Sites Inventory Appendix B3: Non-Vacant Site Residential Development Case Studies

ADOPTED - January 2023

Prepared as Part of the San Francisco Planning Department's

Housing Element Update 2022



Summary of Non-Vacant Site Residential Development Case Studies

The City of San Francisco is home to many successful redevelopments of non-vacant sites into housing. Non-vacant sites are sites that have an existing use, either residential or commercial, including parking and sites with vacant buildings. Strategic Economics selected case studies, presented in this appendix, which are representative of the range of contexts in which developments into housing – including affordable housing – occurred based on the following factors: site size (including sites smaller than a half-acre), number of units, geographic distribution, and affordability levels. These case studies represent projects that were built between 2018 and early 2022.

San Francisco's Inclusionary Housing Program requires that all residential projects with ten or more units contribute to the program through one of the following options: 1) reserve a percentage of units in the new building to be rented or sold at a below market rate 2) reserve a percentage of units in another building they build to be rented or sold at a below market rate 3) pay a fee 4) dedicate land that will become affordable housing 5) a combination of the options. Redevelopment projects that have produced housing run the spectrum of affordability, and the case studies include projects that are completely market rate but which fulfilled their inclusionary housing obligations through a fee payment, on-site inclusionary units, and 100 percent affordable housing.

Strategic Economics identified case studies by matching the locations of demolitions to the locations of housing production utilizing demolition permit data and housing production data provided by the City of San Francisco. Regardless of when the demolition occurred, only sites that had new housing construction since 2018 were considered as potential case studies to reflect recent trends. Potential case studies were identified using both addresses and parcel numbers, and details regarding development locations were verified using the City's property information portal. Strategic Economics identified over 120 potential case studies, but due to incomplete data, including occasional address and parcel number changes, this is likely an undercount of how many non-vacant sites have had a development project to new housing since 2018. Strategic Economics chose 27 of the 120 potential case studies to demonstrate the various contexts in which non-vacant site development has occurred. The location of the chosen case studies is demonstrated in Figure 1.

Many of the largest redeveloped sites identified as potential case studies are centrally located in neighborhoods closer to Downtown, reflecting the general concentration of housing development which is clustered in areas such as the Financial District as well as SoMa, the Mission, and Mission Bay. In addition there are also example development case studies with a broader geographic distribution at various levels of intensity throughout the city. A limited number of the redeveloped sites are within Well-Resourced Neighborhoods (WRN), as designated by the State Department of Housing and Community Development, and most of the other sites are within areas designated by the City of San Francisco as Priority Equity Geographies (PEG); both geographies have served as spatial points of reference for this analysis. This document also refers to "Transition Areas" which are areas that are neither designated as

Well-Resourced Neighborhoods nor as Priority Equity Geographies. Major corridors, such as Van Ness Avenue and Market Street, have seen substantial development of non-vacant sites to housing. Developments have generally followed areas better served by transit, and many have been in areas with mixed-use or transit-oriented zoning designations.

Over 82 percent of the redeveloped sites that were identified for this analysis were on sites smaller than one-half acre. All developments profiled in these case studies had densities well in excess of 30 units per acre except for one single-family and one two-family project. Redeveloped sites that were previously industrial, retail, and auto-oriented uses tended to produce the highest intensity housing. Auto-oriented uses, such as gas stations, parking, and auto repair shops, accounted for a sizable amount of the redeveloped sites, indicating ongoing shifts from auto-oriented uses to higher intensity housing in mixed-use, transit-oriented, and walkable neighborhoods.

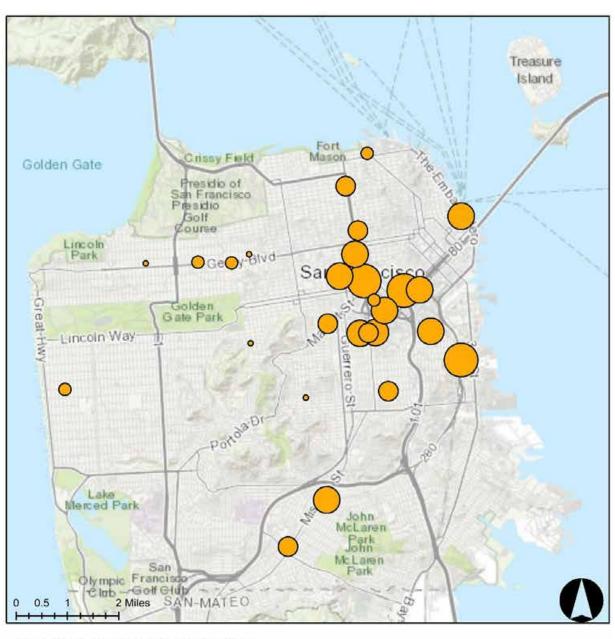
The case studies in this appendix are organized into three: market rate projects with more than 10 units that are subject to the City's Inclusionary Housing Program, market rate projects with less than 10 units that are not subject to Inclusionary, and 100 percent affordable housing. Each case study includes the following project information:

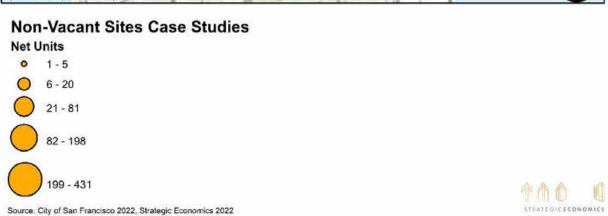
- 1. Address and project name
- 2. Short description of the development, including method for fulfilling inclusionary housing requirement if applicable
- 3. Neighborhood
- 4. Site size
- 5. Prior use
- 6. Year that the demolition permit was requested
- 7. Year that the housing construction was completed
- 8. Number of units
- 9. Density per acre
- 10. Number of stories of project
- 11. Zoning district
- 12. Other area designations, such as a cultural district
- 13. Pictures pre- and post- housing construction¹

3

¹ All photos in this document are from Google Maps Street View.

Figure 1. Case Study Locations by Number of Units





150 Van Ness Avenue – Van Ness Hayes



This site produced the greatest total number of units of the potential case studies identified for this analysis, and it provided on-site inclusionary units. The project is also the largest conversion of office space to housing built during this time period. This development demonstrates the ability to build on-site inclusionary units in PEG neighborhoods which are subject to multiple pressures creating neighborhood change.

Neighborhood:

Tenderloin

Site Size:

1.08 Acres

Prior Use:

Office

Demolition Permit Request Year:

2015

New Residential Construction Completed Year:

2018

Number of Units:

431

(381 market rate, 50 inclusionary)

Density per Acre:

400 units/acre

Number of Stories:

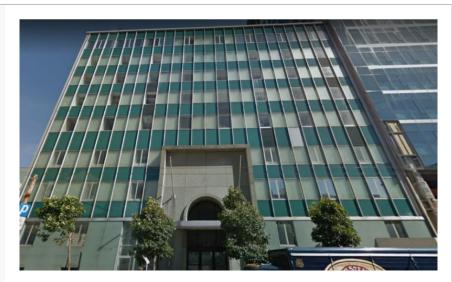
13

Zoning District:

C-3-G Downtown General

Other Designations:

PEG, Market and Octavia, and **Downtown Area Plan**



Before Construction: May 2014



After Construction: March 2022

1140 Harrison Street - Hanover Soma West



This site is one of the largest redeveloped sites included in this analysis, both by site size and by number of units produced. This site is representative of the major additions of housing happening in the SoMa neighborhood. This development project paid an inclusionary housing fee.

Neighborhood:

South of Market

Site Size:

1.72 Acres

Prior Use:

Auto Repairs

Demolition Permit Request Year:

2018

New Residential Construction Completed Year:

2021

Number of Units:

371

Density per Acre:

217 units/acre

Number of Stories:

7

Zoning District:

WMUG - Wsoma Mixed Use-General

Other Designations:

PEG, SoMa Pilipinas and Leather/LGBTQ Cultural **Districts**



Before Construction: March 2014



After Construction: April 2022

800 Indiana Street - Avalon Dogpatch

This site is another one of the largest developments in this analysis, by site size and number of units produced. This project is notable because it was an industrial use in what remains a primarily industrial area but which is envisioned to be a more mixed-use area. This development project paid an inclusionary housing fee.

Neighborhood:

Potrero Hill

Site Size:

2.51 Acres

Prior Use:

Manufacturing

Demolition Permit Request Year:

2015

New Residential Construction Completed Year:

2018

Number of Units:

326

Density per Acre:

130 units/acre

Number of Stories:

Zoning District:

UMU - Urban Mixed Use

Other Designations:

Transition Area, Central Waterfront Area Plan



Before Construction: November 2013



After Construction: April 2022

302 Silver Ave - Frank Residences at San Francisco Campus for Jewish Living



This is the largest redeveloped site in the case studies. This site is representative of the ability to situate a relatively dense residential project in an otherwise low-density neighborhood. By utilizing a special district, this conversion created nearly 200 units of permanent housing within a larger senior care development. This site was already owned by the San Francisco Campus for Jewish Living, and the new construction in 2020 replaced part of their existing buildings with the new housing.

Neighborhood:

Excelsior

Site Size:

7.45 Acres

Prior Use:

Office

Demolition Permit Request Year:

2017

New Residential Construction Completed Year:

2020

Number of Units:

198

Density per Acre:

27 units/acre

Number of Stories:

5

Zoning District:

RH-2 Residential House Two Family in special district "Jewish Home of San Francisco"

Other Designations:

Transition Area, Mayor's Invest in Neighborhoods Initiative Area



Before Construction: February 2011



After Construction: April 2022

1301 16th Street - Alta Potrero



This project is an example of a very dense use on a small site. This development is better aligned with the mixed-use nature of the neighborhood. This development project included on-site inclusionary units.

Neighborhood:

Mission Bay

Site Size:

0.02 Acres

Prior Use:

Warehouse

Demolition Permit Request Year:

2017

New Residential Construction Completed Year:

2020

Number of Units:

172

(144 market rate, 28 inclusionary)

Density per Acre:

9,513 units/acre

Number of Stories:

6

Zoning District:

UMU - Urban Mixed Use

Other Designations:

Transition Area, Showplace Square/Potrero Hill Area Plan



Before Construction: May 2013



After Construction: April 2022

555 Fulton Street



This development appears to have resulted from consolidation of three separate parcels, all of which were used for various auto repair and storage uses. This development project included on-site inclusionary units. The prior use was incompatible with the neighborhood's predominately residential character, and this project introduces a large number of market rate units directly across the street from public housing. Given this location, the project's overall size, and the 13 percent on-site inclusionary units, which is a relatively high percentage compared to other projects included in this analysis, this case study demonstrates the market strength of the expanding Hayes Valley district.

Neighborhood:

Hayes Valley

Site Size:

1.02 Acres

Prior Use:

Auto Repairs

Demolition Permit Request Year:

2013

New Residential Construction Completed Year:

2019

Number of Units:

(122 market rate, 17 inclusionary)

Density per Acre:

137 units/acre

Number of Stories:

Zoning District:

RTO - Residential Transit Oriented District and NCT Hayes NCT

Other Designations:

Transition Area, Market and Octavia Area Plan



Before Construction: November 2013



After Construction: May 2021

830 Eddy Street - Vance



This development in a high-density area redeveloped a small underutilized parcel where the previous use was not aligned with the transit-oriented goals of the area zoning. The project also created additional housing within the PEG designation and the Van Ness Corridor Area Plan. This development project included on-site inclusionary units.

Neighborhood:

Western Addition

Site Size:

0.30 Acres

Prior Use:

Parking Garage, Public

Demolition Permit Request Year:

2017

New Residential Construction Completed Year:

2021

Number of Units:

(117 market rate, 20 inclusionary)

Density per Acre:

452 units/acre

Number of Stories:

12

Zoning District:

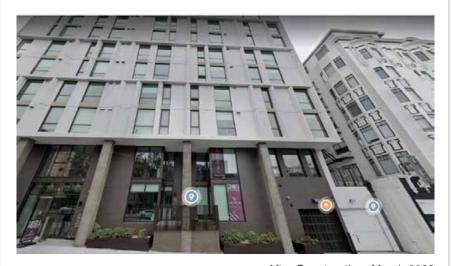
RC-4 Residential Commercial High Density

Other Designations:

PEG, Van Ness Corridor Area Plan



Before Construction: November 2013



After Construction: March 2022

1532 Harrison Street - HQ

This housing development is a good example of the many sites being shifted from an auto-oriented use to housing in a mixed-use neighborhood that is rapidly absorbing additional housing through redeveloped sites. This development project included on-site inclusionary units.

Neighborhood:

Mission

Site Size:

0.53 Acres

Prior Use:

Parking Garage, Private

Demolition Permit Request Year:

2017

New Residential Construction Completed Year:

2021

Number of Units:

(114 market rate, 22 inclusionary)

Density per Acre:

257 units/acre

Number of Stories:

7

Zoning District:

WMUG - Wsoma Mixed-Use General

Other Designations:

PEG, Leather and LGBTQ **Cultural District, Western SoMa** Area Plan



Before Construction: February 2014



After Construction: April 2022

75 Howard Street - One Steuart Lane



This site is representative of the ongoing transformation occurring in one of San Francisco's primary business districts to create a better balance between office and residential uses in a mixed-use, walkable, and transit-oriented context. This development project paid an inclusionary housing fee.

Neighborhood:

Financial District/South Beach

Site Size:

0.47 Acres

Prior Use:

Parking Garage/Storage

Demolition Permit Request Year:

2017

New Residential Construction Completed Year:

2021

Number of Units:

120

Density per Acre:

256 units/acre

Number of Stories:

20

Zoning District:

C-3-O (SD) Downtown Office **Special Development**

Other Designations:

Transition Area, Transit Center District, Northeast Waterfront, and Downtown Area Plan



Before Construction: April 2011



After Construction: March 2022

5050 Mission Street - ChesHill on Mission



This redeveloped site is notable due to its size and location in a more marginal neighborhood which has not had as much market interest as neighborhoods closer to the city's major office concentrations. This site demonstrates the potential to add additional housing in places with moderate market strength throughout the city. This development project included onsite inclusionary units.

Neighborhood:

Outer Mission

Site Size:

0.58 Acres

Prior Use:

Retail Sales

Demolition Permit Request Year:

2015

New Residential Construction Completed Year:

2018

Number of Units:

(52 market rate, 9 inclusionary)

Density per Acre:

105 units/acre

Number of Stories:

Zoning District:

NCD - Excelsior Outer Mission Street Neighborhood Commercial District

Other Designations:

PEG, Mayors Invest in **Neighborhoods Initiative Area**



Before Construction: April 2011



After Construction: March 2022

2100 Market Street



This property demonstrates development of a low-density commercial use to a moderately dense housing project on a small parcel in close proximity to multiple major transit lines. This particular development is at a very transit rich location offering easy access to every light rail line in the city of San Francisco. This development project included on-site inclusionary units.

Neighborhood:

Castro/Upper Market

Site Size:

0.24 Acres

Prior Use:

Food/Beverage Handling

Demolition Permit Request Year:

2016

New Residential Construction Completed Year:

2019

Number of Units:

(53 market rate, 7 inclusionary)

Density per Acre:

247 units/acre

Number of Stories:

Zoning District:

NCT - Upper Market **Neighborhood Commercial Transit**

Other Designations:

WRN, Castro Cultural District, Mayor's Invest in Neighborhoods Initiative Area, **Market and Octavia Area Plan**



Before Construction: July 2015



After Construction: May 2022

2465 Van Ness Avenue - Union House



This site was the largest development in the Marina neighborhood in recent years. The intensification from a filling station to a multifamily housing development is well-aligned with the zoning and development patterns along the Van Ness corridor. This development project paid an inclusionary housing fee and provided some off-site below market rate units.

Neighborhood:

Marina

Site Size:

0.38 Acres

Prior Use:

Filling/Service Station

Demolition Permit Request Year:

2018

New Residential Construction Completed Year:

2020

Number of Units:

Density per Acre:

108 units/acre

Number of Stories:

7

Zoning District:

RC-3 Residential Commercial Medium Density

Other Designations:

WRN, Van Ness Corridor Plan Area



Before Construction: September 2017



After Construction: April 2022

1433 Bush Street



This site provides another demonstration of a conversion from a commercial use to a higher density residential use. This site added 7 stories of housing while reserving one level of space for ground floor retail, maintaining continuity with the surrounding sites. This development project included on-site inclusionary units.

Neighborhood:

Nob Hill

Site Size:

0.16 Acres

Prior Use:

Office

Demolition Permit Request Year:

2016

New Residential Construction Completed Year:

2019

Number of Units:

(34 market rate, 6 inclusionary)

Density per Acre:

256 units/acre

Number of Stories:

Zoning District:

RC-4 Residential Commercial High Density

Other Designations:

Transition Area, Van Ness Corridor Area Plan



Before Construction: June 2014



After Construction: April 2022

1255 Columbus Avenue - Residences on Columbus



This site was one of a few developments in the Russian Hill neighborhood. The scale of the new development is similar in scale to that of the prior office use and exemplifies the ability to add housing on small sites without disrupting the neighborhood context. This development project paid an inclusionary housing fee.

Neighborhood:

Russian Hill

Site Size:

0.39 Acres

Prior Use:

Office

Demolition Permit Request Year:

2013

New Residential Construction Completed Year:

2019

Number of Units:

20

Density per Acre:

52 units/acre

Number of Stories:

Zoning District:

C-2 Community Business

Other Designations:

WRN, Northeast Waterfront Area Plan



Before Construction: May 2014



After Construction: April 2022

1532 Howard Street



This project is on one of the many sites that redeveloped in the Mission District in recent years. Compared to other development projects in the Mission, the number of units produced is on the lower side, but it is an example of the diverse range of size and housing types being produced on non-vacant sites. This development project paid an inclusionary housing fee.

Neighborhood:

Mission

Site Size:

0.05 Acres

Prior Use:

Food/Beverage

Demolition Permit Request Year:

2014

New Residential Construction Completed Year:

2019

Number of Units:

15

Density per Acre:

326 units/acre

Number of Stories:

5

Zoning District:

WMUG - Wsoma Mixed Use-General

Other Designations:

PEG, Western SoMa Planning Area



Before Construction: June 2014



After Construction: April 2022

1 Stanyan Blvd - One Stanyan



This is the smallest redeveloped site in recent years. By developing 13 units on just 0.01 acres, this development provided needed infill housing at an appropriate density for the surrounding environment. This development project paid an inclusionary housing fee.

Neighborhood:

Lone Mountain/USF

Site Size:

0.01 Acres

Prior Use:

Filling/Service Station

Demolition Permit Request Year:

2015

New Residential Construction Completed Year:

2018

Number of Units:

13

Density per Acre:

1,621 units/acre

Number of Stories:

Zoning District:

NCD - Geary Boulevard **Neighborhood Commercial District**

Other Designations:

WRN



Before Construction: May 2011



After Construction: April 2022

3701 Noriega Street - The Altum



This site is the only case study on the far west side of the city. The project created housing on a small site, following the pattern of low to medium density developments replacing previously auto-oriented uses. This development project included on-site inclusionary units.

Neighborhood:

Sunset/Parkside

Site Size:

0.22 Acres

Prior Use:

Filling/Service Station

Demolition Permit Request Year:

2018

New Residential Construction Completed Year:

2021

Number of Units:

(9 market rate, 3 inclusionary)

Density per Acre:

55 units/acre

Number of Stories:

Zoning District:

NC-1 Neighborhood Commercial Cluster

Other Designations:

Transition Area, Sunset Chinese Cultural District



Before Construction: November 2017



After Construction: March 2022

4334 Geary Boulevard



Although there were not many redeveloped sites in this neighborhood in recent years, this site demonstrates the potential for adding housing in areas of San Francisco that are not undergoing substantial change. This site followed a similar pattern to other developments along Geary Boulevard, indicating ongoing potential for adding housing along transit rich corridors.

Neighborhood:

Inner Richmond

Site Size:

0.08 Acres

Prior Use:

Retail Sales

Demolition Permit Request Year:

2014

New Residential Construction Completed Year:

2019

Number of Units:

6

Density per Acre:

77 units/acre

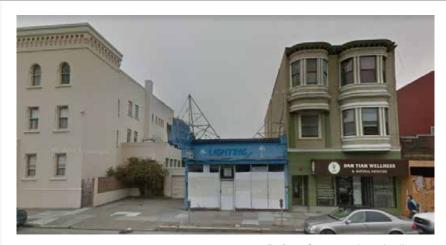
Number of Stories:

Zoning District:

NCD - Geary Boulevard Neighborhood Commercial District

Other Designations:

WRN



Before Construction: April 2011



After Construction: April 2022

Market Rate Developments with Less Than 10 Units

CASE STUDY

4171 24th Street



This site is notable because it is one of the largest single-family conversions in recent years.

Neighborhood:

Noe Valley

Site Size:

0.07 Acres

Prior Use:

1 family dwelling

Demolition Permit Request Year:

2014

New Residential Construction Completed Year:

2018

Number of Units:

Density per Acre:

76 units/acre

Number of Stories:

Zoning District:

NCD - 24th St Noe Valley **Neighborhood Commercial** District

Other Designations:

WRN, Mayor's Invest in **Neighborhoods Initiative Area**



Before Construction: December 2011



After Construction: February 2022

Market Rate Developments with Less Than 10 Units

CASE STUDY

363 21st Avenue



This site is one of the furthest west developments in recent years. It serves as an example of a typical conversion from a single-family property to a small multifamily property.

Neighborhood:

Outer Richmond

Site Size:

0.07 Acres

Prior Use:

1 family dwelling

Demolition Permit Request Year:

2013

New Residential Construction Completed Year:

2020

Number of Units:

Density per Acre:

44 units/acre

Number of Stories:

Zoning District:

RM-1 Residential Mixed Low Density

Other Designations:

PEG

Before Construction: Picture Unavailable



After Construction: December 2020

37 Blake St

This site converted from a single-family dwelling to a duplex, adding one net new unit.

Neighborhood:

Presidio Heights

Site Size:

0.07 Acres

Prior Use:

1 family dwelling

Demolition Permit Request Year:

2014

New Residential Construction Completed Year:

2018

Number of Units:

Density per Acre:

29 units/acre

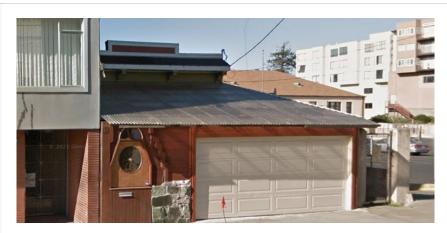
Number of Stories:

Zoning District:

RH-2 Residential House, Two **Family**

Other Designations:

WRN



Before Construction: January 2015



After Construction: January 2022

1241 Shrader Street



This site is a single-family to single-family conversion. Although it did not result in a net increase in units, it did provide a more suitable home on an otherwise distressed site.

Neighborhood:

Haight Ashbury

Site Size:

0.07 Acres

Prior Use:

1 family dwelling

Demolition Permit Request Year:

2015

New Residential Construction Completed Year:

2018

Number of Units:

Density per Acre:

15 units/acre

Number of Stories:

Zoning District:

RH-2 Residential House Two Family

Other Designations:

WRN



Before Construction: February 2015



After Construction: March 2022

1950 Mission Street - La Fenix



This site was one of the largest 100% affordable housing projects that was built on a redeveloped site in recent years. It is the only case study in this analysis where housing has replaced a school. This is one of multiple 100% affordable projects built on non-vacant sites in the city-designated American Indian Cultural District.

Neighborhood:

Mission

Site Size:

0.84 Acres

Prior Use:

School

Demolition Permit Request Year:

2018

New Residential Construction Completed Year:

2020

Number of Units:

162

Density per Acre:

194 units/acre

Number of Stories:

5

Zoning District:

NCT – Mission Street Neighborhood Commercial Transit

Other Designations:

PEG, American Indian Cultural District



Before Construction: September 2016



After Construction: April 2022

833 Bryant Street



This development provided 100% affordable housing in a special zoning district intended to preserve the artistic, industrial heritage of the neighborhood and in which the only residential use allowed is 100% affordable housing. This is also one of the best examples outside of the Mission neighborhood of a development on a non-vacant site to affordable housing. This site is also in the SoMa Pilipinas Filipino Cultural District.

Neighborhood:

South of Market

Site Size:

0.36 Acres

Prior Use:

Office

Demolition Permit Request Year:

2019

New Residential Construction Completed Year:

2021

Number of Units:

146

Density per Acre:

408 units/acre

Number of Stories:

6

Zoning District:

SALI - Service Arts Light Industrial

Other Designations:

PEG, SoMa Pilipinas Filipino Cultural District



Before Construction: April 2017



After Construction: April 2022

1990 Folsom Street - Casa Adelante



This development produced a substantial number of affordable units in a mixed-use neighborhood, and the new use is better aligned with the Area Plan and the City's designation as a PEG than the prior use.

Neighborhood:

Mission

Site Size:

0.67 Acres

Prior Use:

Warehouse

Demolition Permit Request Year:

2018

New Residential Construction Completed Year:

2021

Number of Units:

143

Density per Acre:

215 units/acre

Number of Stories:

8

Zoning District:

UMU - Urban Mixed Use

Other Designations:

PEG, American Indian Cultural District, Mission Area Plan



Before Construction: December 2013



After Construction: April 2022

490 South Van Ness Avenue



This development is an example of the city's effort to add 100% affordable housing to the Mission neighborhood. Like many of the other developments into affordable housing, this site added a substantial number of units on a small site that was previously an auto-oriented use.

Neighborhood:

Mission

Site Size:

0.33 Acres

Prior Use:

Filling/Service Station

Demolition Permit Request Year:

2015

New Residential Construction Completed Year:

2021

Number of Units:

81

Density per Acre:

246 units/acre

Number of Stories:

7

Zoning District:

UMU - Urban Mixed Use

Other Designations:

PEG, American Indian Cultural District, Mission Area Plan



Before Construction: April 2011



After Construction: July 2022

3001 24th Street - Casa De La Mission



This site is representative of a 100% affordable mid-scale development on a small site. Although the project is within the same neighborhood as multiple other non-vacant reuse sites redeveloped into 100% affordable housing, this is the only project within the boundaries of the Calle 24 Latino Cultural District.

Neighborhood:

Mission

Site Size:

0.15 Acres

Prior Use:

Recreation Building

Demolition Permit Request Year:

2018

New Residential Construction Completed Year:

2021

Number of Units:

45

Density per Acre:

300 units/acre

Number of Stories:

5

Zoning District:

NCT – 24th Mission Neighborhood Commercial Transit

Other Designations:

PEG, Calle 24 Latino Cultural District, Mayor's Invest in Neighborhoods Initiative Area



Before Construction: April 2016



After Construction: April 2022