



Land Use Planning and Growth

Overview

San Francisco
Planning

SFMTA Board Informational | July 19, 2016

Why Are We Here Today at MTAB?

To provide an overview of recent and ongoing land use planning in SF to prepare for the launch of Connect SF and upcoming joint Planning Commission-MTAB session on July 21.

A. Overview of Land Use Planning 1970s – present

- Notable Plans
- Influential Policies and Transportation Milestones
- Highlights of Current Work Program
- Trends and Challenges

B. The Numbers: Performance, Pipeline and Projections

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Theme 1: Reinforce the Downtown/Protect the Neighborhoods

Urban Design Element	(1972)
Downtown Plan	(1985)
Chinatown Plan	(1987)
Neigh. Commercial	(1987)
SoMa Plan	(1990)
NE Waterfront Plan	(1970/1997)



Influential Events and Policies:

BART/Muni Metro (1973)
Transit First Policy (1973)

Prop K – Park Shadows (1985)
Prop M – Annual Office Limit (1986)
Prop H – Waterfront Planning (1990)

Theme 2: Housing-Oriented Area Plans: TOD and “Better Neighborhoods”

Van Ness	(1988)
Rincon Hill	(1985/2005)
Transbay Redev.	(2005)
Market-Octavia	(2008)
Eastern Neigh.*	(2008)
Balboa Park	(2009)
Schlage Lock	(2009/2014)
Candlestick & Hunter’s Point*	(2010)
Parkmerced	(2011)
Treasure Island	(2011)
Glen Park	(2012)
Western SoMa*	(2013)
HOPE SF	(2016)
India Basin	(2017)
The Hub	(2018)



Influential Events and Policies:

Freeway Removals	(1991, 2003)
Transportation Element	(1995)
Muni Rail Expansions (F, MMX, T)	(1995, 1997, 2007)
TEA-21	(1998)

Dot-Com/Live-Work Boom	(1990s-2000)
Modernized zoning, Community Plan Exemptions, Implementation Plans	
HOPE VI/HOPE SF	(1993 – present)
Base Realignment	(1990)

8 Element of a Great Neighborhood (Better Neighborhoods Program)

WALK TO SHOPS



WALK TO SHOPS

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SAFE STREETS



SAFE STREETS

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SAFE STREETS

GET AROUND EASILY



GET AROUND EASILY

GET AROUND EASILY

GET AROUND EASILY

HOUSING CHOICES



HOUSING CHOICES

HOUSING CHOICES

HOUSING CHOICES

GATHERING PLACES



GATHERING PLACES

GATHERING PLACES

GATHERING PLACES

CITY SERVICES



CITY SERVICES

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CITY SERVICES

SPECIAL CHARACTER



SPECIAL CHARACTER

SPECIAL CHARACTER

SPECIAL CHARACTER

PART OF THE WHOLE

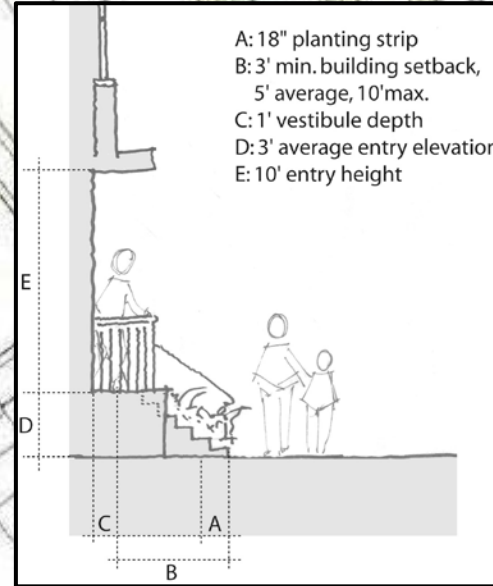


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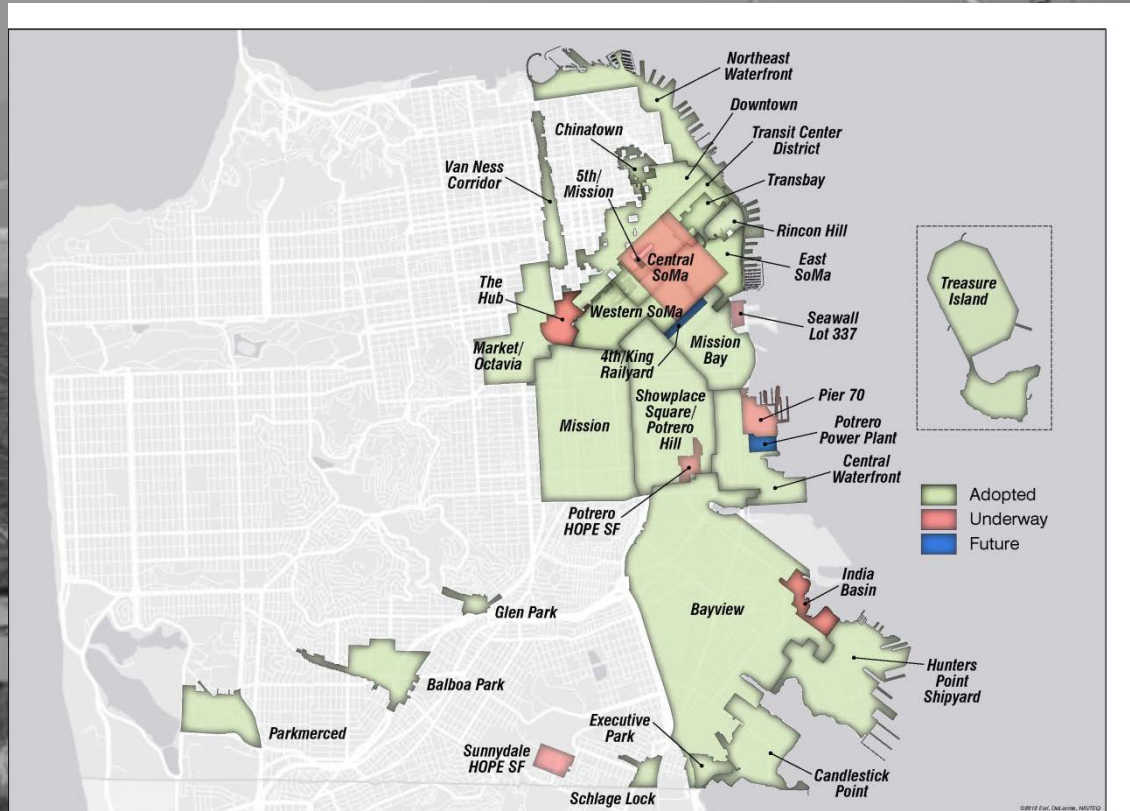
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Neighborhood Quality: Design, Amenities, Implementation



Theme 3: Expanding the Core and the Mixed Use City

Mission Bay	(1998)
Transit Center District	(2012)
5 th /Mission	(2015)
Central SoMa	(2017)
Eastern Waterfront:	
Seawall Lot 337	(2017)
Pier 70	(2017)
Potrero Power Plant	TBD
Railyards	TBD



Influential Events and Policies:		
Transbay/DTX/Electrification Planning	(2000s)	SB 375 (2008)
Central Subway construction	(2010s)	Housing Element (2009)
		Plan Bay Area (2013)
		Value Capture

Growth and diversification of job base outside downtown

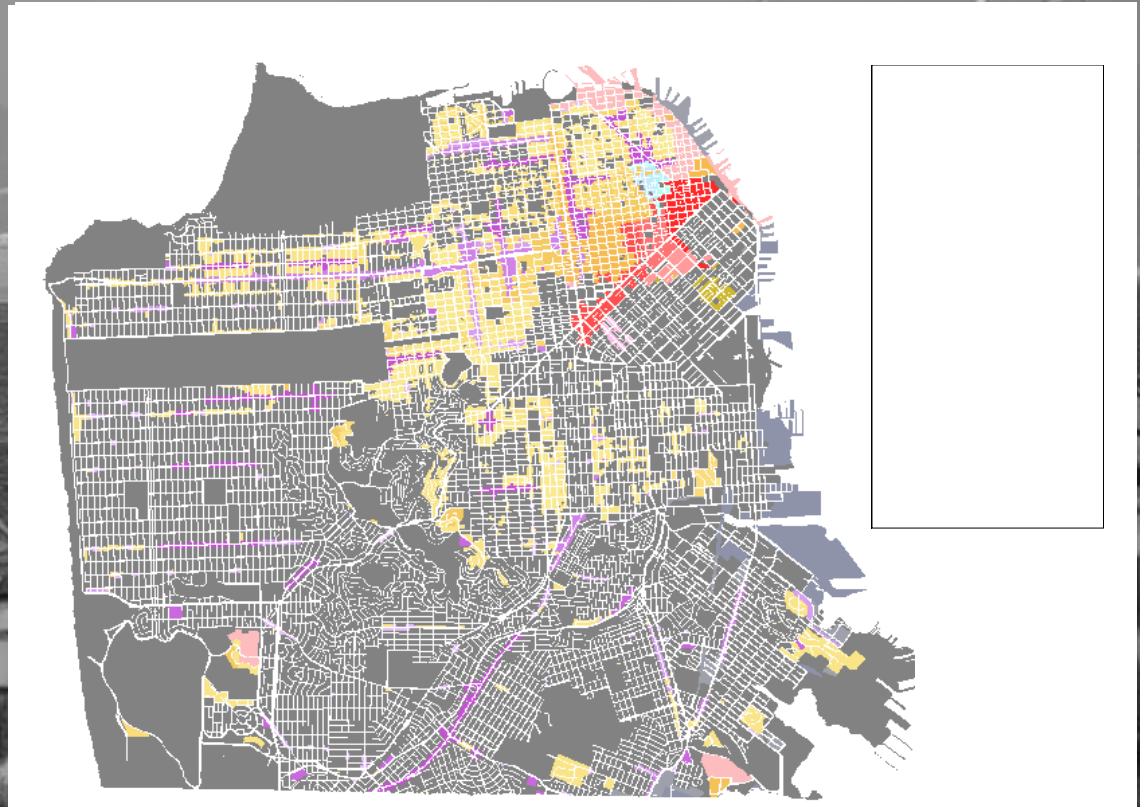


Theme 4: Regional Housing Crisis: Citywide Housing Supply

Legalization of Existing In-Law Units (2014)

New Accessory Dwelling Units
 Seismic upgrades (2015)
 D3, D8 (2015)
Citywide (2016?)

Local Affordable Bonus Law (2016?)



Influential Events and Policies:

Housing Element	(2009)	Props K + C – Housing Production Goals and Affordability Requirements	(2015/1016)
Court ruling on State Density Bonus	(2013)	CA Housing Streamlining	(2016?)

Broader Trends Requiring Planning Action

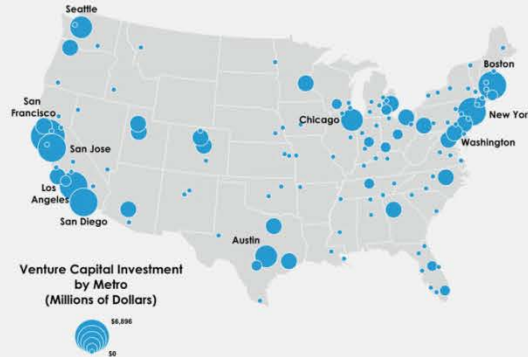
Urbanization

The world's population is urbanizing and San Francisco's growth is accelerating.



Clustering

Talent and capital are clustering in key cities like San Francisco, fueling rapid growth and change.



Climate Change

Long term climate change is already occurring and will accelerate, requiring us to respond effectively to sea level rise, more frequent storms and to do our part in reducing green house gases.



Millennials and Baby Boomers

The preferences of the groups now between the ages of 20-35 and between 50-70 will shape how our city looks, feels and functions in profound ways, redefining urban living. Equity and access for all will be necessary to share the benefits of this new way of living.



No city is an island.

Increasingly, regional (metropolitan scale) cooperation is needed to stay competitive and address a range of social and environmental issues.



Health

The kind of neighborhood we live in greatly influences our health. Chronic diseases like obesity and diabetes can be reduced by walkable environments, provision of play space, and healthy food choices nearby. Many neighborhoods don't function like this now.



Population and Household Growth Rates

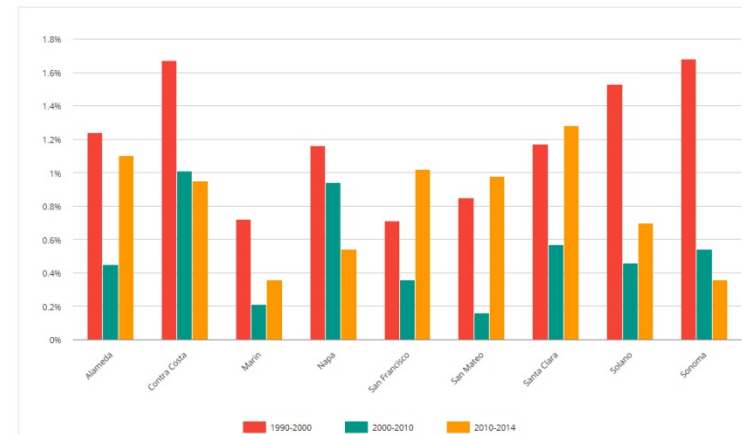
SF population has grown steadily since a low point in 1980 by 25K-50K/decade

2010-2014 growth rate outpaced historic trends, leading to jump in household size and workers per household

SF growth rate has surpassed much of region and accelerated more than others

	1980	1990	2000	2010	2014
Total Population	678,974	723,959	776,733	805,235	852,469
Population Change		44,985	52,774	28,502	47,234
% Population Change		6.6%	7.3%	3.7%	5.9%
Household Population	654,511	699,330	756,976	780,971	831,894
% HH Population Change		6.8%	8.2%	3.2%	6.5%
Households	298,956	305,584	329,700	345,811	353,406
Households Change		6,628	24,116	16,111	7,595
% Households Change		2.2%	7.9%	4.9%	2.2%
Household Size	2.19	2.29	2.30	2.26	2.35
Employed Residents per Household	1.15	1.26	1.3	1.29	1.34

Average Annual Population Growth Rate by County



SOURCES: U.S. Census Bureau; § ACS 2014 One Year Estimates

Housing Growth Rates

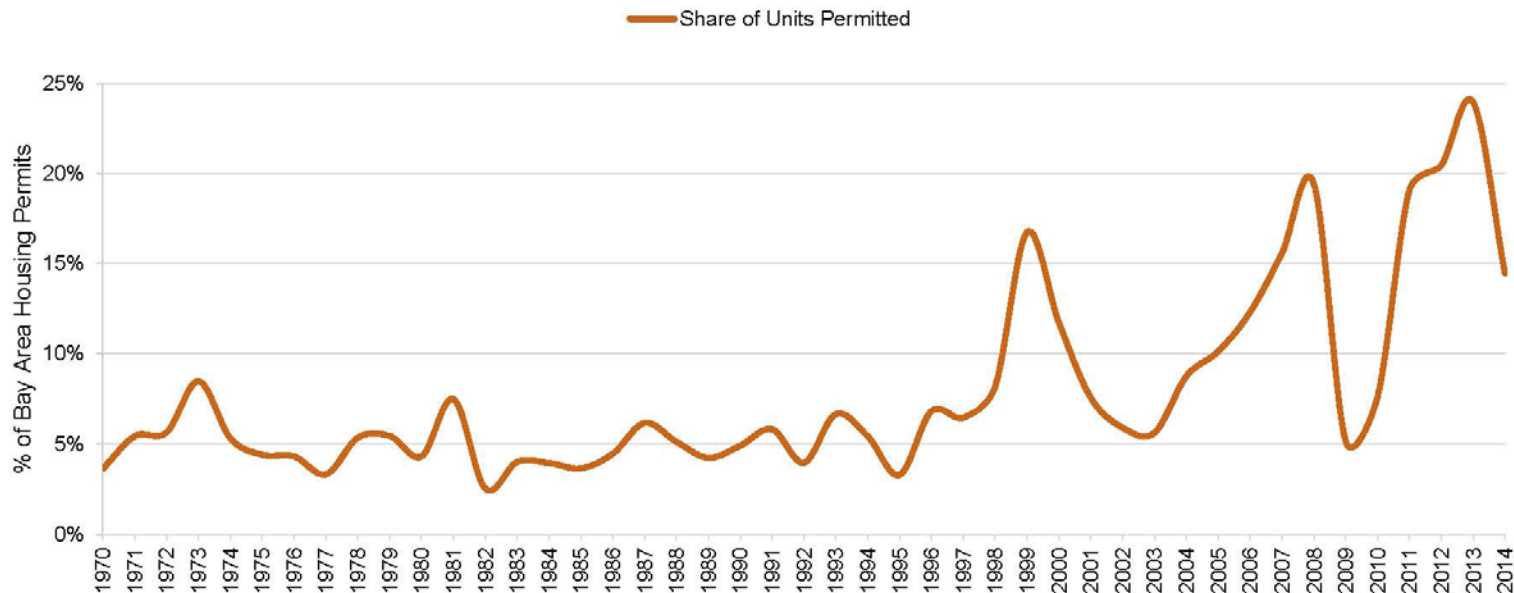
1970-1990: + 1,105 units/year (5.5% of region)

1990-2010: + 2,302 units/year (9.9% of region)

2010-2015: + 1,874 units/year (15% of region)

2013-2015: + 2,809 units/year (> 15% of region)

Figure 45. San Francisco Share of Bay Area Housing Permits, 1970-2014



Sources: CIRB, 1970-2015; Strategic Economics, 2016.

Plan Bay Area Projection (2010-2040): Household Growth

- Adopted 2013 PBA

Region: 759K households

SF: 100K households

(13% of region)

- Actual Growth: 2010-2014

Region: 156K pp, 66K households

SF: 47K pp, 7.6K households

(30%, of region by pp, 12% of region by hh)

- Draft 2017 PBA

Region: 783K households

SF: 111-140K households

(14-18% of region)



Housing Pipeline (Q2 2016)



	<u>Units</u>
Under Construction	8,816
Entitled	31,546
Under Review	<u>21,734</u>
	62,096

Large Master Plans: 50% of Pipeline!



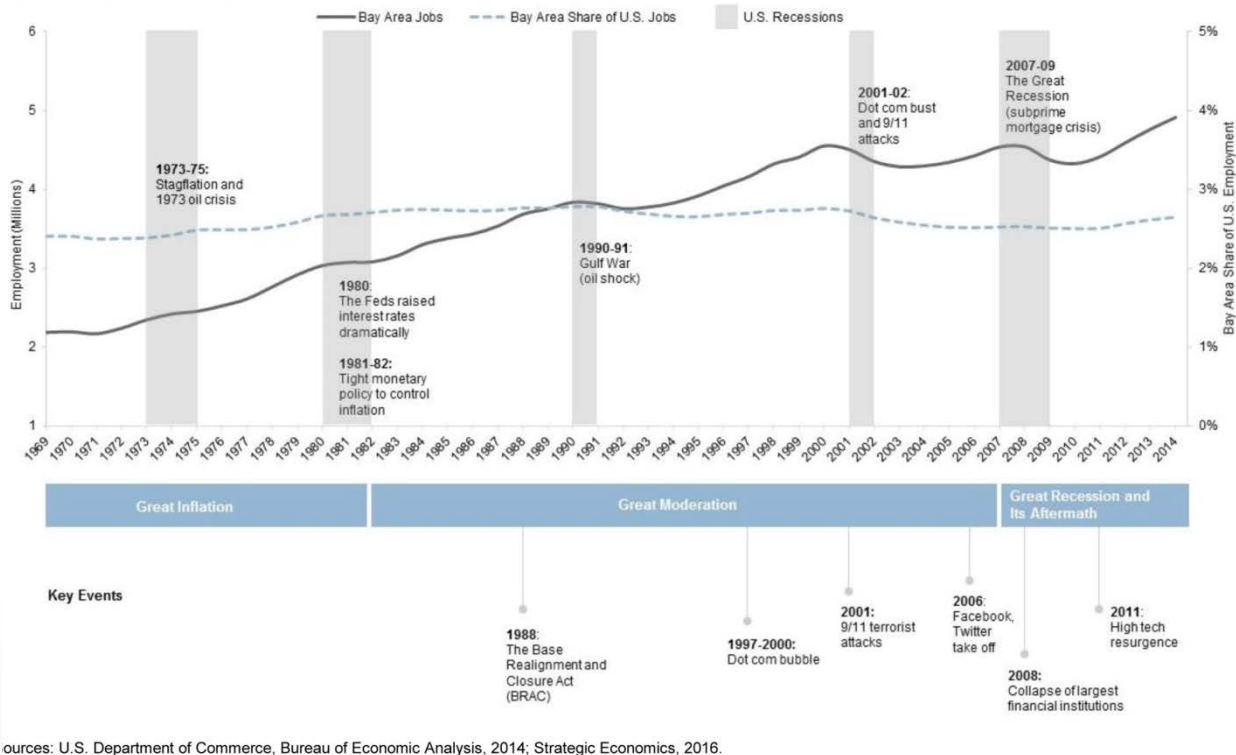
	<u>Units</u>
Under Construction	8,816
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Under Review	<u>21,734</u>
	62,096

Job Growth Rates: Bay Area

The region...

...grew annually 3.4% vs 1.8% in US between 2010-2014

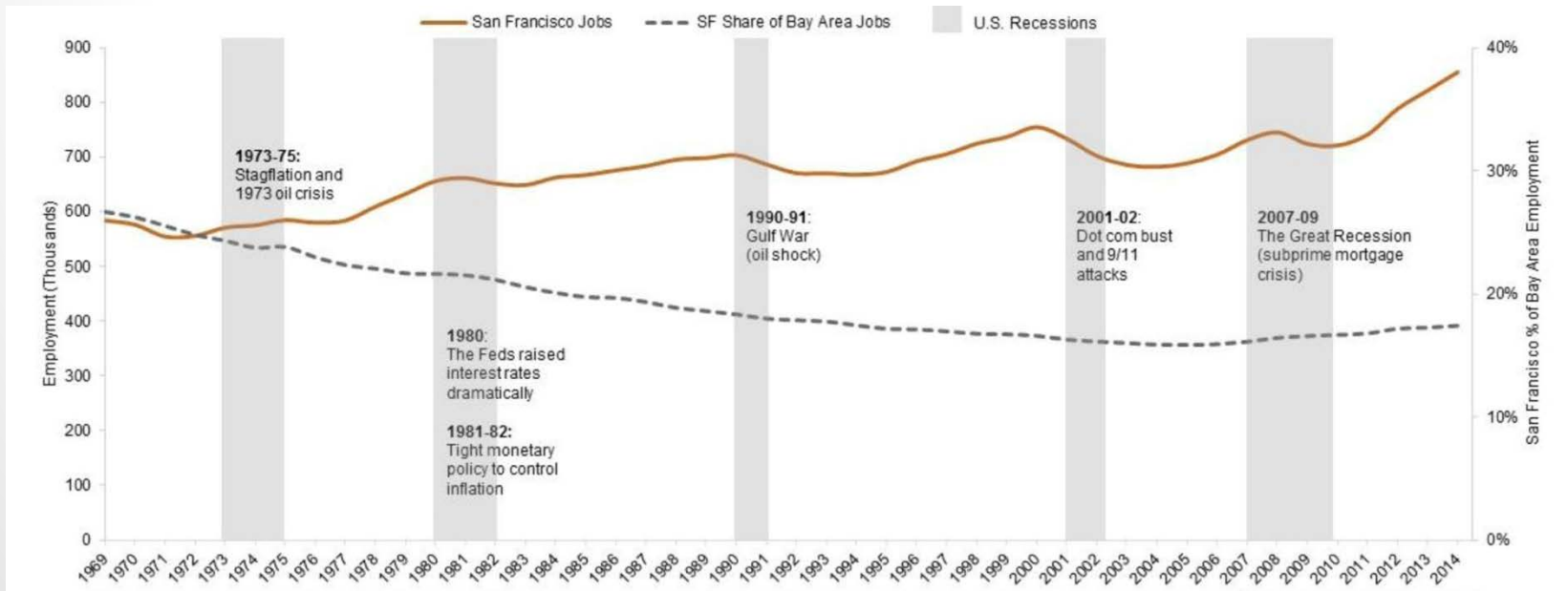
...surpassed in 2012 previous high water mark (in 2001) for total jobs



ources: U.S. Department of Commerce, Bureau of Economic Analysis, 2014; Strategic Economics, 2016.

Job Growth Rates: SF

- 1975-2014: + 6,500 jobs/year (4 recessions)
- 1995-2014: + 7,500 jobs/year (2 recessions)
- 2005-2014: + 13,000 jobs/year (1 recession)
- 2010-2014: + 30,000 jobs/year (0 recessions)



Plan Bay Area Projections (2010-2040): Job Growth

- Adopted 2013 PBA

Region: 1.1m jobs

SF: 191K jobs

(17% of region)

- Actual Growth: 2010-2014

Region: 585K jobs

SF: 120K jobs

(20% of region)

- Draft 2017 PBA

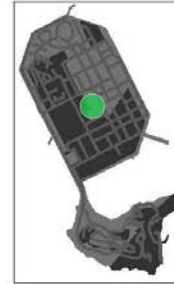
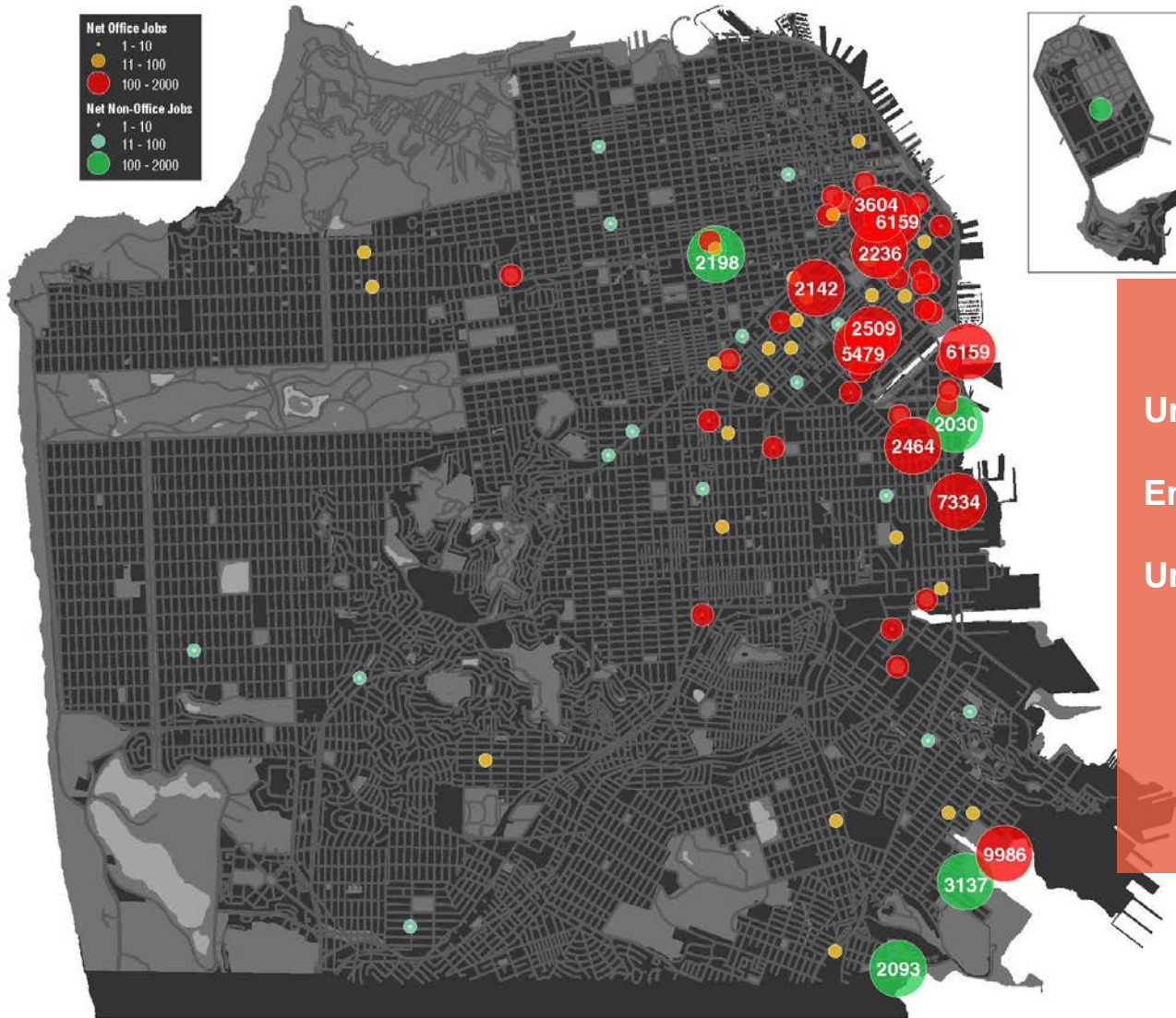
Region: 1.3m jobs

SF: 245-266K jobs

(19-20% of region)



Commercial Pipeline (Q2 2016)



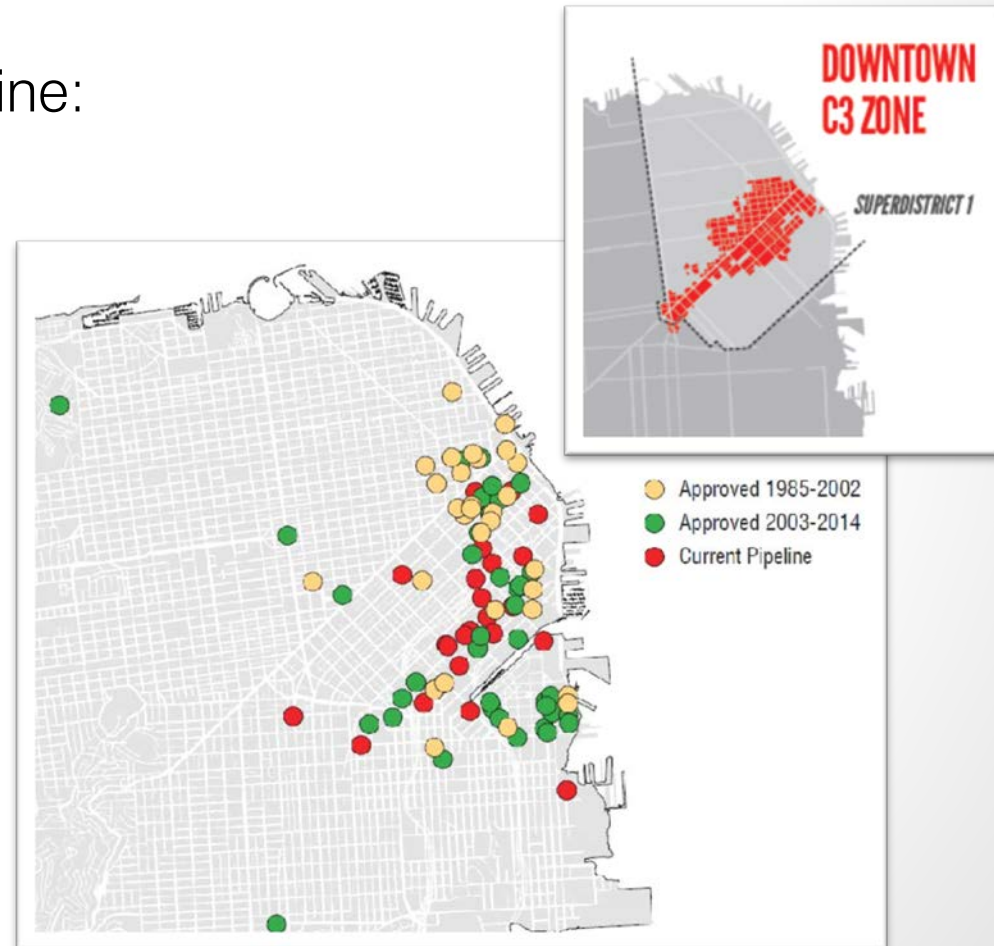
	<u>Square Feet</u>
Under Construction	5.0 m
Entitled	8.0 m
Under Review	<u>10.4 m</u>
	23.4m
<i>= Approx. 80,000 jobs</i>	

SF Office Trends: Geography of New Space

- From 1985-2002 75% of office allocation was in C-3
- From 2002-2015 40% of office allocation was in C-3
- Current proposed office pipeline:
 - 10% (1.0m gsf) in C-3
 - 50% (5.2m gsf) in Central SoMa
 - 40% (4.1m gsf) in other areas

Capacity for further major office development and job growth related to new development in C-3 is *very low* beyond existing pipeline...

though *densification* of occupancy is wild card!





CHALLENGE NO.1

REMAINING AN EQUITABLE AND INCLUSIVE CITY

Retaining families and people of all incomes and walks of life is our overriding issue. Housing prices and rents are now the highest of any major city in the country. We are experiencing displacement of low income residents to other parts of the Bay Area and beyond. If this continues will San Francisco be able to retain its soul?

Aggressive actions are needed to assure:

Affordable housing in all neighborhoods.

Access to parks and community places in every neighborhood.

Equitable access to public transportation.

Retention of living wage jobs for those without higher education.

Enhanced job training and job readiness.



CHALLENGE NO.2

ACCESS AND MOBILITY

San Francisco is at a tipping point – further congestion and delays will have severe consequences for continued job growth and will further compromise people’s daily lives. We need a major shift in our thinking about transportation and a new generation of robust investments in 21st century mobility.

Better regional transit connections to support commuters.

Better city mobility systems for enabling residents to get around.

Better bicycle and pedestrian accommodation.

Bringing neighborhood services closer to people, so they can walk to them.

CHALLENGE NO.3

RESILIENCY AND LONG-TERM SUSTAINABILITY

Global threat of climate change, sea level rise, and earthquake vulnerability means that:

Businesses, homes, and public infrastructure are at risk.

Careful solutions are needed to realize the growth that is planned for our vulnerable eastern shoreline.

Planning for change and empowering communities is critical to creating a resilient future.



CHALLENGE NO.4

PLACE-MAKING

San Francisco is a beautiful city – due in part to its magnificent setting and in part to its crafting of buildings and public spaces in the century between 1850 and 1950. As the city now “densifies”, building whole new neighborhoods and retrofitting established ones, we must pay particular attention to making these places highly livable:

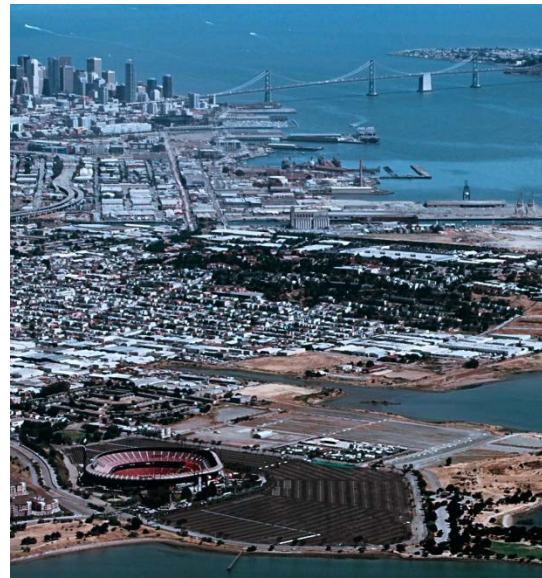
Reclaiming streets and rights of way for people.

Well designed buildings that accommodate active ground floors and “third spaces” where people informally congregate and socialize.

Providing mobility options.

Integrating “green infrastructure”.

FIVE PLACE-BASED INITIATIVES



THE HEART OF SAN FRANCISCO

Make our civic commons welcoming to everyone.

Create vibrant, world-class public spaces.

Build partnerships to bring art, culture and innovation to Market St.

Connect neighborhoods.

Envision the future of transportation.

A CITY OF NEIGHBORHOODS

Meet most daily needs within walking distance.

Build on unique neighborhood character.

Provide housing for all.

Promote inter-connectedness.

Build strong communities.

NEXT GENERATION SF

Planning space for growth.

A 21st century transportation strategy.

Diverse neighborhoods and economic uses.

A world class open space network.

Sustainable and resilient systems.

A RESILIENT WATERFRONT

Engage people in the waterfront experience (and planning).

Create a waterfront that responds to sea level rise.

Forge partnerships for action.

Ensure that our waterfront communities are equitable, diverse and whole.

Partner with other cities across the Bay to advance the art of adaptation.

BRIDGING THE BAY

Expanding capacity for jobs and housing.

Seizing opportunities for increased mobility.

Leadership in resiliency and adaptation.

Linking arts and culture across the Bay.

THANK YOU

www.sfplanning.org



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