals. The State Department of Housing and Community Development (HCD) determines these RHNA goals that San Francisco’s Housing Element must address. The RHNA total is the minimum number of housing units that a region or jurisdiction must plan for in each RHNA reporting period.

The table below shows actual production – i.e. built units – through the fourth quarter of 2017. San Francisco reports actual production in its progress towards meeting RHNA goals; these figures are submitted annually to the State Department of Housing and Community Development in April. The most current submittal was sent April 2017 and covered actual production in 2015 and 2016.

Progress Towards Meeting 2022 RHNA Production Goals, as of 2017 Q4

	Total RHNA Housing Goals, 2015 - 2022	Pro-Rated RHNA Housing Goals, 2015 - 2017	Actual Production, 2015 - 2017	Actual Production, 2015 - 2017 as % of Total RHNA Housing Goals	Actual Production as % of 2015 - 2017 Pro-Rated RHNA Housing Goals
TOTAL	28,869	10,826	14,467	50.1%	133.6%
Very Low Income	6,234	2,338	2,759	44.3%	118.0%
Low Income	4,639	1,740	1,070	23.1%	61.5%
Moderate Income	5,460	2,048	612	11.2%	29.9%
Above Moderate	12,536	4,701	10,026	80.0%	213.3%

The residential pipeline for the purposes of this report only includes entitled projects. The total number of entitled units is tracked by the San Francisco Planning Department and is updated quarterly in coordination with the *Quarterly Pipeline Report*. Subsidized housing units – including moderate and low income units – as well as inclusionary units are tracked by the Mayor’s Office of Housing; these are also updated quarterly.

The following table shows entitled units at various stages of development but are not yet built. Units under construction and projects with active building permits are likely to be completed within the

RHNA reporting period. Typical duration from filing of building permit to building completion ranges from two to four years, depending on the size and complexity of the project.

Entitled Units, 2017 Q4

	Entitled by Planning, No Permits Filed*	Entitled, Building Permit Filed	Building Permit Approved or Issued	Under Construction	Total Entitled by Planning*
TOTAL	3,185	5,315	6,915	6,270	21,685
Very Low Income	-	-	170	489	659
Low Income	249	121	660	470	1,500
Moderate Income	268	166	147	289	870
TBD				401	401
Above Moderate	2,668	5,028	5,938	4,621	18,255

* This column does not include seven entitled multi-phased master plan development projects that are not expected to be fully completed within this current RHNA reporting period. These projects have a total of 27,720 net new units, including about 6,380 net affordable units (23% affordable). However, phases of these projects will be included when applications for building permits are filed and proceed along the development pipeline.

The table below presents a summary of completed units and development projects in the current residential pipeline to the fourth quarter of 2017 (Q4).

Summary of Completed and Entitled Units Compared to RHNA Production Goals, 2017 Q4

	RHNA Housing Goals, 2015 - 2022	Actual Production, 2015 - 2017	Total Entitled by Planning, 2017 Q4*	Actual Production and Entitled, 2017 Q4*	Actual Production and Entitled, as % of Total RHNA Housing Goals
TOTAL	28,869	14,467	21,685	36,152	125.2%
Very Low Income	6,234	2,759	659	3,418	54.8%
Low Income	4,639	1,070	1,500	2,570	55.4%
Moderate Income	5,460	612	870	1,482	27.1%
TBD Affordable			401	401	
Above Moderate	12,536	10,026	18,255	28,281	225.6%

* This column does not include seven entitled major development projects that are not expected to be fully completed within this current RHNA reporting period. These projects have a total of 25,790 net new units, including about 5,490 net affordable units (23% affordable). However, phases of these projects will be included when applications for building permits are filed and proceed along the development pipeline.