



Office of the Controller Budget and Analysis Division Office of Economic Analysis

Economic Impact Report of Residential Inclusionary Affordable Housing Requirements File No. 061529

Proposed Ordinance Main Features:

Amends Planning Code Sections 313.6 and 315:

- Modifies certain definitions related to income and sale price calculation.
 - Defines affordable housing as a unit of housing priced such that the payment is no greater than 33 percent of annual household size-adjusted gross income, assuming a down payment recommended by the Mayor's Office of Housing (MOH) in its Procedures Manual.
 - Defines a qualifying household as a group of dwellers with "moderate" income.
 - Moderate income household dwellers earn annual gross income in the range of 80 to 120 percent of county median income, adjusted for household size.
 - Only these dwellers can buy affordable housing units by satisfying other requirements detailed in the Mayor's Office of Housing Procedures Manual.
- Reduces affordable housing unit requirement formula to start from 5-units—versus the current threshold of 10-units.
- Decreases the on-site requirement for affordable housing for specified residential developments of more than 120 feet in height from 15 percent to 12 percent of the total units in a project—with rounding up as of 0.5 units, assuming other conditions do not apply.
- Decreases the off-site requirement for affordable housing for specified residential developments of more than 120 feet in height from 20 percent to 17 percent of the total units in a project—with rounding up as of 0.5 units, again assuming other conditions do not apply.
- Considers renewing, upon further review in five years, the proposed reductions in thresholds for residential buildings taller than 120 feet.
- Establishes preference in the lottery for people who live and work in San Francisco.
- Provides updated guidelines for the affordable housing in-lieu fee.
- Allows the Mayor's Office of Housing to expend funds for a study to periodically update in-lieu fee.
- Changes the amount of time an ownership unit shall remain affordable.
- Amends certain monitoring and study obligations.
- Amends 313.6 to make adjustments in the in-lieu fee for the corresponding program methodology used for the Residential Inclusionary Affordable Housing Program.

Summary Findings:

- If passed, the ordinance would have a moderately favorable impact on developers of housing over 120 feet in height already in the pipeline, and a neutral to moderately adverse impact on developers of housing under 120 feet in height already in the pipeline. This ordinance has neutral impact on new housing developers applying for permits after January 1, 2006, the City's overall economy, employment, and City government.

January 24, 2007

Executive Summary

Stakeholder	Qualitative Net Benefit Ranking				
	Extreme Adverse Impact	Moderate Adverse Impact	Neutral	Moderate Favorable Impact	Extreme Favorable Impact
City Economy			■		
Developer of Housing over 120 Feet in Height Already in the Pipeline ¹				■	
Developer of Housing under 120 Feet in Height Already in the Pipeline			■		
Developers of New Housing applying after January 1, 2006			■		
Employment			■		
City Government			■		

Conclusions

The proposed ordinance has a moderately favorable impact on developers of new housing over 120 feet in height already in the pipeline. The ordinance applies prior thresholds to the most recent changes in inclusionary laws (was formerly 12% on-site or 17% off-site). This benefit is partially offset by the reduction of threshold requirement in calculating the inclusionary requirement to start from the 5th unit built (versus the current start of 10-units).

The ordinance would have a neutral to moderate adverse impact on developer of housing under 120 feet in height already in the pipeline because of the reduction of threshold requirement in calculating the inclusionary requirement to start from the 5th unit built (versus the current start of 10-units).

This ordinance has neutral impact on new housing developers applying after January 1, 2006, City's economy, employment, and City government.

¹ "Already in the pipeline" refers to projects with applications submitted to Planning Department prior to January 1, 2006.

Economic Scorecard

Stakeholder	If Ordinance Passes	Status Quo
City Economy	<p>Neutral</p> <ul style="list-style-type: none"> The proposed ordinance may not change the number of market-rate or affordable units developed citywide. It simply reduces inclusionary thresholds for qualifying housing developments to previous (lower) limits. Few affordable units are expected from lowering the formula provisions for measuring inclusionary affordable housing units—which start from 5-units, rather than 10-units.² 	<ul style="list-style-type: none"> A city with affordably priced housing is better able to retain resident workers within their jurisdiction. A resident workforce has positive spillover economic benefits in transportation, for example. It also promotes higher levels of economic activity over extended hours. Current City housing market conditions are weakening slightly.
Developer of Housing over 120 Feet in Height Already in the Pipeline ³	<p>Moderately Favorable Impact:</p> <ul style="list-style-type: none"> Developers of projects over 120 feet tall would benefit from applying previous, lower affordable housing thresholds. Approximately 500 units in two developments qualify under the exemption provisions of this ordinance. Affordable housing in-lieu fee savings of as much as 39.8 percent, or on-site affordable unit development savings of up to 19.2 percent, or off-site affordable unit development savings of up to 12.5 percent. (See Table 1 in Appendix A). 	<ul style="list-style-type: none"> Developers with pipelined projects not yet under construction may postpone projects until housing market conditions improve. If affordable housing unit thresholds are perceived as too strict by developers, then less construction results.

² According to the City Planning Department's Pipeline Report, 4th Quarter 2005, two projects with 500 total units received Planning or Building Inspection permits that are likely to qualify for earlier (lower) inclusionary affordable housing unit requirements.

³ "Already in the pipeline" refers to projects with applications submitted to Planning Department prior to January 1, 2006.

Stakeholder	If Ordinance Passes	Status Quo
Developer of Housing under 120 Feet in Height Already in the Pipeline	<p>Neutral to Moderately Adverse Impact:</p> <ul style="list-style-type: none"> The key effect from this proposed ordinance on this category of developments in the pipeline arises from changing the affordable units count formula by starting to count from the 5th unit in a project, rather than (the current standard) from the 10th unit. Since only 1.7 percent pipeline projects have 5 to 10 units (See Table 2 in Appendix A), the impact of this provision is moderately adverse—but may be more onerous to certain developments for which rounding results in one extra affordable unit required to be affordable. (See Appendices B and C for dollar and dwelling unit magnitude of the effect). 	<ul style="list-style-type: none"> All units would be subject to the inclusionary thresholds recently adopted if this proposed ordinance is not passed. That is, nearly 5,100 of the 5,571 units approved for construction before January 1, 2006, would be subject to the new, higher on-site or off-site thresholds for inclusionary affordable housing.
Developers of New Housing applying after January 1, 2006 ⁴	<p>Neutral:</p> <ul style="list-style-type: none"> There are no pipelined projects after January 1, 2006 that would be materially impacted by the proposed ordinance. Even if such projects existed, the added burden to a developer would amount to at most one extra affordable unit, or the in-lieu fee amount equivalent to the extra unit for developments of 9 or more units, because of the rounding requirements. 	<ul style="list-style-type: none"> Market conditions for further housing development are deteriorating with short-term market home price declines.
Employment	<p>Neutral:</p> <ul style="list-style-type: none"> The impact to City employment is minimal. 	<ul style="list-style-type: none"> Job growth in the City may be mildly affected by inclusionary affordable housing policy, to the extent that availability of affordable workforce housing increases.
City Government	<p>Neutral:</p> <ul style="list-style-type: none"> There are no substantial incremental costs to City government to implement this proposed ordinance. Some additional in-lieu fee revenue would however be generated for use in affordable housing projects. 	<ul style="list-style-type: none"> Not implementing the favorable exemptions for tall residential developments contained in the proposed ordinance may reduce expected affordable units built, or the corresponding in-lieu fee revenues.

⁴ All projects-regardless of size.

Appendix A: Project Impact Illustration for Large Projects Over 120 Feet

Table 1 illustrates the effect of the proposed ordinance on two projects of height exceeding the 120-foot threshold. The ordinance does not affect the in-lieu fee rate, but does impact the final amount that a developer must pay if they choose the in-lieu fee, over building units on-site or off-site. The proposed ordinance reduces the number of affordable units required in projects — on-site or off-site — to thresholds in place prior to August 2006.

Table 1: Comparison of Potential Proposed Ordinance’s Effects on Large projects (over 120 feet tall) in the pipeline prior to January 1, 2006:

Existing Requirements, as of 10-unit projects			
Units	On-Site(15%)	Off-Site(20%)	In-Lieu Fee (20%-weight)
80	11	14	\$3,039,195
420	62	82	\$13,814,809
On 500 Units in Two Projects	73	96	\$16,854,004
Proposed Requirements, as of 5-unit projects			
Units	On-Site(12%)	Off-Site(17%)	In-Lieu Fee (20%-weight)
80	9	13	\$3,256,280
420	50	71	\$13,983,282
On 500 Units in Two Projects	59	84	\$17,239,562
Difference	-14	-12	\$385,559
Percent	-19.2%	-12.5%	2.3%

Fewer affordable units required in proposed ordinance than existing regulations.

Higher In-Lieu Fee Revenues

Table 2 includes a count of dwelling units in the pipeline. As of January 1, 2006, 386 additional dwellings are impacted by recently adopted changes to the inclusionary affordable housing thresholds, or 1.7 percent of the total dwelling units in the pipeline. The impact of modifying the formula for computing the affordable unit requirement on the pipeline is slight. Modest adverse impact accrues to developers of projects with 5 to 9 dwelling units.

Table 2: Additional Pipeline Units Affected by Change in Formula

	Gross Dwelling Units	Net Additional Dwelling Units
5 or more units	23,387	22,803
10 or more units	22,989	22,417
difference = 5 to 9 units	398	386
% of units affected	1.7%	1.7%

Appendix B: Project Impact Illustration for Mid- to Large- Projects Under 120 Feet, or Permitted After January 1, 2006

Simulated Projects under 120 Feet: the following three mid-to-large Projects (U, V and W) contain roughly 150 dwelling units. They differ in the number of units for different dwelling sizes by the number of bedrooms (BR).

Project	Number of Units in Project				Total Units	Approx. Market \$
	Studios	1BR	2BR	3BR		
In-Lieu Fees	\$116,031	\$173,633	\$250,913	\$356,959		
Est. Market Value	\$450,000	\$550,000	\$660,000	\$850,000		
Project U	0	50	0	0	50	\$ 27,500,000
Project V	2	40	20	0	62	\$ 36,100,000
Project W	20	20	0	1	41	\$ 20,850,000
Total	22	110	20	1	153	\$ 84,450,000

As reflected in the table below, under current law, these projects would have to include either 19 on-site units or 24 off-site units as affordable housing units (15% or 20% of the 153 total dwellings under construction).

Existing Inclusionary Requirement	On-Site		Off-Site			
	15%		20%			
Project	# Of Units	Formula	# Of Units	Formula	In Lieu Fee	Formula
Project U	6	15%*(50-10)	8	20%*(50-10)	\$ 1,389,064	8*(1)/50
Project V	8	15%*(62-10)	10	20%*(62-10)	\$ 1,967,039	10*(1)/62
Project W	5	15%*(41-10)	6	20%*(41-10)	\$ 900,035	6*(1)/41
Total	19		24		\$ 4,256,138	

(1) is the weighted average of the unit mix being developed, by the in-lieu fee schedule from MOH.
Note that the formula may result in projects with more units paying a smaller fee as a percent of market value.

The proposed ordinance would effect a change in the way the computation of affordable units would be made. The net effect would be to increase the number of units required to be sold as affordable units. Either 21 units on-site or 27 units off-site would be developed. This means that the proposed ordinance would increase the inclusionary requirement by either 2 on-site or 3 off-site units (1 additional per project on average).

Proposed Inclusionary Requirement under 061529	On-Site		Off-Site			
	15%		20%			
Project	# Of Units	Formula	# Of Units	Formula	In Lieu Fee	Formula
Project U	7	15%*(50-5)	9	20%*(50-5)	\$ 1,562,697	9*(1)/50
Project V	9	15%*(62-5)	11	20%*(62-5)	\$ 2,163,743	11*(1)/62
Project W	5	15%*(41-5)	7	20%*(41-5)	\$ 1,050,041	7*(1)/41
Total	21		27		\$ 4,776,481	

(1) is the weighted average of the unit mix being developed, by the in-lieu fee schedule from MOH.
Note that the formula may result in projects with more units paying a smaller fee as a percent of market value.

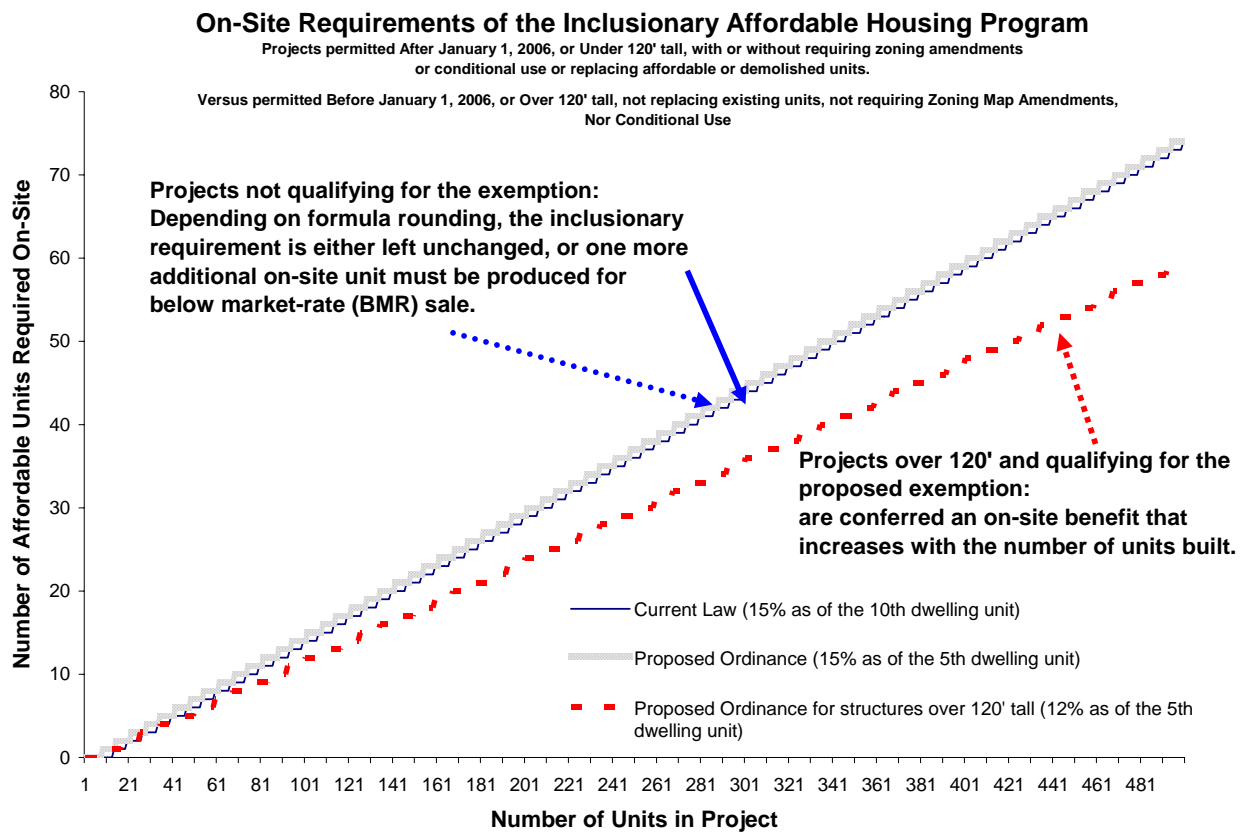
The above makes the assumption that these projects will continue even if more units must be sold below prevailing market prices (BMR). It is possible that the developer may opt to pay the in-lieu fee and attempt to pass through the higher development costs to the market rate buyers, assuming that market conditions may permit such pass through. This is harder to do when market prices for units are leveling or in some cases declining. It is also possible, in some cases, that dwelling

construction may no longer be feasible, based upon developers' assumptions regarding market conditions.

The two changes to calculating inclusionary affordable housing requirements⁵ proposed by this legislation combine to reduce inclusionary requirements for large projects (in buildings over 120 feet tall), that are already in the pipeline prior to January 1, 2006. For the benefits to accrue, these projects must not require zoning map amendments, conditional use, or replace demolished or other-affordable housing. The proposed ordinance relaxes the inclusionary requirement in either instance – on-site or off-site.

Projects that are not conferred the benefits associated with this proposed ordinance, are effectively subject to the existing inclusionary thresholds. As a result of starting the inclusionary computation as of the fifth unit of a project, some projects (mainly those proposed with nine units) appear to be subject to additional affordable units, resulting in moderate adverse impact.

These increases may result in a slowdown in unit completions, a decline in net additions to the housing stock, or in observed, future building permit (and construction) activity. These risks are possible because smaller projects are not as well capitalized as larger projects.

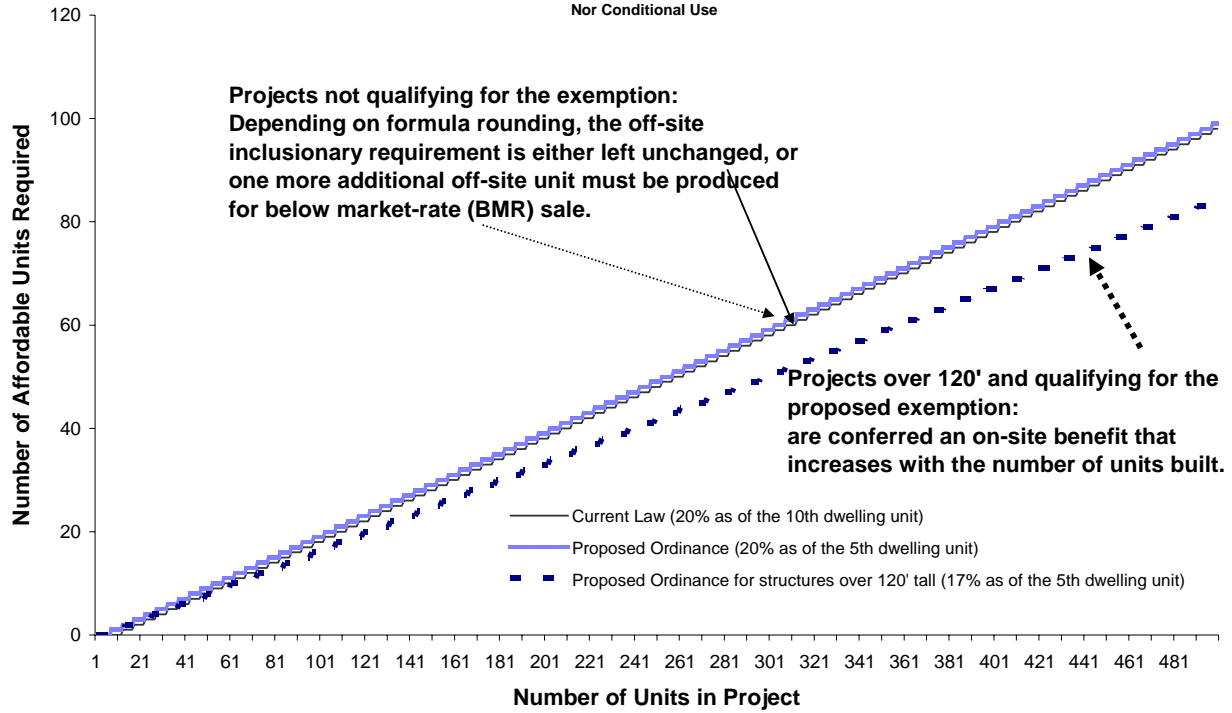


⁵ The two changes are (1) reduction of on-site and off-site requirements for buildings over 120 feet, and (2) the lowering of the number of units from 10 units to 5 units in the formula used to arrive at the required affordable housing unit count.

Off-Site Requirements of the Inclusionary Affordable Housing Program

Projects permitted After January 1, 2006, or Under 120' tall, with or without requiring zoning amendments or conditional use or replacing affordable or demolished units.

Versus permitted Before January 1, 2006, or Over 120' tall, not replacing existing units, not requiring Zoning Map Amendments, Nor Conditional Use



Appendix C: Project Impact Illustration for Small Projects Under 10 units

Under existing law, small projects of 5 to 9 dwelling units do not have any inclusionary requirements—on-site, off-site or in-lieu fees.

Examples of In-Lieu Fee Calculations under Existing Ordinance, For Small Projects (5 to 9 Dwelling Units)						
Small Projects Under Existing Ordinance	Number of Units in Project				Total Units	Approx. Market \$
	Studios	1BR	2BR	3BR		
In-Lieu Fees	\$116,031	\$173,633	\$250,913	\$356,959		
Est. Market Value	\$450,000	\$550,000	\$660,000	\$850,000		
Simple - 5 units	0	5	0	0	5	\$ 2,750,000
Mix A - 6 units	0	4	2	0	6	\$ 3,520,000
Mix B - 7 units	0	3	4	0	7	\$ 4,290,000
Mix C - 8 units	2	4	2	0	8	\$ 4,420,000
Mix D - 9 units	6	2	0	1	9	\$ 4,650,000

Calculating In Lieu Fee Under Existing Ordinance	20% of Units as of the 10th Dwelling Unit		
# of Units	Units under Round-off Rule	Units without Applying Round-off Rule	Best Choice for In-Lieu Fee Calculation
5	0	0.00	0.00
6	0	0.00	0.00
7	0	0.00	0.00
8	0	0.00	0.00
9	0	0.00	0.00

Small Projects Under Existing Ordinance	On Site (15%) # of Units ^a	Off Site (20%) # of Units ^b	In Lieu Fee (20%) Amount ^c
Simple - 5 units	0	0	\$0
Mix A - 6 units	0	0	\$0
Mix B - 7 units	0	0	\$0
Mix C - 8 units	0	0	\$0
Mix D - 9 units	0	0	\$0

N = number of dwelling units in the project

(a) Formula to compute on-site unit requirement involves: $15\% \times (\# \text{ of dwelling units} - 10 \text{ unit threshold})$, rounded to the nearest whole number: $\text{MAX}(\text{ROUND}(15\% \times (N-10), 0), 0)$

(b) Formula to compute off-site unit requirement involves: $20\% \times (\# \text{ of dwelling units} - 10 \text{ unit threshold})$, rounded to the nearest whole number: $\text{MAX}(\text{ROUND}(20\% \times (N-10), 0), 0)$

(c) Formula to compute in-lieu fee involves: weighted average of the unit mix being developed, by the inlieu fee schedule from MOH \times (smaller number of either the off-site requirement or the unrounded off-site unit requirement) = $\text{min}(\text{roundoff}, \text{units}) \times (f)$

$\text{min}(\text{roundoff}, \text{units})$ = smaller of the two numbers yields in lieu fee factor.

(f) is the weighted average of the unit mix being developed, by the inlieu fee schedule from MOH.

Formula leads to projects with 5 to 9 units bearing no inclusionary costs because threshold in existing formula "as of 10th unit" rounds to zero.

The proposed ordinance alters the formula for inclusionary requirement by lowering the starting point from which the inclusionary requirement is counted—starting from the 5th dwelling unit in a project, rather than the 10th unit. This proposed ordinance increases the inclusionary requirements—and thus the development costs—of certain projects with 8 or 9 dwelling units.

Examples of In-Lieu Fee Calculations under Proposed File 061529 For Small Projects (5 to 9 Dwelling Units)						
Small Projects Under Proposed Ordinance	Number of Units in Project				Total Units	Approx. Market \$
	Studios	1BR	2BR	3BR		
In-Lieu Fees	\$116,031	\$173,633	\$250,913	\$356,959		
Est. Market Value	\$450,000	\$550,000	\$660,000	\$850,000		
Simple - 5 units	0	5	0	0	5	\$ 2,750,000
Mix A - 6 units	0	4	2	0	6	\$ 3,520,000
Mix B - 7 units	0	3	4	0	7	\$ 4,290,000
Mix C - 8 units	2	4	2	0	8	\$ 4,420,000
Mix D - 9 units	6	2	0	1	9	\$ 4,650,000

Calculating In Lieu Fee Under Proposed Ordinance	20% of Units as of the 5th Dwelling Unit		
# of Units	Units under Round-off Rule	Units without Applying Round-off Rule	Best Choice for In-Lieu Fee Calculation
5	0	0.00	0.00
6	0	0.20	0.00
7	0	0.40	0.00
8	1	0.60	0.60
9	1	0.80	0.80

Small Projects Under Proposed Ordinance	On Site (15%) # of Units ^a	Off Site (20%) # of Units ^b	In Lieu Fee (20%) Amount ^c
Simple - 5 units	0	0	\$0
Mix A - 6 units	0	0	\$0
Mix B - 7 units	0	0	\$0
Mix C - 8 units	0	1	\$107,132
Mix D - 9 units	1	1	\$124,481

N = number of dwelling units in the project

(a) Formula to compute on-site unit requirement involves: $15\% \times (\# \text{ of dwelling units} - 5 \text{ unit threshold})$, rounded to the nearest whole number: $\text{MAX}(\text{ROUND}(15\% \times (N-5), 0), 0)$

(b) Formula to compute off-site unit requirement involves: $20\% \times (\# \text{ of dwelling units} - 5 \text{ unit threshold})$, rounded to the nearest whole number: $\text{MAX}(\text{ROUND}(20\% \times (N-5), 0), 0)$

(c) Formula to compute in-lieu fee involves: weighted average of the unit mix being developed, by the inlieu fee schedule from MOH \times (smaller number of either the off-site requirement or the unrounded off-site unit requirement) = $\text{min}(\text{roundoff, units}) \times (1)$.

$\text{min}(\text{roundoff, units})$ = smaller of the two numbers yields in lieu fee factor.

(1) is the weighted average of the unit mix being developed, by the inlieu fee schedule from MOH.

Note: the rounding formula may produce inconsistent results in projects with 8 units.

For example, developments with five to eight units will still not be required to provide any on-site affordable dwelling units. But developments with nine units would be required to provide:

- one on-site unit, or
- one off-site unit, or
- pay an in-lieu fee of approximately \$124,481

as noted in the example above.

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