



# San Francisco PIPELINE REPORT

San Francisco Planning Department  
September 2008





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# **San Francisco** **PIPELINE REPORT**

## **Quarter 2 2008**

San Francisco Planning Department  
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## What is the Pipeline?

The San Francisco consolidated pipeline consists of development projects that would add residential units or commercial space, applications for which have been formally submitted to the Planning Department or the Department of Building Inspection (DBI). Pipeline projects are at various stages of development: from applications having been filed to entitlements secured; from building permits approved and issued to projects under construction. The pipeline includes only those projects with a land use or building permit application. It does not include projects undergoing preliminary Planning Department project review or projections based on area plan analysis.

To filter inactive projects, the current pipeline only includes projects filed during the last five years, projects approved in the last four years, and projects for which construction has begun during the past three years. In addition, when a project is issued a Certificate of Final Completion by the DBI, it is taken out of the pipeline.

Data sources for the pipeline are chiefly the project databases maintained by the Planning Department and the Department of Building Inspection, respectively, but data is also occasionally obtained from the San Francisco Redevelopment Agency. Affordable housing projects sponsored by the Redevelopment Agency and the Mayor's Office of Housing figure in the pipeline database only after an application has been filed with either the Planning Department or the Department of Building Inspection. Projects in the pre-development stages, as well as projects currently under the review of the Redevelopment Commission, are not included in the Pipeline Report, unless a building permit application has been filed.<sup>1</sup>

The Pipeline Report measures housing production in terms of housing units. Non-residential development, on the other hand, is measured in terms of building square footage. Depending on the proposed development project, square footage can be added with new construction or expansion, reduced with demolition or

alteration, or re-allocated with conversion to other uses. Note that this report counts *net change*, or new space or units minus existing space lost through conversion or demolition.

## Time Frame and Certainty of Development

As the pipeline spans the entire project development life cycle for small and large projects ranging from addition of an extra unit in the rear yard to multi-structure complexes of residential and commercial development needing environmental impact reports and transportation studies, it follows that the entitlement and ultimate actualization of some projects is several years and occasionally decades into the future, while some projects are abandoned prior to receiving a permit. The pipeline, then represents a particular scenario that assumes that all development permits is eventually entitled, and all entitled development is eventually built. In reality, this is not the case.

## The Relevance of the Pipeline

The pipeline serves as a barometer of development trends. It illustrates the location and scale of current and proposed future construction and reveals where new land uses are being established; it also records demolition and a partial listing of conversion of existing land uses. In sum, the pipeline provides a short- to medium-term picture of changing land uses, tracking especially the changes to the city's housing stock and commercial uses.

## Accuracy and Timeliness

The pipeline is compiled and consolidated from different data sources and is subject to errors due to varying accuracy and currency of original sources. The data in this report is pulled from original sources current through June 30, 2008. While we make an effort to consolidate multiple permits for different components of the same project from different agencies, it is not possible to validate the accuracy of all projects. Should you find inaccuracies and omissions, please e-mail your comments to [aksel.olsen@sfgov.org](mailto:aksel.olsen@sfgov.org).

<sup>1</sup> For a list of affordable housing projects, please see Appendix A, List 6 in the 2007 Housing Inventory, available at [http://www.sfgov.org/site/uploadedfiles/planning/Citywide/pdf/Housing\\_Inventory\\_2007.pdf](http://www.sfgov.org/site/uploadedfiles/planning/Citywide/pdf/Housing_Inventory_2007.pdf).

## Q2 2008 Pipeline at a Glance

- There are currently around 1,050 projects in the pipeline of varying sizes and complexities.
- These projects, if completed, would add some 51,500 net new housing units to the city's housing stock. This figure has grown dramatically the past three quarters due to large development program applications, including Bayview Waterfront Project, Treasure Island, and a Park Merced expansion project. Since q1, however, the figure has dropped due to an earlier overcount error for Treasure Island.
- The Bayview Waterfront project, consisting of a number of sites along the southeastern waterfront, would account for 11,400 units and nearly 8 million sq. ft. of office, R&D, retail and community space, as well as a 10,000 seat arena at Candlestick Point.
- The pipeline would also add a net of 15.7 million commercial square footage. Within this total, office and retail space would see net gains of 10 million and 3.7 million sq. ft., respectively. There is a projected net loss of 500,000 sq. ft. of light industrial or Production, Distribution and Repair (PDR) space because of conversion to commercial and residential space.
- Nearly one in five projects (with approximately 7,500 units) are in the construction phase, while just over 2,400 have received building permits approvals or land use entitlements
- Well over half of all projects (with 34,500 units, or two thirds of all pipeline units, and 14 million commercial square feet) are still at the early stages of development, with permit applications filed with the Planning Department or the Department of Building Inspection.
- About 14,500 new units are proposed to be built in the Bayview/Hunters Point area, 7,800 on Treasure Island, and 6,000 in the 19th Avenue/Lake Merced area. Some 4,400 and 2,400 new units are under construction or are proposed to be built in Rincon Hill and the C-3 financial district respectively.

## The Pipeline

There are currently around 1,050 projects in the pipeline. Around 35 of these are projects sponsored through the San Francisco Redevelopment Agency. The Planning Department makes an effort to track these projects to make the pipeline more inclusive.

Of these projects, over two-thirds (about 71 percent) are exclusively residential and over one in five are mixed-use projects with both residential and commercial components. Only a small percentage of the pipeline projects or about 10 percent are commercial developments without a residential component.

A net total of 51,500 new housing units would be added to the city's housing stock according to the current pipeline. This is up more than 80 percent from the first quarter of 2007, largely due to the filing of applications for new large scale, long term development programs for Park Merced, Treasure Island, and the Bayview Waterfront. Excluding these major projects, there would be 28,400 net new units, and 6.9 million net new commercial square feet in the pipeline. Pipeline projects also comprise a net addition of 15.7 million sq. ft. of commercial development, up 264 percent since Q1 2007.

## Project Status

Table 1 on the following page shows the following:

- Some 22 percent of all projects, representing 7,500 net added housing units and 30,000 sq. ft. of commercial space, are under construction.
- About 15 percent of the projects (with 1,900 net units) have received building permit approvals and may have already begun construction.
- These projects (with a total of 9,400 net new units) are expected to be online in the next six to 36 months.
- About 40 percent of all projects (including 4,900 net new units and an addition of 1.1 million sq. ft. of commercial space) have filed building permit applications with the Department of Building Inspection. A number of these projects

**TABLE 1: Residential and Commercial Pipeline, by Pipeline Status and Land Use Category**

Pipeline Status / Stage in the Development Process	Total No. of Projects	Net Housing Units	Net Comm'l Sq. Ft.	Net Commercial Gross Square Footage					
				CIE	Medical	Office	PDR	Retail	Visitor
<b>Filed with Planning</b>	155	32,370	12,871,000	728,000	-45,000	7,837,000	410,000	2,543,000	1,398,000
<b>Approved by Planning</b>	83	4,780	1,413,000	141,000	50,000	1,102,000	-356,000	534,000	-51,000
<b>BP Filed</b>	431	4,920	1,070,000	72,000	27,000	1,231,000	-413,000	164,000	-16,000
<b>BP Approved/Issued/ Re-Instated</b>	150	1,920	214,000	82,000	0	-163,000	-63,000	284,000	73,000
<b>Construction</b>	235	7,480	32,000	4,000	0	53,000	-105,000	137,000	-3,000
<b>Grand Total</b>	1,054	51,470	15,599,000	1,028,000	32,000	10,060,000	-526,000	3,661,000	1,401,000

Notes:

/1/ Housing units in all tables rounded to nearest 10 units unless noted.

/2/ Commercial square feet in all tables rounded to nearest 1,000 square feet.

have already received Planning Department entitlements.

- Eight percent of the pipeline projects and nine percent of the units have received Planning Department approvals. If and when constructed, these projects would add 4,800 new units to the city's housing stock and over one million sq. ft. of commercial space. These projects now must secure a building permit.
- Nearly 160 projects in the pipeline (15 percent) are under Planning Department review. Collectively, these projects represent some 33,300 net new units and 13 million sq. ft. of non-residential uses. Thus, 80 percent of non-residential space and two thirds of the units in the pipeline are in this early stage.

## Amount and Type of Net New Commercial Space

Projects in the current pipeline also represent a net addition of 15.7 million sq. ft. of commercial development that would result in the following land use inventory changes:

- 10 million sq. ft. of additional office space
- 3.7 million sq. ft. of additional retail space
- 1.4 million sq. ft. of additional visitor-serving space (includes hotels)

- 1 million sq. ft. of additional cultural, institutional, educational (CIE) and medical space
- A net loss of 500,000 sq. ft. of production, distribution, and repair space, a large portion of which would go to housing use.<sup>2</sup>

The net addition of 10 million sq. ft. of office space represents nearly two thirds of the total net change in proposed commercial development. Retail and visitor-related square footage follow with about 23 percent and 9 percent, respectively.

## Location of New Development

Table 2 below shows that most of the proposed new residential construction in the pipeline are in Bayview/Hunter's Point, Treasure Island and Lake Merced). (See Map 1 for area boundaries used.) These areas would account for around 25,800 net units or more than half of all net additional units in the pipeline.

Other areas with active residential development include Rincon Hill, Market & Octavia and Downtown C-3, with a total of around 10,000 net new units.

Small scale, in-fill projects make up the bulk of pipeline projects, but account for a minority of units: The bottom half of all pipeline projects would add just 2,100 net new units, or four percent of the total number of pipeline units.

<sup>2</sup> PDR space here refers only to building square footage or built space. It does not include undeveloped or "vacant" land area containing PDR uses such as construction yards or ground storage.

TABLE 2: Residential and Commercial Pipeline, by Neighborhood

Neighborhood	Projects	Percent	Net Units	Percent	Net Comm'l Sq. Ft.	Percent	Residential Rank	Commercial Rank
19th Street Corridor	2	0.2%	320	0.6%	-17,000	-0.1%	19	34
Balboa	5	0.5%	10	0.0%	0	0.0%	39	26
Bayview	61	5.8%	14,310	27.8%	8,084,000	51.8%	1	1
Bernal Heights	60	5.7%	160	0.3%	-1,000	-0.0%	23	30
C-3	44	4.2%	2,590	5.0%	2,431,000	15.6%	6	2
Central Waterfront	15	1.4%	1,070	2.1%	-56,000	-0.4%	12	37
East SoMa	47	4.5%	2,290	4.4%	-260,000	-1.7%	7	39
Excelsior	23	2.2%	80	0.2%	25,000	0.2%	28	19
Geary Corridor	79	7.5%	620	1.2%	132,000	0.8%	14	11
Glen Park	8	0.8%	10	0.0%	0	0.0%	38	26
Haight Ashbury/Cole Valle	12	1.1%	70	0.1%	18,000	0.1%	31	21
Inner Sunset	21	2.0%	70	0.1%	-3,000	-0.0%	32	32
Japantown	10	0.9%	270	0.5%	-4,000	-0.0%	20	33
Judah Corridor	22	2.1%	50	0.1%	14,000	0.1%	33	23
Lake Merced	5	0.5%	5,680	11.0%	517,000	3.3%	3	7
Marina	42	4.0%	360	0.7%	20,000	0.1%	18	20
Market & Octavia	38	3.6%	3,190	6.2%	541,000	3.5%	5	6
Mid-Market	14	1.3%	1,990	3.9%	472,000	3.0%	8	8
Mission	90	8.5%	800	1.6%	422,000	2.7%	13	9
Mission Bay	8	0.8%	570	1.1%	849,000	5.4%	16	4
Noe Valley	37	3.5%	40	0.1%	0	0.0%	34	26
Northeast	80	7.6%	1,990	3.9%	76,000	0.5%	9	14
Ocean View	30	2.8%	90	0.2%	-20,000	-0.1%	26	36
Outer Mission	31	2.9%	210	0.4%	-17,000	-0.1%	21	35
Outer Sunset	15	1.4%	80	0.2%	42,000	0.3%	29	15
Port	6	0.6%	510	1.0%	1,140,000	7.3%	17	3
Presidio	16	1.5%	30	0.1%	29,000	0.2%	36	18
Richmond	24	2.3%	30	0.1%	4,000	0.0%	37	25
Rincon Hill	15	1.4%	4,350	8.4%	116,000	0.7%	4	12
Showplace & Potrero Hill	40	3.8%	1,310	2.5%	-83,000	-0.5%	10	38
Taraval Corridor	13	1.2%	40	0.1%	-3,000	-0.0%	35	31
Transbay	4	0.4%	580	1.1%	687,000	4.4%	15	5
Treasure Island	1	0.1%	6,000	11.6%	250,000	1.6%	2	10
Twin Peaks	20	1.9%	200	0.4%	39,000	0.3%	22	16
Upper Market	45	4.3%	90	0.2%	17,000	0.1%	27	22
Van Ness Corridor	1	0.1%	100	0.2%	0	0.0%	24	26
Visitation Valley	30	2.8%	70	0.1%	37,000	0.2%	30	17
West SoMa	27	2.6%	1,190	2.3%	92,000	0.6%	11	13
Western Addition	13	1.2%	100	0.2%	7,000	0.0%	25	24
Grand Total	1,054	100.0%	51,470	99.9%	15,599,000	100.0%		

Nearly seven out of eight commercial square feet would be added in the Bayview, Downtown districts (C-3), port lands, Mission Bay, and Transbay areas. Of these, the bulk of this space would take place in Bayview and Downtown C-3 districts.

### Projects by Year of First Filing

The year of the initial filing of either the application for planning entitlements or the building permit application provides a measure of how long projects spend in the entitlement system.

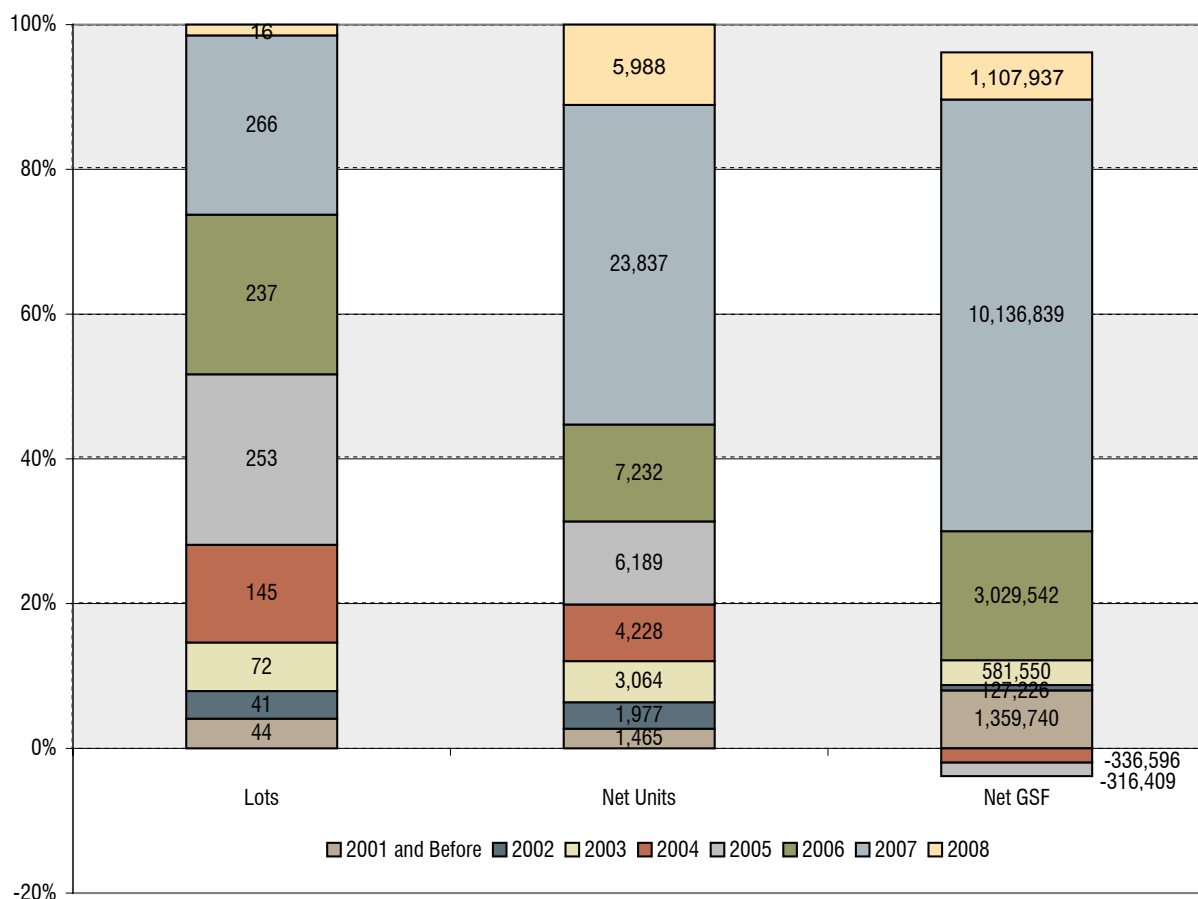
Figure 1 below shows the number of units and commercial square footage by the year the application was first filed with the Planning Department or the Department of Building Inspection. While there are some projects with a very long history in the pipeline, the bulk of projects for both residential and commercial development

came into the pipeline in the past two years. A few large projects filed during 2007 and early 2008 means that while the *number* of projects is fairly evenly distributed over the past few years, in terms of the number of *units* and *commercial square feet* there is a considerable concentration in 2007.

Filings for residential construction continued apace and of the units in the pipeline; more than two thirds of units (and half the projects) in the pipeline have permit applications filed in 2006 or later. Three quarters of commercial square feet in the pipeline was filed in 2007.

Figure 1 also shows that only a few of commercial projects that are still in the pipeline were filed in the years between 2001 and 2005; most of the projects filed in those years have already been completed or withdrawn and are thus no longer in the pipeline. The overall number of projects filed will be discussed in a later section.

**FIGURE 1: Projects in Current Pipeline, by Year Filed**



**TABLE 3: Residential and Commercial Pipeline by Generalized Zoning Category**

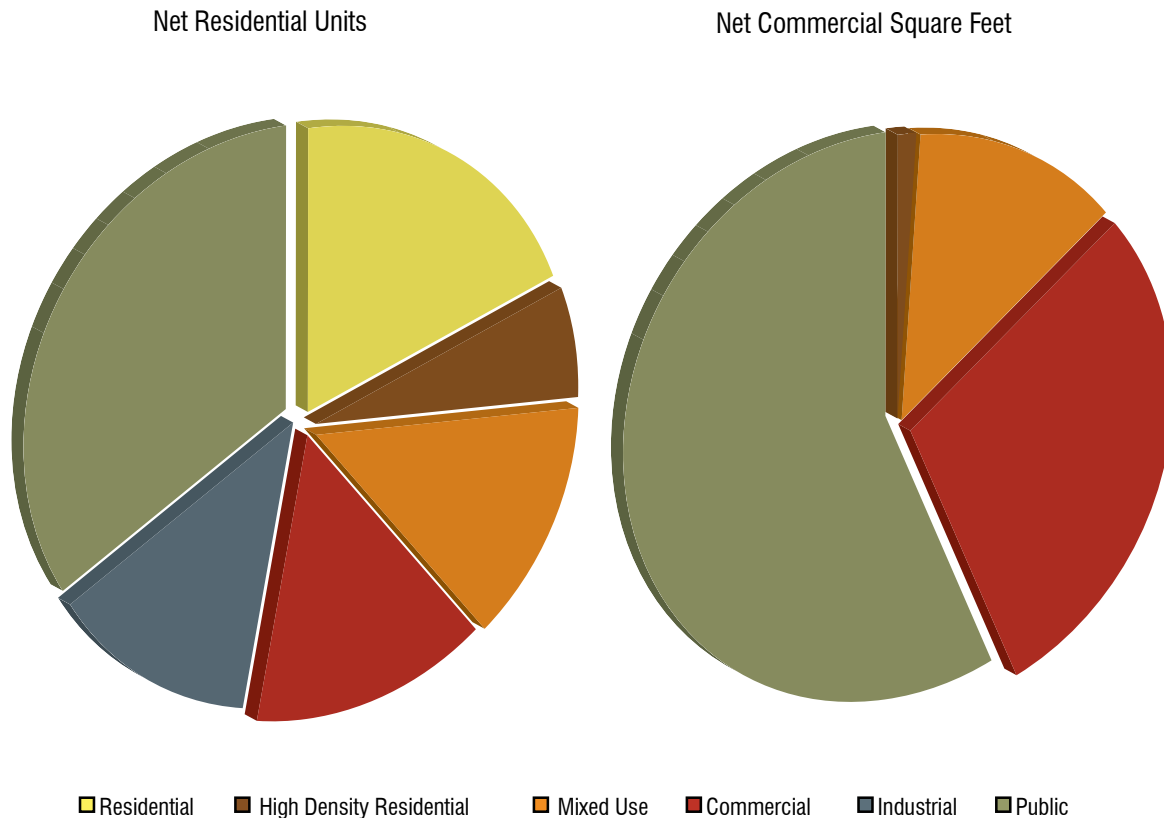
Generalized Zoning	Area, Pct	Projects	Net Units	Net Comm'l Sq. Ft.	CIENET	MEDNET	MIPSNET	PDRNET	RETNET	VISITNET
<b>Residential</b>	46.3%	612	9,900	5,000	218,000	19,000	-320,000	-319,000	498,000	-87,000
<b>High Densi</b>	0.2%	10	3,280	-170,000	0	0	-111,000	-71,000	12,000	0
<b>Mixed Use</b>	6.5%	240	6,870	2,038,000	250,000	-7,000	1,832,000	-183,000	214,000	-20,000
<b>Commercial</b>	2.8%	67	7,260	4,653,000	27,000	0	2,930,000	-69,000	863,000	900,000
<b>Industrial</b>	11.6%	120	6,690	21,000	137,000	20,000	27,000	-699,000	544,000	-2,000
<b>Public</b>	32.7%	5	17,470	9,053,000	396,000	0	5,702,000	815,000	1,530,000	610,000
<b>Grand Total</b>	100.0%	1,054	51,470	15,599,000	1,028,000	32,000	10,060,000	-526,000	3,661,000	1,401,000

### Pipeline Projects by Current Zoning Category

Table 3 shows the pipeline by general zoning categories. Figure 2 illustrates the distribution of the residential pipeline by zoning category.

#### Residential Pipeline

Areas zoned Public account for the bulk of planned residential development in the long term, with a handful of projects, but a potential of 17,400

**FIGURE 2: Distribution of Units by Zoning Category**

added units. These are the Treasure Island and Bayview Waterfront projects, still in early stages of planning, with time horizons well over a decade. These projects could also add 9 million square feet of commercial space.<sup>3</sup>

About one in seven units in the current pipeline is proposed in industrially zoned areas of the city (M-1, M-2, C-M and SLI). These projects, proposing 6,700 net new units, are in some cases conversions of existing industrial buildings, in others new

<sup>3</sup> Technically, the Bayview Waterfront project spans multiple zoning districts, but has been accounted for here exclusively in the "Public" category, somewhat skewing the distribution.



development. The added residential units in industrial areas are accompanied by loss of PDR space and addition of retail space (see Table 3).

One in six of all proposed residential units are in commercial districts (C-2, C-3). These districts comprise less than three percent of the total city area but will account for 7,300 units. These units are concentrated in 67 development projects (representing seven percent of all pipeline projects), suggesting the relatively large scale of each project.

While comprising only six percent of city area, 10 percent of new units are proposed in mixed-use districts. About 6,900 new units could go in these areas, mainly in neighborhood commercial districts.

Also of note, the high-density, transit-accessible downtown neighborhoods of Rincon Hill and Transbay account for less than one percent of the city's land area, but will nonetheless account for around six percent of all units in the pipeline in a handful of projects. These projects are thus large, averaging more than 300 net added units per project.

Conversely, residential projects in the Residential (R) districts tend to be small scaled, in-fill developments, accounting for some 57 percent of proposed projects but just 20 percent of the total units (or 9,900 net units) in the pipeline. Half of these units, in turn, would be the result of just one project, the expansion of Park Merced. Residential zoning districts form the largest group, comprising 46 percent of the city area.

## Commercial Pipeline

Commercial development is concentrated in two general zoning districts. As with the residential pipeline, a large portion (30 percent) of net non-residential development would take place in the commercial districts.

As some of the major projects are categorized as being located in areas zoned Public, development here would add some net 8.7 million square feet, or nearly 60 percent of all proposed commercial development. This chiefly reflects the large scale Bayview Waterfront Project, which would itself

add more than eight million commercial square feet as currently proposed.

The mixed use districts account for the third largest amount of proposed non-residential development, with 2.1 million square feet pending.

Other districts account for only a minor amount of non-residential development.

Breaking down commercial space into subcategories, the three largest types land-use classes of commercial development for the city as a whole are office space (10 million sq. ft.), retail (3.7 million sq. ft.), and visitor-related (1.4 million sq. ft.) uses.

High density residential and industrial districts will see some loss of commercial square footage as these are converted to residential development.

## Residential Pipeline by Project Size

Table 4 below shows the residential pipeline by neighborhood and the number of units in the project.<sup>4</sup>

The three most active areas for residential development include Bayview/Hunter's Point (where the Bayview Waterfront Project is located), Treasure Island and the 19th Avenue Area, location of Park Merced. Beyond a geographic concentration of future development in a handful of districts, individual projects are large as well. Almost all proposed units in Rincon Hill, Bayview, Treasure Island and 19th Avenue Area are in projects with 250 units or more. In Mid-Market, Market & Octavia, and Downtown C-3, the projects are still large, with projects in the range of 50-99 units being also common.

Except for Park Merced, in residentially zoned areas in western part of the city, development is limited in scope and consists chiefly of small-scale in-fill projects. Thus, of the total of 119 units in the pipeline in the Richmond, Noe Valley and Glen Park, all development is in structures of 9 units or less and 92 are single-unit projects.

<sup>4</sup> In most cases this measures the number of units in the building. However, a handful of projects include more than one building thus making this accounting problematic.

**TABLE 4: Project by Neighborhood and Building Size**

Neighborhood	Project Size							Grand Total	Rank
	Single Family	2-9	10-19	20-49	50-99	100-249	Above 250		
19th Street Corridor	0	0	0	0	0	322	0	322	19
Balboa	6	0	0	0	0	0	0	6	39
Bayview	29	29	30	24	50	664	14,025	14,851	1
Bernal Heights	47	47	10	69	0	0	0	173	23
C-3	1	10	14	132	973	952	600	2,682	6
Central Waterfront	2	2	12	116	289	262	391	1,074	12
East SoMa	4	31	63	344	616	462	810	2,330	8
Excelsior	20	15	0	0	56	0	0	91	28
Geary Corridor	65	66	68	105	83	300	0	687	14
Glen Park	12	0	0	0	0	0	0	12	38
Haight Ashbury/Cole Valle	5	16	0	0	56	0	0	77	31
Inner Sunset	22	18	0	34	0	0	0	74	32
Japantown	7	5	0	28	0	231	0	271	20
Judah Corridor	27	25	10	0	0	0	0	62	33
Lake Merced	0	0	0	0	0	0	8,898	8,898	2
Marina	18	19	63	87	231	0	0	418	18
Market & Octavia	8	27	40	242	252	1,422	1,210	3,201	5
Mid-Market	0	0	0	150	88	206	1,925	2,369	7
Mission	47	155	103	75	182	276	0	838	13
Mission Bay	0	0	0	0	64	241	268	573	16
Noe Valley	42	20	0	0	0	0	0	62	33
Northeast	31	139	92	292	640	865	0	2,059	9
Ocean View	29	12	30	31	0	0	0	102	26
Outer Mission	16	61	87	0	61	0	0	225	21
Outer Sunset	13	2	11	0	55	0	0	81	30
Port	0	0	0	0	0	192	319	511	17
Presidio	13	25	0	0	0	0	0	38	37
Richmond	38	7	0	0	0	0	0	45	35
Rincon Hill	0	5	0	0	221	389	3,734	4,349	4
Showplace & Potrero Hill	33	16	12	97	0	614	557	1,329	10
Taraval Corridor	7	23	10	0	0	0	0	40	36
Transbay	0	0	19	0	0	140	420	579	15
Treasure Island	0	0	0	0	0	0	6,000	6,000	3
Twin Peaks	12	3	13	0	0	175	0	203	22
Upper Market	45	32	0	44	0	0	0	121	24
Van Ness Corridor	0	0	0	0	0	100	0	100	27
Visitacion Valley	16	58	12	0	0	0	0	86	29
West SoMa	2	28	37	111	143	453	416	1,190	11
Western Addition	6	19	0	79	0	0	0	104	25
Grand Total	623	915	736	2,060	4,060	8,266	39,573	56,233	

Notes:

/1/ Housing unit counts are not rounded.

/2/ As the table categorizes by building size, numbers here represent total units as opposed to net units, for which reason the unit count is higher than in other summary tables.

**TABLE 5: Residential Project Size Distribution and Pipeline Status**

Status	Project Size							Grand Total
	Single Family	2-9	10-19	20-49	50-99	100-249	Above 250	
Planning Filed	31	101	261	633	1,621	3,569	29,770	35,986
PL Approved	11	59	87	236	768	791	3,116	5,068
BP Filed	315	460	294	860	747	855	1,707	5,238
BP Approved/ Issued/Re-Instated	96	92	40	195	295	712	579	2,009
Construction	170	203	54	136	629	2,339	4,401	7,932
Grand Total	623	915	736	2,060	4,060	8,266	39,573	56,233

Notes:

/1/ Housing unit counts are not rounded.

/2/ As the table categorizes by building size, numbers here represent total units as opposed to net units, for which reason the unit count is higher than in other summary tables.

Table 5 and Figure 3 below show the residential pipeline by building size and pipeline status. The residential pipeline shows that:

- Of the 2,000 units with building permits approved, 1,300 units, or two out of three, are in buildings of 100 units and above.
- Only two percent of the residential pipeline will be in buildings with nine units or less.

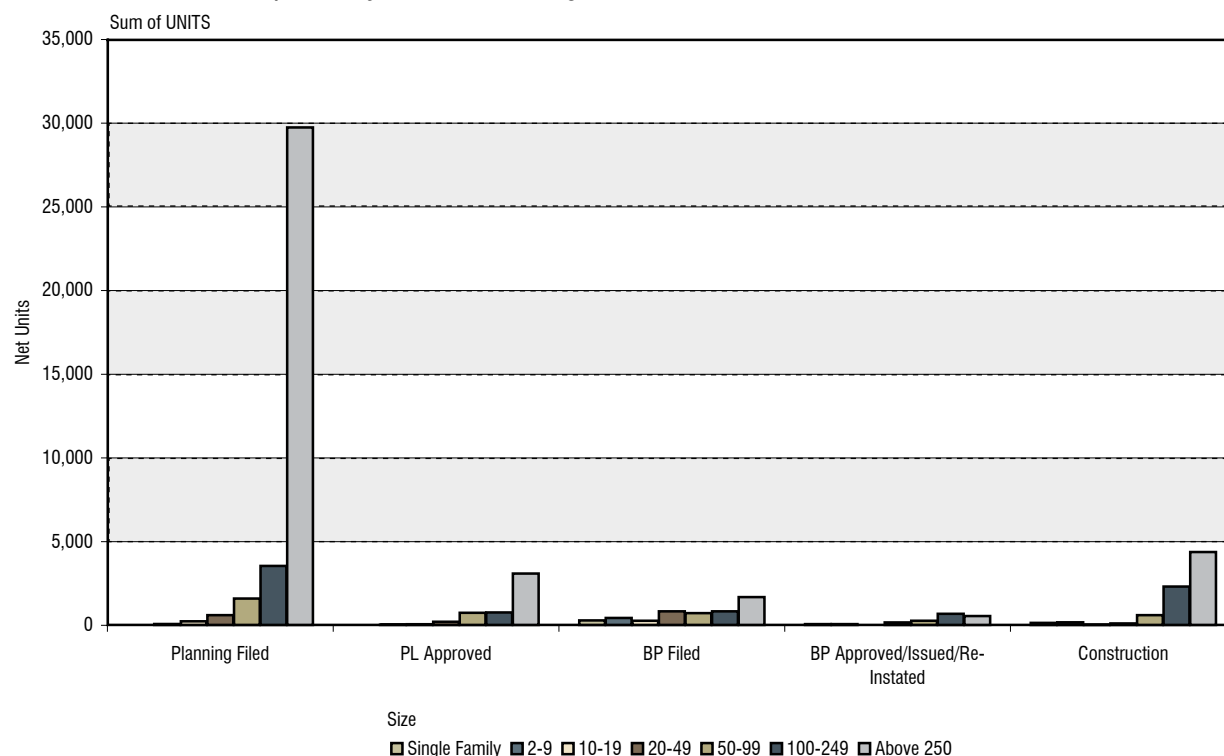
- Single family homes constitute one percent of the total units in the pipeline.

### Conversion of Commercial Space to Residential Use<sup>5</sup>

There are 73 projects in the current pipeline database proposing demolition or conversion of existing Production, distribution and Repair-

<sup>5</sup> Numbers represented here differ from those reported in Table 1. Table 1 represents the net change of all projects whereas numbers here are limited to projects representing conversions or demolitions resulting in a net loss of PDR space (Table 6) and office space (Table 7).

**FIGURE 3: Residential Pipeline, by Status & Building Size**



**TABLE 6: PDR Space Conversion to Residential Use, by Planning District**

Neighborhood	PDR Net	Percent	Projects	Percent	Net Units	Percent
Bayview	-230,000	16.3%	5	6.8%	600	10.3%
C-3	-25,000	1.8%	1	1.4%	150	2.6%
Central Waterfront	-244,000	17.3%	6	8.2%	710	12.2%
East SoMa	-209,000	14.8%	16	21.9%	1,240	21.3%
Geary Corridor	-8,000	0.6%	2	2.7%	10	0.2%
Marina	-9,000	0.6%	2	2.7%	40	0.7%
Market & Octavia	-185,000	13.1%	6	8.2%	550	9.4%
Mid-Market	-33,000	2.3%	2	2.7%	50	0.9%
Mission	-59,000	4.2%	9	12.3%	140	2.4%
Northeast	-83,000	5.9%	7	9.6%	360	6.2%
Ocean View	-4,000	0.3%	1	1.4%	30	0.5%
Outer Mission	-11,000	0.8%	2	2.7%	20	0.3%
Presidio	-1,000	0.1%	1	1.4%	10	0.2%
Rincon Hill	-72,000	5.1%	3	4.1%	720	12.3%
Showplace & Potrero Hill	-198,000	14.0%	4	5.5%	870	14.9%
West SoMa	-42,000	3.0%	5	6.8%	310	5.3%
Transbay	-2,000	0.1%	1	1.4%	20	0.3%
<b>Grand Total</b>	<b>-1,413,000</b>	<b>100.0%</b>	<b>73</b>	<b>100.0%</b>	<b>5,830</b>	<b>100.0%</b>

**TABLE 7: Office Space Conversion to Residential Use, by Planning District**

Neighborhood	Office Net	Percent	Projects	Percent	Net Units	Percent
Bayview	-1,000	0.1%	1	2.2%	0	0.0%
C-3	-955,000	56.1%	9	19.6%	620	16.0%
East SoMa	-140,000	8.2%	4	8.7%	150	3.9%
Inner Sunset	-2,000	0.1%	1	2.2%	10	0.3%
Marina	-11,000	0.6%	3	6.5%	80	2.1%
Market & Octavia	-22,000	1.3%	6	13.0%	630	16.2%
Mid-Market	-50,000	2.9%	1	2.2%	90	2.3%
Mission	-7,000	0.4%	2	4.3%	10	0.3%
Northeast	-169,000	9.9%	6	13.0%	230	5.9%
Ocean View	-14,000	0.8%	2	4.3%	50	1.3%
Rincon Hill	-137,000	8.1%	4	8.7%	1,420	36.6%
Showplace & Potrero Hill	-47,000	2.8%	2	4.3%	140	3.6%
Transbay	-110,000	6.5%	1	2.2%	420	10.8%
West SoMa	-25,000	1.5%	2	4.3%	20	0.5%
Visitacion Valley	-2,000	0.1%	1	2.2%	0	0.0%
Japantown	-8,000	0.5%	1	2.2%	30	0.8%
<b>Grand Total</b>	<b>-1,701,000</b>	<b>100.0%</b>	<b>46</b>	<b>100.0%</b>	<b>3,880</b>	<b>100.0%</b>

use buildings to residential or other use.<sup>6</sup> The corresponding figure for the conversion of office space is 46 projects. These projects represent approximately 11 percent (or 5,800 units) and eight percent (or 3,600 units), respectively, of the residential units in the pipeline.

Nearly all units replacing office uses are in mid- to high-rise residential structures of 20 to 500 housing units. These projects are mostly concentrated in the eastern half of the city: Rincon Hill, East SoMa, Showplace Square & Potrero Hill, Transbay, Mission, Downtown, and Western SoMa.

About 67 percent of the PDR conversion projects and about 60 percent of the office conversion projects are in the Planning or Building Permits Filed stage and are under review. Should approval be granted, these projects, depending on their size and complexity, on average might take between three to five years to be completed.

### Conversion of PDR Space

- If the pipeline is developed as proposed, some 1.4 million sq. ft. of PDR space will be lost to conversion or demolition.<sup>7</sup> It would be replaced with residential units (5,800) and/or other commercial uses.
- Most of the PDR loss will be in Central Waterfront, East SoMa, and Showplace Square & Potrero Hill, each accounting for a PDR space loss of around 200,000 sq. ft., and together nearly half of the overall loss. The loss of PDR space in these three neighborhoods would bring in 2,800 net new housing units.
- In addition to residential uses, the net loss of PDR space will be replaced chiefly by the following land uses: retail (244,000 sq. ft.), Cultural/Institutional/ Educational (149,000 sq. ft.), and Visitor-related (112,000 sq. ft.).

<sup>6</sup> This pipeline only accounts for PDR built space. Hence, the conversion of undeveloped or vacant lands currently in PDR uses, such as construction or open storage yards are not accounted for in this report.

<sup>7</sup> Table 6 shows only projects that include the conversion or loss of PDR space to residential use. Other, separate projects proposing to add PDR space not involving conversion or demolition of PDR space are not counted in this table. Table 1 shows a net loss of 700,000 sq. ft. as it is a tally of all projects that add, convert or demolish PDR space while this table only counts loss.

Table 6 above provides a measure of how many units are produced relative to the lost PDR space.

### Conversion of Office Space

- Approximately 1.7 million sq. ft. of office space are proposed to be converted to residential and/or other commercial use. This loss of office space is mainly taking place in the northeastern part of the city where most office space is located. Table 7 shows that the Downtown C-3 districts would lose the most office space – around 500,000 sq. ft., or a third of the total conversion loss.
- A total of 3,900 units are proposed to be built replacing the lost office space. In addition to housing, small amounts of retail, visitor-related and PDR spaces are being proposed in the converted offices.

These conversions of a number of individual office buildings notwithstanding, taken together with other commercial developments in the pipeline counted in Table 1, the overall result would still be a net addition of office space. As reported in Table 1, the net addition of office amounts to 9.7 million square feet citywide.

## Projects Under Planning Review

### Project Application Filings

Table 8 below shows that a total of 87 permit applications were filed in the second quarter of 2008. This count represents about 1,000 units and 800,000 sq. ft. of commercial development and, relative to the past quarter, is a return to more normal conditions in terms of the size of projects filed. Taken as a whole since 2000 (Figures 4 and 5), there has been a slight downward trend of the *number of projects* filed and approved, respectively, but in terms of *number of units* filed for, there is no indication of a downward trend, neither in the short or medium term. The recent economic slowdown has not been seen yet because projects, on average, remain fairly large. As their completion are many years in the future, these large projects may not

**Table 8:** Projects Filed With and Approved by the Planning Department

Quarter Filed	Filed				Approved			
	Projects	Net Units	Avg Units/Project	Net Sq. Ft	Projects	Net Units	Avg Units/Project	Net Sq. Ft
2007 Q1	80	1,460	18	147,000	37	620	17	29,000
2007 Q2	61	580	10	1,013,000	28	810	29	10,000
2007 Q3	92	9,740	106	341,000	34	290	9	325,000
2007 Q4	99	4,460	45	132,000	31	280	9	-5,000
2008 Q1	86	6,110	71	1,088,000	37	200	5	77,000
2008 Q2	87	1,020	12	770,000	65	330	5	291,000

**TABLE 9:** All Projects Under Planning Review, by Case Type

Suffix	Projects	Percent	Net Units	Percent	Net Comm'l Sq. Ft.	Percent
'Beauty Pageant'	12	2.3%	70	0.1%	1,808,000	12.4%
Conditional Use	181	34.2%	11,560	24.6%	1,075,000	7.4%
Discretionary Review	68	12.8%	380	0.8%	175,000	1.2%
Variance	76	14.3%	2,930	6.2%	-500,000	-3.4%
Exception to Downtown Controls	14	2.6%	2,140	4.6%	-161,000	-1.1%
Environmental/Historical Review	141	26.6%	29,010	61.7%	11,727,000	80.7%
Condominium Conversion	3	0.6%	120	0.3%	429,000	3.0%
Shadow Study	3	0.6%	10	0.0%	5,000	0.0%
Other Planning Review	32	6.0%	820	1.7%	-22,000	-0.2%
<b>Total</b>	<b>530</b>	<b>100.0%</b>	<b>47,010</b>	<b>100.0%</b>	<b>14,536,000</b>	<b>100.0%</b>

reflect short-term economic cycles in the real estate market.

Projects approved during any given quarter shows a time lag relative to the projects filed curve. A project is often approved in another quarter than the one in which it was filed, particularly for projects needing environmental review and/or conditional use.

Major projects filed during the second quarter of 2008 include:

- 472 Ellis St, Arlington Hotel, a conversion of hotel units/ group housing to 150 residential group housing units.
- 140 New Montgomery St, a conversion of office space and two-story addition adding 118 units.
- 1401 California St, demolition of Cala Foods and construction of 95-unit, 30,000 sf retail mixed use building, LEED gold.

- 2001 Market St, S&C Ford showroom replacement with 72 residential units and 30,000 sf of retail. LEED gold.
- 1455 Third St, new 10-story office/laboratory building with ground floor retail.

Also during the second quarter, a total of 45 projects with 262 net new units and 368,000 sq. ft of net new commercial space were completed.

### Projects Under Planning Review

Project applications under Planning Department review total 530, representing nearly 47,000 units and 15 million sq. ft. of commercial space (Table 9). Twelve projects are being reviewed subject to the Planning Code's §321 concerning the annual limit on office space ('Beauty Pageant'), 181 are awaiting conditional use hearings, while at least 140 projects are going through environmental review.<sup>8</sup> It is the environmental review cases

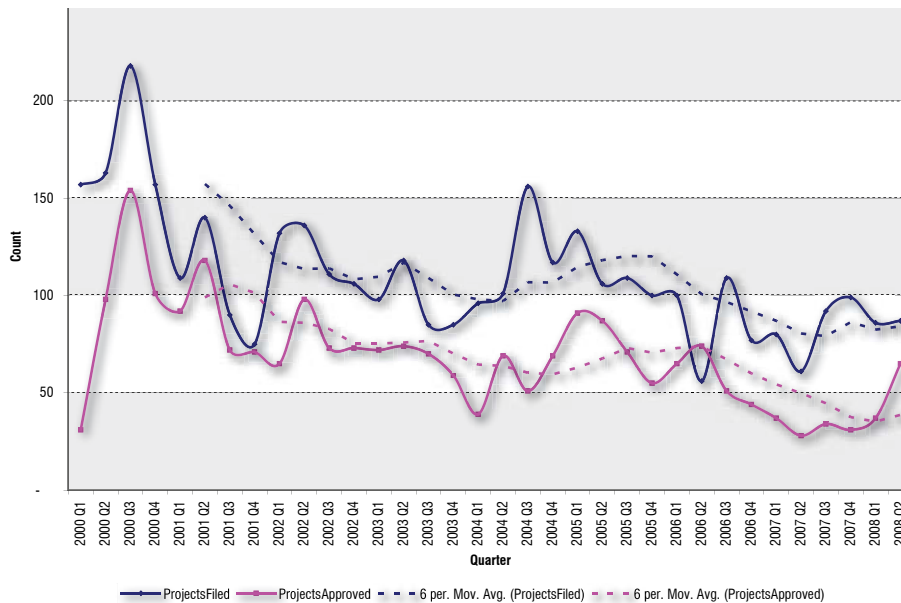
<sup>8</sup> A single project may require both environmental clearance, a variance, and a conditional use permit. For the reporting in this table, however,

that represent the most long range projects, and these cases also account for the largest amount of square footage and residential units. It is a matter of judgment whether these large-scale development programs should be included in the

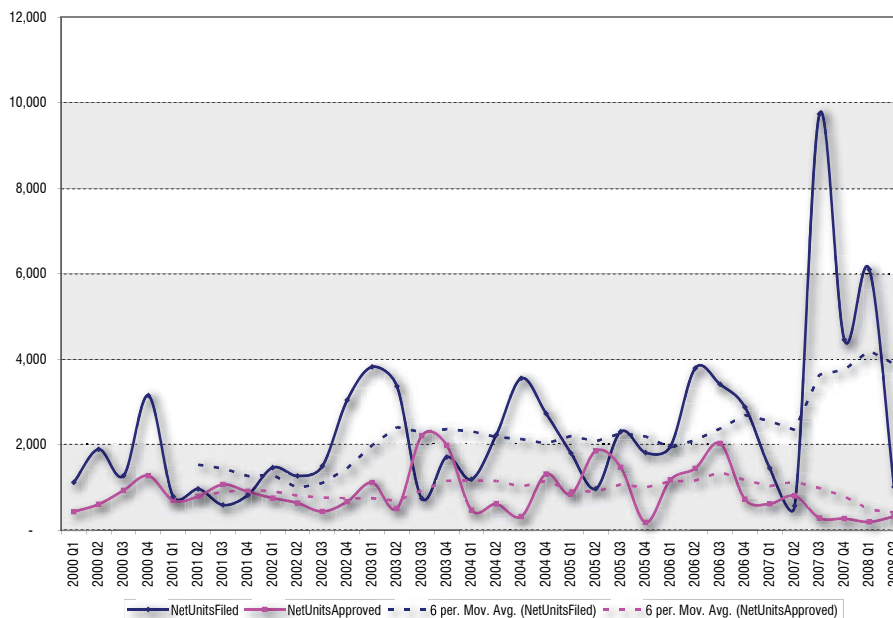
each case was assigned just one review type to avoid duplicate accounting. Categories are listed in order of precedence. If a project needs both a Conditional Use review and 'Beauty Pageant' review, it will be listed in this table under 'Beauty Pageant', the category highest up in the table. This table is therefore a simplification of the review process.

standard pipeline tally, or whether they should be accounted for separately. To the extent that they represent development programs as much as individual projects, it might make more sense to include them once a building permit would be sought down the line. That would entail that the pipeline would be more project oriented, and with a more short term focus. It was, in the end, decided to keep these plans in for now in the interest of being inclusive.

**Figure 4: Pipeline Project Applications Filed and Approved with the Planning Department, by Quarter**

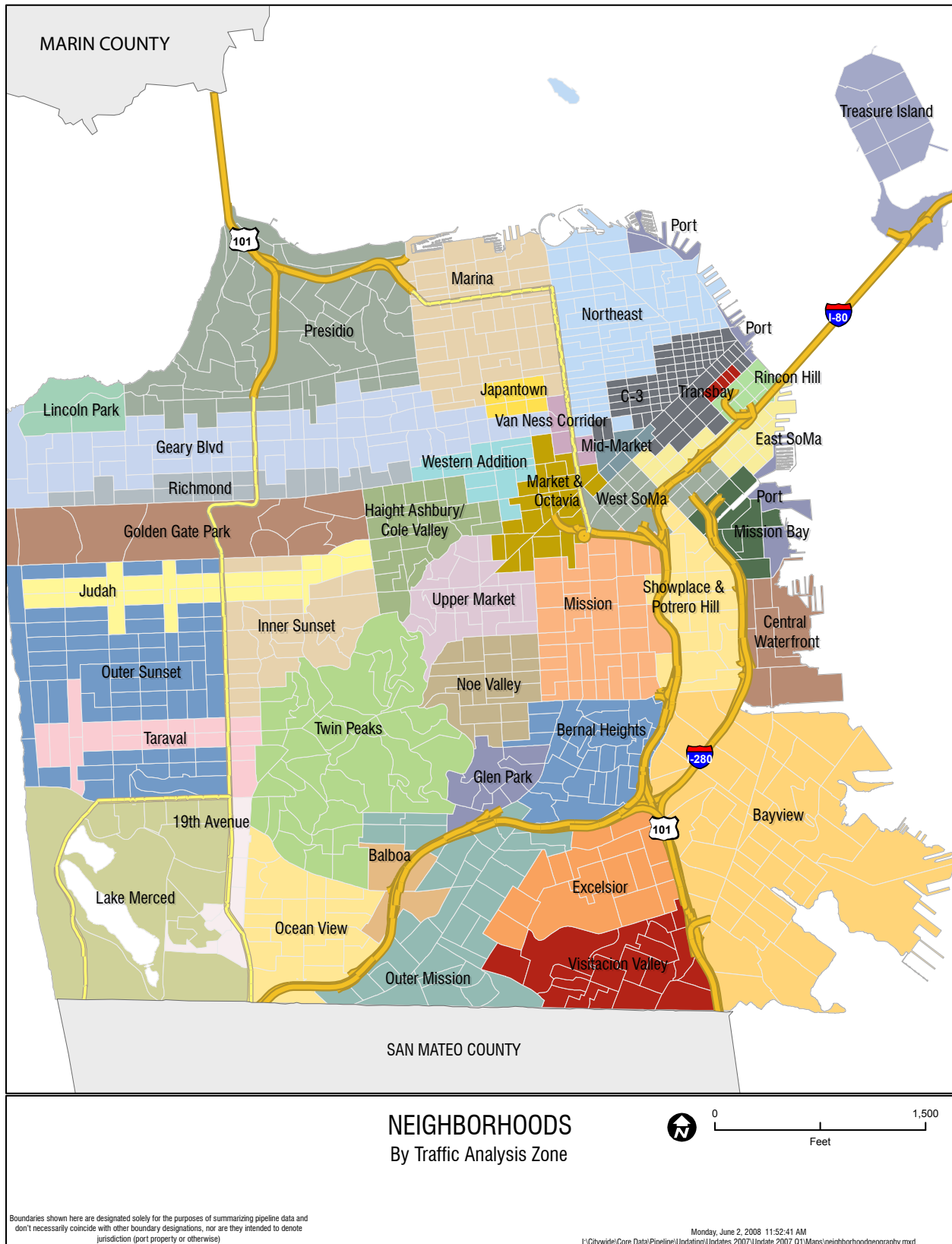


**Figure 5: Pipeline Units Filed and Approved by the Planning Department, by Quarter**



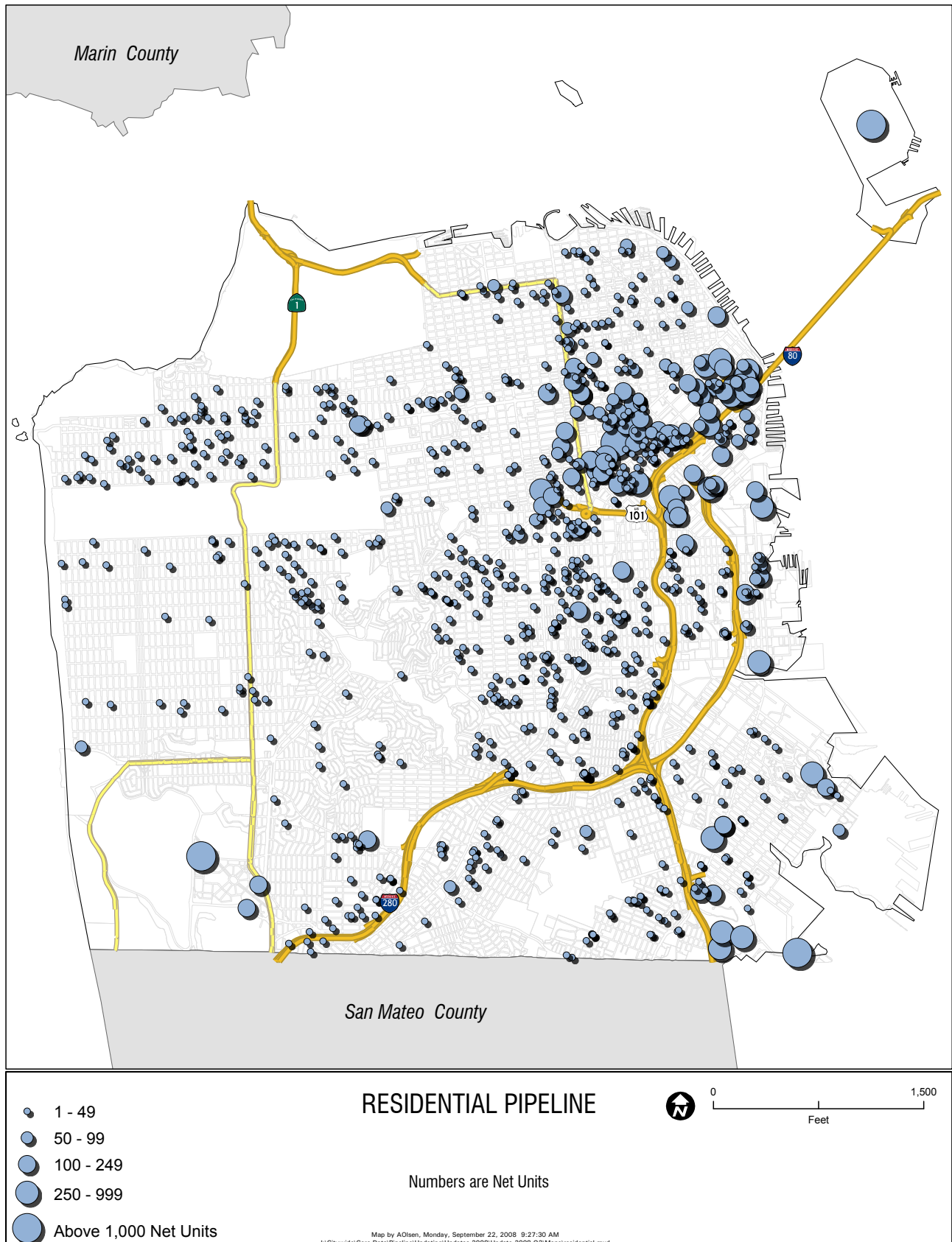


**MAP 1: Neighborhoods Highlighted in the Pipeline Report**

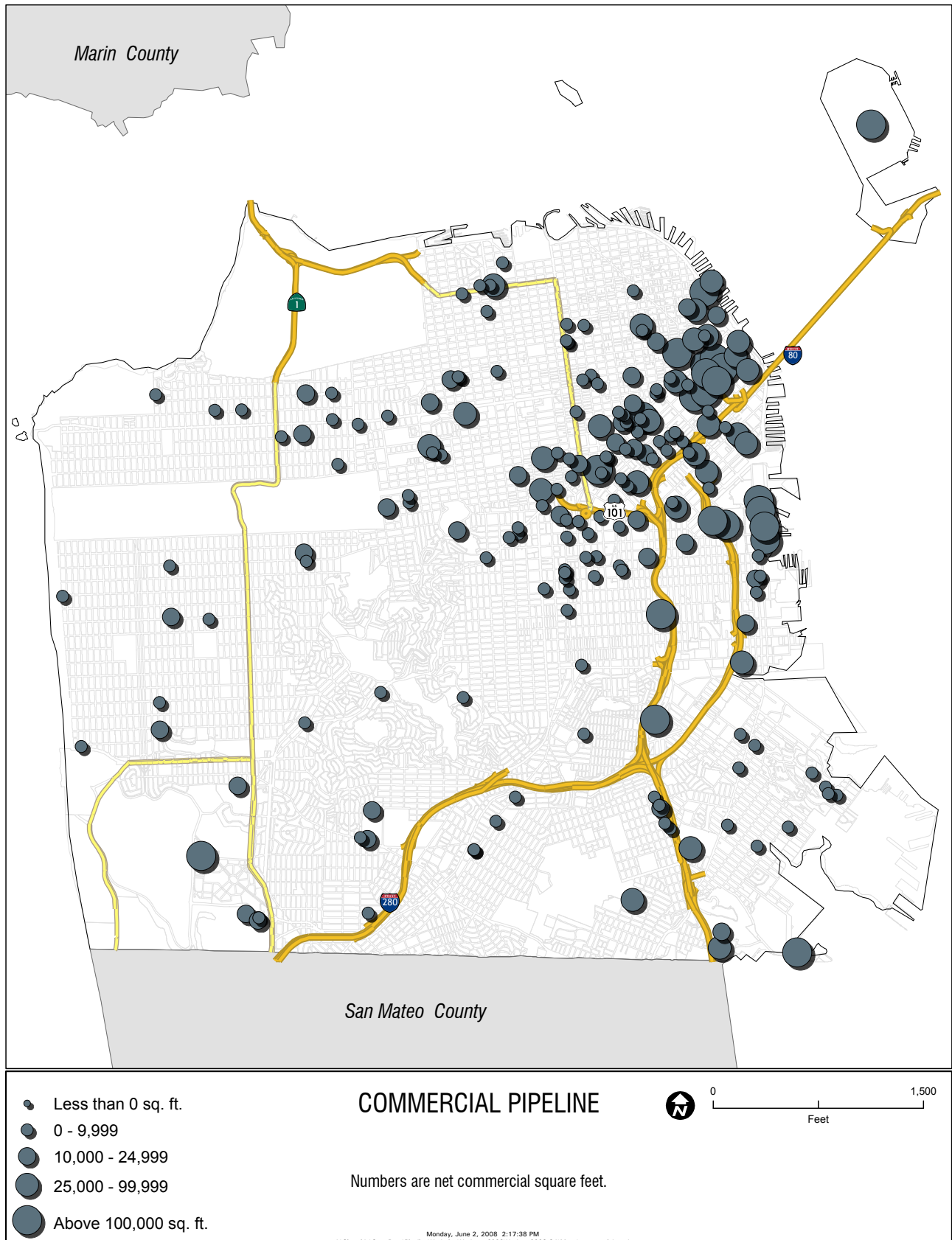




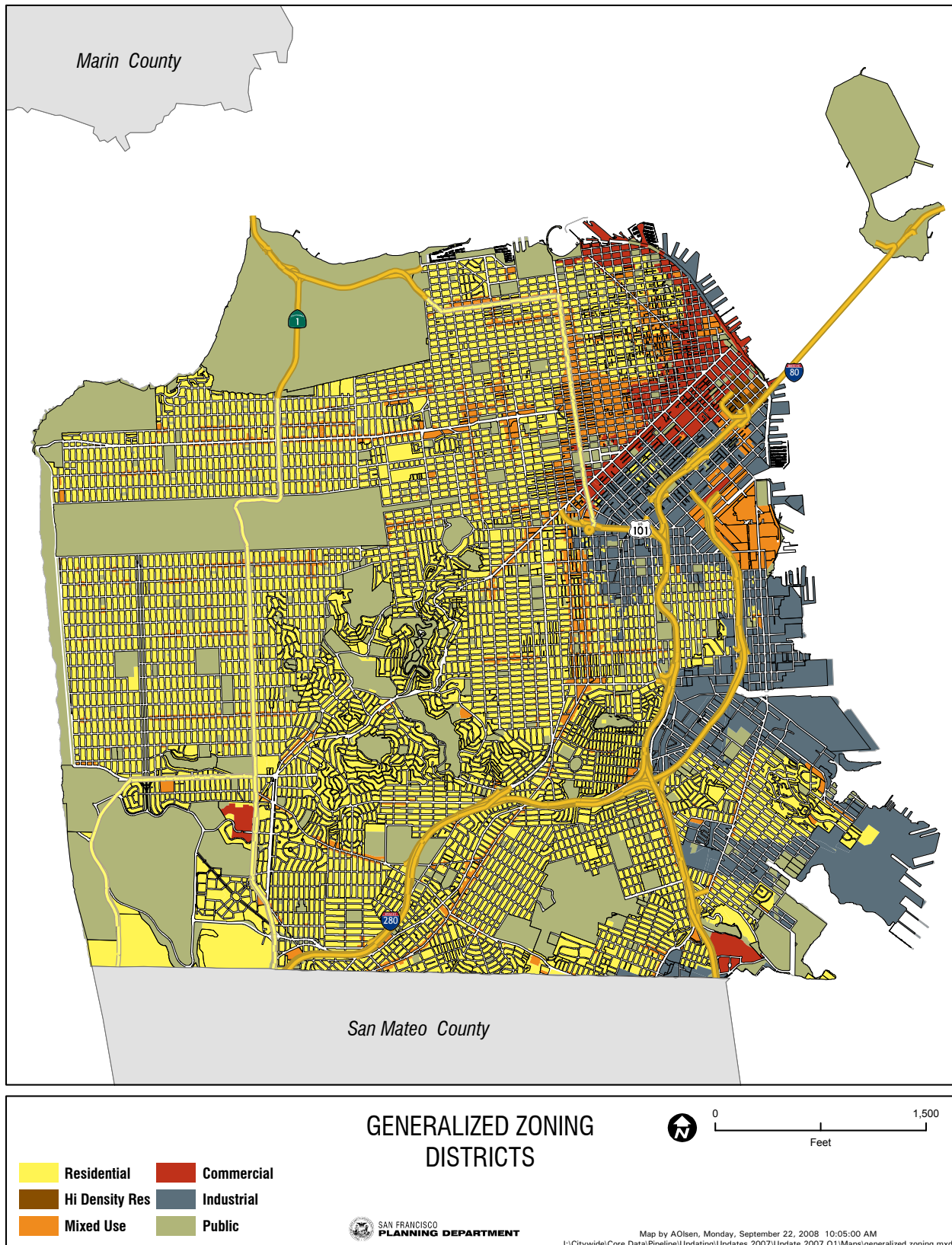
**MAP 2: Residential Pipeline**



**MAP 3: Commercial Pipeline**



**MAP 4: Generalized Zoning Districts**





**TABLE 10: List of Projects and Data Dictionary**

PROJECT LOCATION	
<b>Block Lot</b>	Concatenated 4-digit assessor block + 3-digit assessor's lot Numbers
<b>Address</b>	Name and address of project.
<b>Planning Neighborhood</b>	Areas related to current planning efforts and roughly to city neighborhoods.
PROJECT STATUS	
<b>Under Construction</b>	Project is under construction.
<b>BP Approved</b>	DBI approved building permit.
<b>BP Issued</b>	Project sponsor has picked up approved building permit (proxy measure of under construction)
<b>BP Reinstated</b>	DBI reinstates a lapsed building permit (lapses after 1 year with no activity).
<b>BP Filed</b>	Application for building permit filed with DBI.
<b>PL Approved</b>	All Planning actions approved.
<b>PL Filed</b>	Project application filed with the Planning Department
<b>Bestdate</b>	The date of the most recent action leading to the BESTSTAT value, i.e., a project's current pipeline status (e.g., date building permit application is filed if BESTAT = BP Filed).
DEVELOPMENT PROFILE	
<b>Units</b>	Net total dwelling units.
<b>Net GSF (Commercial)</b>	Nonresidential gross square feet (GSF). Best interpreted as net new useable GSF with demolition of existing space subtracted (not total project gsf).
	CIE or Cultural, Institutional, Educational includes educational services, social services, museums, zoos, and membership organizations.
	Medical includes health services offices and hospitals and laboratories throughout the City.
	MIPS is largely any activity where information is the chief commodity that is processed (managerial, information, professional, business services, multi-media).
	PDR or Production, Distribution and Repair includes automobile and other repair services throughout the City, plus construction, transportation, communications, utilities, agriculture mining, manufacturing, wholesale trade, and motion picture production distribution, and services located outside of the downtown, transbay, and Northeast Districts. Does not include undeveloped or vacant land area used for PDR activities such as construction yard or open storage area.
	Retail Includes retail trade, amusement and recreation services, and personal services located throughout the City.
	Visitor (or Hotel) includes hotels and other lodging located throughout the City.
<b>Land Use</b>	This field summarises in one word what type of project is being proposed. Apart from the commercial categories listed, this field includes <ul style="list-style-type: none"> <li>- Mixres (when both commercial and residential uses are proposed)</li> <li>- Mixed (when no residential use present and when multiple commercial uses are proposed and not one is dominating (&gt;80% of commercial square feet))</li> <li>- Resident is used to denote any residential project where there is no commercial component.</li> </ul>

# Quarter 2, 2008

Subset of pipeline where project adds either more than 10 units or 10,000 GSF

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
<b>CONSTRUCTION</b>							
3702053	1169 MARKET ST	Mid-Market	13,540	1033	Mixres	Retail/Ent	11/9/2007
3745001	300 SPEAR ST	Rincon Hill	36,000	826	Mixres	Retail/Ent	12/28/2007
3765015	425 First Street	Rincon Hill	-75,816	722	Resident	--None--	7/21/2008
4991279	101 EXECUTIVE PARK BL	Bayview	14,000	450	Resident	--None--	4/3/2008
3719001	301 MISSION ST	Transbay	-102,057	420	Resident	Retail/Ent	5/19/2006
3749059	45 LANSING ST	Rincon Hill	-14,000	305	Resident	--None--	10/10/2007
8704004	300 Berry (Arterra)	Mission Bay	600	268	Mixres	Retail/Ent	3/1/2006
3508053	1340 & 1390 MISSION ST	Market & Octavia	-19,200	237	Mixres	Retail/Ent	4/1/2008
4991039	Jamestown Ave. PUD	Bayview	0	198	Resident	--None--	10/1/2007
8713001	555 MISSION ROCK ST	Port	0	192	Resident	--None--	7/29/2008
0814007	1 POLK ST	Market & Octavia	-5,330	179	Mixres	Retail/Ent	4/23/2008
3785133	673-683 BRANNAN ST, 16	West SoMa	-10,000	162	Resident	--None--	4/8/2005
4021001	601 ALABAMA ST	Mission	2,995	151	Mixres	PDR	5/9/2008
0716006	990 POLK ST	Northeast	-1,668	143	Mixres	Retail/Ent	7/29/2008
3735047	1 HAWTHORNE ST	C-3	-25,279	135	Mixres	Retail/Ent	6/30/2008
3518017	275 10TH ST	West SoMa	0	135	Resident	--None--	7/29/2008
0854009	55 PAGE ST	Market & Octavia	6,170	127	Mixres	Retail/Ent	2/7/2008
3750090	631 FOLSOM ST	C-3	3,677	120	Mixres	Retail/Ent	7/5/2007
5421011	5600 03RD ST	Bayview	-103,453	116	Resident	--None--	7/30/2008
0338025	230 TURK ST	Northeast	3,000	113	Resident	--None--	11/15/2007
3707033	74 NEW MONTGOMERY ST	C-3	-133,619	111	Mixres	MIPS	7/7/2008
4991241	EXECUTIVE PARK (FUTURE	Bayview	0	110	Resident	--None--	7/28/2008
8707001	325 BERRY ST	Mission Bay	0	110	Resident	--None--	5/4/2007
3751153	766 HARRISON ST	East SoMa	-4,171	98	Resident	--None--	1/11/2008
0740011	650 EDDY ST	Northeast	0	83	Resident	--None--	7/17/2008
4228010	1300 Indiana St.	Central Waterfront	-9,800	81	Mixres	Retail/Ent	12/19/2007
0331004	141 MASON ST	C-3	-4,500	81	Resident	--None--	4/21/2008
3752091	831 FOLSOM ST	East SoMa	-10,312	69	Resident	--None--	7/28/2008

Wednesday, September 24, 2008

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Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
8704001	330 BERRY ST	Mission Bay	0	64	Resident	--None--	7/29/2008
0739006	810 VAN NESS AV	Northeast	4,500	52	Mixres	Retail/Ent	7/11/2008
3708056	1 ECKER ST	C-3	-238,920	51	Mixres	Retail/Ent	7/10/2008
0834022	77 VAN NESS AV	Market & Octavia	21,200	50	Mixres	MIPS	7/18/2008
0345012A	168 HYDE ST	C-3	-4,869	31	Resident	--None--	7/23/2008
4106022	910 MINNESOTA ST	Central Waterfront	0	30	Resident	--None--	7/31/2008
0688020	1521 SUTTER ST	Japantown	-7,550	28	Resident	--None--	5/29/2008
4044030	2198 03RD ST/638 19TH S	Central Waterfront	0	24	Resident	--None--	7/20/2007
3589001	2200 Mission St	Mission	-1,400	23	Resident	--None--	7/18/2008
5322045	4800 Third St.	Bayview	669	18	Mixres	Retail/Ent	6/26/2008
3590031	2235 MISSION ST	Mission	0	12	Resident	--None--	1/7/2008
0196008	700 MONTGOMERY ST	Northeast	-22,655	12	Resident	--None--	7/16/2008
7153013	310 DE LONG ST	Ocean View	0	12	Resident	--None--	6/26/2008
0312010	1 KEARNY ST	C-3	27,420	0	Mixres	MIPS	7/24/2008
3905003	2460 ALAMEDA ST	Mission	20,000	0	PDR	PDR	7/30/2008
3940001	201 16TH ST	Port	446,600	0	MIPS	MIPS	7/29/2008
8709006	1500 OWENS ST	Mission Bay	222,181		MIPS	MIPS	6/12/2008

**BP ISSUED**

8720001	435 CHINA BASIN ST	Port	0	319	Resident	--None--	4/3/2007
3701063	55 09TH ST	Mid-Market	2,622	260	Mixres	Retail/Ent	5/19/2005
1084004	3575 GEARY BL	Geary Corridor	0	150	Resident	--None--	11/14/2007
3799007	675 TOWNSEND ST	Showplace & Potrero Hill	35,000	148	Mixres	Retail/Ent	7/23/2004
5421003	5600 03RD ST	Bayview	-6,819	112	Mixres	Retail/Ent	12/2/2005
4058010	2235 03RD ST	Central Waterfront	5,339	102	Mixres	Retail/Ent	6/2/2003
0768013	701 GOLDEN GATE AV	Van Ness Corridor	0	100	Resident	--None--	8/21/2007
0492025	2026 LOMBARD ST	Marina	40,370	61	Mixres	Visitor	4/11/2007
5696036	992 PERALTA AV	Bernal Heights	0	47	Resident	--None--	7/1/2004
1156023	850 BRODERICK ST	Western Addition	0	47	Resident	--None--	9/21/2007
0816002	231 FRANKLIN ST	Market & Octavia	780	33	Mixres	Retail/Ent	11/1/2007
5598008	491 BAY SHORE BL	Bayview	150,265	0	Retail/Ent	Retail/Ent	11/21/2007
5981011	2574 SAN BRUNO AV	Excelsior	16,600	0	CIE	CIE	11/13/2007

Wednesday, September 24, 2008

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Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3973002C	480 POTRERO AV	Showplace & Potrero Hill	23,800		CIE	CIE	8/17/2004

### ***BP APPROVED***

3704069	973 MARKET ST	Mid-Market	8,372	100	Mixres	Retail/Ent	9/15/2005
3789003	72 TOWNSEND ST	East SoMa	0	74	Resident	--None--	1/16/2008
0031001	2351 POWELL ST	Northeast	-74,250	74	Resident	--None--	11/17/2004
3519067	346 09TH ST	West SoMa	4,125	58	Mixres	Retail/Ent	5/27/2004
3706063	721 MARKET ST	C-3	-70,000	44	Mixres	MIPS	5/5/2005
0334008	430 EDDY ST	C-3	0	24	Resident	--None--	3/7/2005
5868006	4 CRAUT ST	Outer Mission	0	18	Resident	--None--	10/20/2005
0041019	7 VANDEWATER ST	Northeast	-280	12	Mixres	Retail/Ent	10/28/2004
6190033	81 ERVINE ST	Visitation Valley	40,000	2	Resident	--None--	1/25/2008
2607099	399 BUENA VISTA EAST A	Upper Market	15,720		CIE	CIE	7/14/2005
0297005	524 POST ST	C-3	23,375		Retail/Ent	Retail/Ent	5/6/2004

### ***BP Filed***

3783001	801 BRANNAN ST	Showplace & Potrero Hill	-115,000	557	Mixres	Retail/Ent	8/17/2005
4991240	601 CRESCENT WY	Bayview	0	411	Resident	--None--	1/14/2004
3748006	340 FREMONT ST	Rincon Hill	-42,650	384	Mixres	Retail/Ent	9/19/2005
5431A001	5800 03RD ST	Bayview	-90,000	355	Mixres	Retail/Ent	9/28/2005
3911001	1 HENRY ADAMS ST	Showplace & Potrero Hill	-2,055	212	Mixres	Retail/Ent	8/17/2005
3787026	655 04TH ST	East SoMa	-2,356	192	Mixres	Retail/Ent	1/13/2006
3722008	140 NEW MONTGOMERY S	C-3	-365,778	118	Resident	--None--	4/8/2008
0871016	1844 MARKET ST	Market & Octavia	-2,067	113	Mixres	Retail/Ent	4/21/2008
0667018A	1529 PINE ST	Northeast	-8,176	113	Resident	--None--	3/19/2007
0691008	1285 SUTTER ST	Northeast	-8,308	107	Mixres	Retail/Ent	12/6/2007
0348015	277 GOLDEN GATE AV	Mid-Market	-49,945	88	Resident	--None--	10/18/2007
4059009	2298 03RD ST	Central Waterfront	14,000	80	Mixres	Retail/Ent	2/6/2006
3747012	325 FREMONT ST	Rincon Hill	0	70	Resident	--None--	7/20/2005
3736085	48 TEHAMA ST	Rincon Hill	0	66	Resident	--None--	7/12/2006
6569004	3400 CESAR CHAVEZ ST	Mission	2,147	60	Mixres	Retail/Ent	11/1/2007

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Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3548032	1875 MISSION ST	Mission	0	60	Resident	--None--	2/10/2006
1052023	2420 SUTTER ST	Marina	-1,900	58	Mixres	MIPS	3/30/2007
1228005	690 STANYAN ST	Haight Ashbury/Cole Valle	10,800	56	Mixres	Retail/Ent	2/15/2006
0287014	300 GRANT AV	C-3	0	56	Resident	--None--	12/22/2006
3774025	250 BRANNAN ST	East SoMa	-127,396	51	Resident	--None--	1/30/2007
0056006	1789 MONTGOMERY ST	Northeast	0	51	Resident	--None--	10/27/2005
0293002	153 KEARNY ST	C-3	-40,000	51	Resident	--None--	3/28/2006
3731126	229 07TH ST	East SoMa	16,196	49	Mixres	MED	9/23/2005
3703086	570 JESSIE ST	Mid-Market	-15,000	47	Resident	--None--	2/2/2006
3532014	299 VALENCIA ST	Market & Octavia	3,940	44	Mixres	Retail/Ent	11/9/2006
0596024	1946 POLK ST	Northeast	-9,245	43	Mixres	Retail/Ent	11/14/2007
1450008	5400 GEARY BL	Geary Corridor	-10,748	39	Mixres	Retail/Ent	6/27/2008
3731003	226 06TH ST	East SoMa	0	37	Resident	--None--	6/16/2008
0349001	101 GOLDEN GATE AV	Mid-Market	20,000	35	Mixres	CIE	8/25/2005
0619012	1860 VAN NESS AV	Northeast	1,625	35	Mixres	Retail/Ent	2/21/2006
0668012	1465 PINE ST	Northeast	0	35	Resident	--None--	3/16/2005
0343014	181 TURK ST	Mid-Market	3,060	32	Mixres	Retail/Ent	8/23/2006
0756001	1345 TURK ST	Western Addition	0	32	Resident	--None--	1/23/2008
3754039	1075 FOLSOM ST	East SoMa	5,000	31	Resident	--None--	12/22/2005
3754066	1091 FOLSOM ST	East SoMa	-2,250	30	Resident	--None--	6/10/2005
3542009	2140 MARKET ST	Market & Octavia	2,624	28	Mixres	Retail/Ent	11/17/2004
4224038	1000 MISSISSIPPI ST	Showplace & Potrero Hill	0	28	Resident	--None--	5/1/2007
3730023	1174 FOLSOM ST	West SoMa	-5,200	26	Mixres	PDR	7/28/2004
0599008	1840 WASHINGTON ST	Marina	-7,000	26	Resident	--None--	4/14/2006
3727168	1145 MISSION ST	West SoMa	1,996	25	Mixres	Retail/Ent	6/9/2006
3732071	468 CLEMENTINA ST	East SoMa	-500	25	Resident	--None--	7/20/2005
0184031	1355 PACIFIC AV	Northeast	-18,632	24	Resident	--None--	8/24/2006
0274008	850 BUSH ST	Northeast	0	23	Resident	--None--	12/30/2005
3591024	793 SOUTH VAN NESS AV	Mission	5,829	22	Resident	Retail/Ent	2/10/2006
5817006	300 ALEMANY BL	Bernal Heights	0	22	Resident	--None--	7/7/2006
3752019	870 HARRISON ST	East SoMa	-6,120	22	Mixres	Retail/Ent	7/14/2006
1101022	2139 O'FARRELL	Geary Corridor	-14,712	21	Resident	--None--	10/30/2007



Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3521007	350 11TH ST	West SoMa	0	20	Resident	--None--	4/11/2005
3521005	340 11TH ST	West SoMa	5,682	20	Mixres	Retail/Ent	4/11/2005
3776092	246 RITCH ST	East SoMa	-4,130	19	Resident	--None--	1/5/2007
1127007	1816 EDDY ST	Geary Corridor	0	19	Resident	--None--	6/27/2008
3548039	1801 MISSION ST	Mission	2,600	18	Mixres	Retail/Ent	7/17/2006
7088056	320 RANDOLPH ST	Ocean View	-10,428	18	Mixres	Retail/Ent	8/29/2006
5868007	55 TRUMBULL ST	Outer Mission	0	18	Resident	--None--	12/13/2006
3588012	3500 19TH ST	Mission	2,950	17	Mixres	Retail/Ent	5/1/2006
0666006	1522 BUSH ST	Marina	0	15	Resident	--None--	1/15/2004
3726047	537 NATOMA ST	East SoMa	-5,425	14	Mixres	PDR	9/1/2005
0282004	723 TAYLOR ST	C-3	0	14	Resident	--None--	5/2/2005
1084001B	1 Stanyan Street	Geary Corridor	-1,807	13	Mixres	Retail/Ent	12/14/2007
3557063	208 DOLORES ST	Market & Octavia	0	13	Resident	--None--	11/18/2003
1028028	2829 CALIFORNIA ST	Marina	112	12	Mixres	Retail/Ent	10/31/2007
3732068	456 CLEMENTINA ST	East SoMa	0	12	Resident	--None--	7/11/2005
5260001	4101 03RD ST	Bayview	0	12	Resident	--None--	5/15/2003
6356066	209 HAHN ST	Visitation Valley	0	12	Resident	--None--	6/16/2005
6520036	3135 24TH ST	Mission	-13,640	12	Mixres	Retail/Ent	11/13/2007
3987010	140 PENNSYLVANIA AV	Showplace & Potrero Hill	0	12	Resident	--None--	8/4/2004
0512019	2395 LOMBARD ST	Marina	-1,890	12	Resident	--None--	3/15/2006
0512041	2395 Lombard Street	Marina	5,816	12	Resident	--None--	3/15/2006
1368049	4614 CALIFORNIA ST	Presidio	13,686	0	Mixed	MIPS	1/23/2007
1535016	495 09TH AV	Geary Corridor	17,000	0	CIE	CIE	12/3/2003
4352007	1301 CESAR CHAVEZ ST	Central Waterfront	81,979	0	MIPS	MIPS	10/15/2007
8720016	1455 03RD ST	Mission Bay	380,999	0	MIPS	MIPS	6/10/2008
8709004	1600 OWENS ST	Mission Bay	245,000	0	MIPS	MIPS	11/9/2007
3735063	222 02ND ST	C-3	400,000	0	MIPS	MIPS	11/30/2007
3717019	120 HOWARD ST	C-3	67,000	0	MIPS	MIPS	11/17/2006
0242027	855 SACRAMENTO ST	C-3	20,000	0	Vacant	--None--	3/21/2008
8721012	450 SOUTH ST	Port	333,945	0	MIPS	MIPS	6/26/2008
7380038	655 BROTHERHOOD WY	Lake Merced	15,000	0	CIE	CIE	12/20/2007
1098009	1401 DIVISADERO ST	Geary Corridor	57,000	-21	MIPS	MIPS	12/21/2006

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0269026	350 BUSH ST	C-3	347,300		MIPS	MIPS	8/7/2007

**PL APPROVED**

3746001	201 Folsom St	Rincon Hill	0	806	Resident	--None--	11/18/2003
3507039	1401 MARKET ST	Market & Octavia	525,500	719	Mixres	MIPS	7/20/2006
0857001	55 Laguna Street	Market & Octavia	28,090	491	Mixres	Retail/Ent	1/17/2008
3747001E	399 FREMONT ST	Rincon Hill	-2,256	432	Mixres	MIPS	8/4/2006
4624003	227 West Point Road	Bayview	620	401	Mixres	Retail/Ent	6/12/2008
3547002A	1880 MISSION ST	Market & Octavia	-63,512	194	Resident	--None--	10/6/2005
4106001A	900 MINNESOTA ST	Central Waterfront	-129,260	160	Mixres	Retail/Ent	1/5/2006
0716007	990 Polk Street	Northeast	-1,668	160	Resident	--None--	11/22/2004
1083002	3575 GEARY BL	Geary Corridor	4,200	150	Mixres	MIPS	4/6/2006
7331003	800 Brotherhood Way	19th Street Corridor	0	127	Resident	--None--	12/10/2007
3722082	125 03rd st.	C-3	430,000	95	Mixres	Retail/Ent	4/6/2004
1073013	800 PRESIDIO AV	Geary Corridor	10,180	83	Mixres	CIE	1/25/2008
0331003	125 MASON ST	C-3	0	81	Resident	--None--	10/30/2006
0283004A	620 SUTTER ST	C-3	-46,435	78	Mixres	Visitor	1/23/2006
0287013	300 Grant Ave.	C-3	-1,250	66	Mixres	Retail/Ent	7/10/2008
3788012	166 TOWNSEND ST	East SoMa	-73,625	66	Mixres	Retail/Ent	10/18/2006
0336017	245 HYDE ST	C-3	-26,640	65	Resident	--None--	4/10/2008
0619009	1800 Van Ness Ave.	Northeast	7,383	62	Mixres	Retail/Ent	4/4/2005
6969001	5050 MISSION ST	Outer Mission	-1,270	61	Mixres	Retail/Ent	8/14/2008
0331002	149 MASON ST	C-3	0	56	Resident	--None--	5/4/2006
2515001	2800 SLOAT BL	Outer Sunset	9,656	55	Resident	--None--	3/21/2006
3994003	680 ILLINOIS ST	Central Waterfront	7,926	35	Mixres	Retail/Ent	12/1/2005
0341005	938-942 MARKET ST	C-3	-40,674	33	Mixres	Retail/Ent	4/6/2005
4224015	1004 MISSISSIPPI ST	Showplace & Potrero Hill	0	28	Resident	--None--	11/15/2007
0522002A	2601 VAN NESS AV	Marina	0	27	Resident	--None--	12/2/2003
2623006	376 CASTRO ST	Upper Market	1,900	24	Mixres	Retail/Ent	2/6/2006
0682010	2000 POST ST	Geary Corridor	0	24	Resident	--None--	1/5/2005
0256018	851 CALIFORNIA ST	Northeast	-33,000	23	Resident	--None--	4/19/2006
0807010	580 HAYES ST	Market & Octavia	42,432	22	Mixres	MED	6/19/2008

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3560001	2210 MARKET ST	Upper Market	2,000	20	Mixres	Retail/Ent	2/1/2007
3728014	1234 HOWARD	West SoMa	-1,500	18	Resident	--None--	10/30/2006
6473038	5735- 5743 MISSION ST	Outer Mission	-7,153	16	Mixres	Retail/Ent	6/12/2008
5869014	4199 MISSION ST	Outer Mission	600	12	Mixres	Retail/Ent	8/5/2008
1028003	2829 California Street	Marina	373	12	Mixres	Retail/Ent	1/17/2008
3533024	85 BROSANAN ST (AKA 480	Market & Octavia	0	11	Resident	--None--	3/14/2006
2062031	1801 NORIEGA ST	Outer Sunset	6,400	11	Mixres	Retail/Ent	6/3/2005
3721068	535 MISSION ST	Transbay	296,430	0	MIPS	MIPS	8/2/2007
3794024	144 KING ST	East SoMa	43,845		Visitor	Visitor	10/17/2005
2018003	2400 NORIEGA ST	Outer Sunset	12,366		CIE	CIE	7/17/2008
1764031	1348 10TH AV	Judah Corridor	11,900		CIE	CIE	2/11/2005
0236017	100 CALIFORNIA ST	C-3	68,775		MIPS	MIPS	1/31/2008
3736114	525 HOWARD ST	Rincon Hill	252,793		MIPS	MIPS	6/26/2008
3777047	695 BRYANT ST	West SoMa	25,600		CIE	CIE	4/14/2005

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4886008	Bayview Waterfront Project	Bayview	7,996,866	11379	Mixres	MIPS	12/3/2007
1939001	Treasure I /Yerba B I Dev Ar	Treasure Island	250,000	6000	Mixres	Retail/Ent	12/4/2007
7303001	Parkmerced - 3711 19th Av	Lake Merced	478,383	5677	Mixres	Retail/Ent	1/8/2008
3708006	50 01ST ST	C-3	1,134,000	600	Mixres	Visitor	12/21/2006
3762106	725-765 Harrison Street	East SoMa	26,900	510	Resident	--None--	11/8/2005
4991075	5 THOMAS MELLON CR	Bayview	55,960	499	Mixres	Retail/Ent	3/9/2006
3756003	350 08TH ST	West SoMa	56,700	416	Mixres	Retail/Ent	9/7/2007
4355006	3240 Third Street	Central Waterfront	-32,969	391	Mixres	Retail/Ent	4/20/2006
3732009	900 FOLSOM ST	East SoMa	6,340	300	Mixres	Retail/Ent	7/6/2007
3766009	105 HARRISON ST	Rincon Hill	0	259	Resident	--None--	10/29/2007
0350003	1066 MARKET ST	Mid-Market	5,840	255	Mixres	Retail/Ent	7/19/2006
0697037	1333 GOUGH ST	Japantown	0	231	Resident	--None--	7/15/2005
0813006	1390 MARKET ST	Market & Octavia	-1,500	230	Mixres	Retail/Ent	10/25/2006
7324001	77 CAMBON DR	19th Street Corridor	-16,540	195	Mixres	Retail/Ent	8/16/2007
3736074	41 TEHAMA ST	Rincon Hill	-1,400	176	Resident	--None--	10/31/2006
3180003	1150 OCEAN AV	Twin Peaks	15,100	175	Mixres	Retail/Ent	6/26/2008

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Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
0331010	168 EDDY ST	C-3	15,000	170	Mixres	Retail/Ent	11/20/2007
3510001	1415 MISSION ST	West SoMa	300	156	Mixres	Retail/Ent	11/2/2006
3955002	1740 17th Street	Showplace & Potrero Hill	24,208	154	Mixres	Retail/Ent	8/31/2004
3725015	938 HOWARD ST	C-3	-18,956	154	Mixres	Retail/Ent	3/27/2006
3732008	260 05TH ST	East SoMa	-35,843	151	Mixres	Retail/Ent	1/24/2008
0317007	450 OFARRELL ST	C-3	-11,000	144	Mixres	CIE	9/19/2007
3719010	181 FREMONT ST	Transbay	492,866	140	Mixres	MIPS	5/15/2007
8704005	330 & 335 BERRY STREET	Mission Bay	0	131	Resident	--None--	6/8/2007
4646020	900 INNES AVE	Bayview	8,613	128	Mixres	Retail/Ent	9/17/2004
3616007	2558 MISSION ST	Mission	0	125	Resident	--None--	12/21/2005
0792028	365 FULTON STREET	Market & Octavia	0	120	Resident	--None--	6/8/2007
0201012	8 Washington Street	Northeast	12,500	120	Mixres	Retail/Ent	4/9/2003
3726103	114 07th Street	East SoMa	-26,222	119	Mixres	Retail/Ent	3/28/2007
0872005	1960-1998 MARKET ST	Market & Octavia	9,000	115	Mixres	Retail/Ent	5/29/2007
3767305	429 BEALE ST	Rincon Hill	-35,628	113	Resident	--None--	9/27/2007
0526021	2550 VAN NESS AV	Northeast	-51,353	109	Mixres	Retail/Ent	5/17/2005
3508054	66 9TH STREET	Market & Octavia	0	107	Resident	--None--	6/6/2007
3703079	1036-1040 MISSION ST	Mid-Market	6,000	106	Mixres	Retail/Ent	12/21/2007
3912001	1-25 Division Street	Showplace & Potrero Hill	-35,453	100	Mixres	Retail/Ent	1/26/2006
3749064	FOLSOM AND ESSEX	Rincon Hill	0	100	Resident	--None--	6/8/2007
0250001	1401 CALIFORNIA ST	Northeast	-19,056	95	Mixres	Retail/Ent	6/13/2008
0059003	1620 MONTGOMERY ST	Northeast	-39,796	95	Resident	--None--	1/27/2005
3740027	SPEAR STREET	Rincon Hill	0	85	Resident	--None--	6/8/2007
3784085	570 TOWNSEND ST	West SoMa	-17,729	85	Mixres	PDR	8/16/2007
0345002	145 LEAVENWORTH ST/ 3	C-3	0	84	Resident	--None--	7/13/2006
1052024	2655 BUSH ST	Marina	-40,617	84	Mixres	Retail/Ent	4/29/2008
3732074	251 06TH ST	East SoMa	1,450	83	Mixres	Retail/Ent	9/29/2004
0165006	717 BATTERY ST	Northeast	20,519	78	Mixres	MIPS	6/15/2007
0808036	401 Grove Street	Market & Octavia	7,000	70	Mixres	Retail/Ent	5/23/2007
3753140	935 FOLSOM ST	East SoMa	-13,808	69	Mixres	Retail/Ent	5/25/2006
3535001	2001 MARKET ST	Market & Octavia	-14,517	69	Mixres	Retail/Ent	6/13/2008
4045006	2121 3rd Street/740 Illinois	Central Waterfront	-5,000	66	Mixres	Retail/Ent	4/11/2006

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3639004A	2660 HARRISON ST	Mission	-11,423	62	Resident	--None--	9/16/2004
3994001B	2065 03RD ST	Central Waterfront	-4,725	62	Mixres	Retail/Ent	6/7/2006
3543011	2175 MARKET ST	Market & Octavia	5,813	60	Mixres	Retail/Ent	8/31/2006
0323015	472 ELLIS ST	C-3	-65,926	60	Resident	--None--	4/2/2008
3725101	474 NATOMA STREET	C-3	0	58	Resident	--None--	12/5/2007
5992A060	495 CAMBRIDGE ST	Excelsior	0	56	Resident	--None--	5/4/2006
3776149	424 BRANNAN ST	East SoMa	0	55	Resident	--None--	12/22/2005
3753005	205 SHIPLEY ST	East SoMa	-11,000	51	Mixres	Retail/Ent	5/26/2006
0595013	1645-1661 PACIFIC AV	Northeast	-27,275	50	Resident	--None--	7/25/2007
4591A010	SHIPYARD PARCEL 54	Bayview	0	50	Resident	--None--	6/8/2007
0855011	4 OCTAVIA ST	Market & Octavia	3,530	49	Mixres	Retail/Ent	5/14/2008
3534069	25 DOLORES ST	Market & Octavia	-19,037	46	Resident	--None--	7/17/2006
3980007	1717 17TH ST	Showplace & Potrero Hill	-13,369	41	Mixres	PDR	12/22/2005
3701020	1270 Mission Street	Mid-Market	4,258	36	Mixres	MIPS	5/12/2004
0279011	1080 SUTTER ST	Northeast	1,339	35	Mixres	Retail/Ent	10/25/2006
0570010	1622 BROADWAY	Marina	0	34	Resident	--None--	9/15/2005
3794014	111 TOWNSEND ST	East SoMa	-13,136	34	Mixres	Retail/Ent	12/14/2004
2636025	Crestmont Drive	Inner Sunset	0	34	Resident	--None--	3/25/2004
3753081	345 06TH ST	East SoMa	324	33	Mixres	Retail/Ent	9/15/2005
6935001	1607-1649 Ocean Ave.	Ocean View	-19,485	31	Resident	--None--	5/4/2006
3639002	2652 HARRISON ST	Mission	-7,250	30	Resident	--None--	1/11/2006
0620006	1601 LARKIN ST	Northeast	-19,050	28	Resident	--None--	8/25/2004
4228015	1240 MINNESOTA ST	Central Waterfront	20,500	27	Mixres	PDR	9/29/2004
0279014	1299 BUSH ST	Northeast	-5,532	26	Mixres	Retail/Ent	8/31/2004
3752023	397 05TH ST	East SoMa	5,000	24	Mixres	Retail/Ent	9/24/2007
4711118	HUDSON AVENUE (NW CO	Bayview	0	24	Resident	--None--	6/6/2007
3732112	452 TEHAMA ST	East SoMa	-4,917	20	Mixres	Retail/Ent	2/15/2007
0028014	1255-1275 COLUMBUS AV	Northeast	-15,564	20	Mixres	Retail/Ent	6/19/2008
1460014B	420 29TH AV	Geary Corridor	-2,500	20	Mixres	Retail/Ent	7/25/2006
3728069	121 09TH ST	West SoMa	-4,975	20	Mixres	Retail/Ent	3/31/2005
0853021	102-104 OCTAVIA STREET	Market & Octavia	0	20	Resident	--None--	6/8/2007
3721019	562 HOWARD ST	Transbay	0	19	Mixres	Retail/Ent	10/3/2007

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Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3729081	209 09TH ST (aka 207 9th	West SoMa	-11,600	19	Resident	--None--	10/13/2005
0194009	740 WASHINGTON ST	Northeast	-9,050	18	Mixres	CIE	2/28/2007
0729046	1210 SCOTT STREET/1770	Geary Corridor	0	18	Resident	--None--	6/8/2007
3794002A	750 02ND ST	East SoMa	-2,710	18	Mixres	Retail/Ent	5/8/2008
1018012	3657 SACRAMENTO ST	Geary Corridor	0	18	Resident	--None--	11/20/2007
3596113	899 VALENCIA ST	Mission	4,705	18	Mixres	Retail/Ent	8/11/2005
0303015	865 POST ST	Northeast	-4,658	18	Resident	--None--	5/11/2004
0101004	1741 POWELL ST	Northeast	-11,795	17	Mixres	Retail/Ent	6/4/2008
3148001	4550 MISSION ST	Outer Mission	-3,250	17	Mixres	Retail/Ent	7/19/2006
3617008	1050 VALENCIA ST	Mission	400	16	Mixres	Retail/Ent	12/20/2007
0668013	1461 PINE ST	Northeast	-5,416	15	Mixres	Retail/Ent	9/2/2004
0839029	261 OCTAVIA ST	Market & Octavia	0	15	Resident	--None--	8/9/2006
3197010	1446 OCEAN AV	Twin Peaks	-2,500	13	Resident	--None--	5/15/2008
4108003C	1025 TENNESSEE ST	Central Waterfront	-6,550	12	Mixres	Retail/Ent	9/9/2004
3715002	115 Steuart Street	Port	46,748	0	MIPS	MIPS	5/2/2008
3704071	949 Market Street	Mid-Market	367,000	0	Retail/Ent	Retail/Ent	2/22/2008
3704015	942 MISSION ST	Mid-Market	53,514	0	Visitor	Visitor	2/14/2008
8722001	300 16TH ST	Port	312,932	0	MIPS	MIPS	4/25/2008
0173001	600 BATTERY ST	Northeast	92,400	0	MIPS	MIPS	10/17/2007
1149011	350 MASONIC AV	Geary Corridor	69,308	-1	CIE	CIE	9/13/2005
1029003	2901 California Street	Marina	15,604	-3	CIE	CIE	2/2/2007
0138001	802 DAVIS ST	Northeast	245,400		Visitor	Visitor	10/22/2003
3710017	350 MISSION ST	C-3	934,668		MIPS	MIPS	12/21/2006
5431A015	320-350 PAUL AV	Bayview	33,489		PDR	PDR	9/27/2007
0238002	300 CALIFORNIA ST	C-3	61,600		MIPS	MIPS	12/19/2007
0828012	735 Fell Street	Western Addition	16,000		CIE	CIE	7/3/2007
3788039	345 BRANNAN ST	East SoMa	53,030		MIPS	MIPS	4/16/2007
4154001	1001 POTRERO AV	Mission	419,070		CIE	CIE	6/20/2007
3785003	690 05TH ST	West SoMa	32,500		Visitor	Visitor	1/24/2006
0347013	399 GOLDEN GATE AV	Mid-Market	53,000		Retail/Ent	Retail/Ent	12/28/2006
2463A014	2233 VICENTE ST	Outer Sunset	13,469		Retail/Ent	Retail/Ent	4/14/2005
0192014	835-845 Jackson St,Chines	Northeast	68,010		CIE	CIE	6/26/2008

Block Lot	Address	District	Net Comm'l sq ft	Net Units	Land Use	Largest Comm'l	Best date
3533007	250 VALENCIA ST	Market & Octavia	14,926		Mixed	CIE	9/13/2005
3727004	150 07TH ST	West SoMa	10,808		Retail/Ent	Retail/Ent	4/2/2007
9900015	Exploratorium Relocation Pr	Northeast	36,248		CIE	CIE	9/1/2006





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## Acknowledgements

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*Pacific Primary Expansion*, on Grove St, by Aksel K Olsen.

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