TRANSIT CENTER DISTRICT PLAN

Public Workshop #2:

Initial Findings and Proposals

04.30.2008

San Francisco Planning Department

In partnership with:

San Francisco Redevelopment Agency

Transbay Joint Powers Authority

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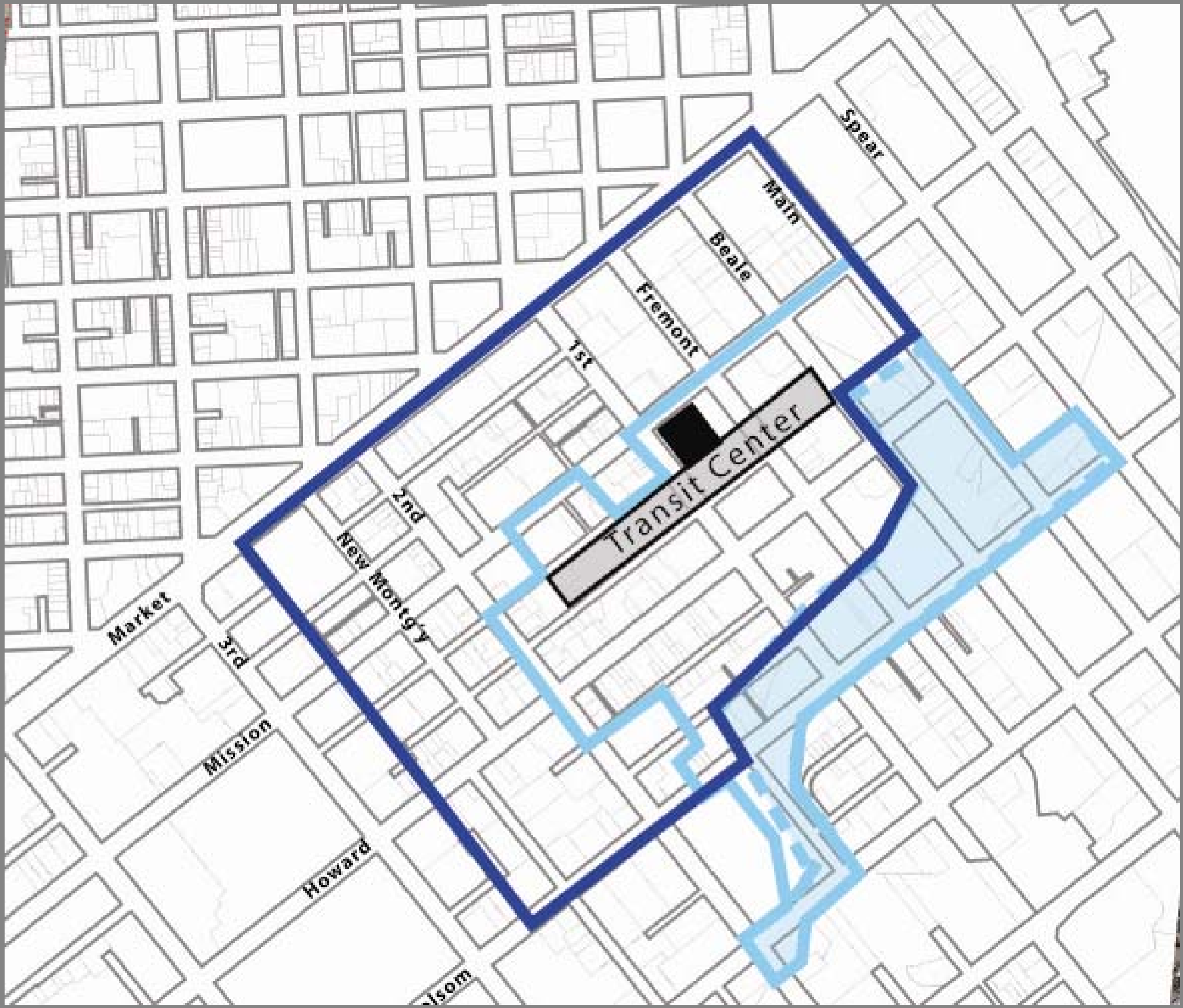
Transit Center District Plan Area

Private and Public parcels around Transit Center, including Transbay Redevelopment Area Zone 2



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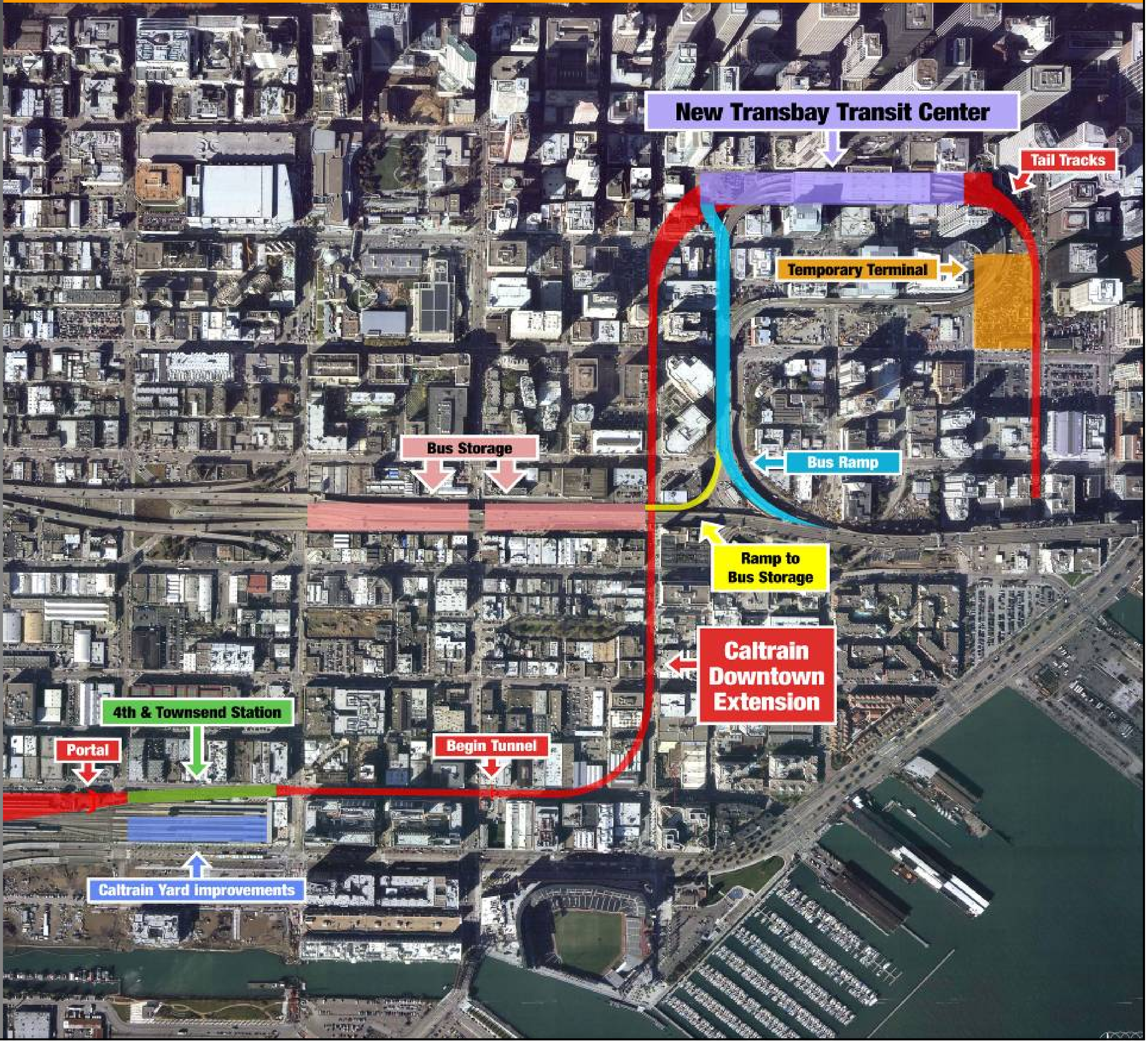
Transbay Transit Center

Transit Center Project



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Transit Center District Plan

Objectives

- Environmentally Responsible Land Use:
  Capitalize on new major **transit investment** with appropriate **land use** response in the downtown core

- Building on the Urban Design Element and Downtown Plan, analyze:
  - Analyze the **downtown form**
  - Identify opportunities and set guidelines and standards to build a high-quality **public realm** and provide **public amenities**

- Generate more **revenue to support the Transbay Transit Center/Caltrain Extension** project and other **public benefits.**

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Tonight's Topics

1. 2007-2035 Growth & Capacity Analysis
   - Land Use

2. Urban Form
   - Form/Skyline/Views
   - Shadow
   - Historic Resources

3. Streets and Open Spaces

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Downtown
Growth Projections:
Demand/Capacity Analysis

Regional Sustainability

SEAL OF THE CITY AND COUNTY OF SAN FRANCISCO

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Downtown Growth and Capacity Analysis

What are the forecasts for regional, citywide and downtown growth in the next 25 years?

What is the capacity of the existing zoning?

What role does the Downtown and Transit Center District have in absorbing future growth?

What are alternative scenarios of land use balance?

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Regional and SF Growth 2007-2035

Two Growth Projections Analyzed

Baseline (Average of Moody's and REMI)
- Generally conservative, trend based on historic local patterns
- Focus on cost of doing business and cost of living
- SF-only model (not based on regional model)
- No consideration of regional policy objectives or new factors (e.g. climate change initiatives, change in transportation patterns, economic or housing policy)

Smart Growth (ABAG 2007)
- Regional model of total Bay Area growth with allocation of jobs and population to cities
- Policy assumption of directing growth to urbanized areas with transit infrastructure (as opposed to "greenfield" suburban peripheral areas) to address air emissions/climate change, sustainability, suburban sprawl, and regional congestion

SF Office Job Growth 2007-2035

	Baseline	**Smart Growth***
Total net new office jobs:	56,760	107,292
Net Office Space Demand:	17.0 million sf	32.2 million sf
Increase over existing :	+16.5%	+31.2%

*Smart Growth Forecast assumes San Francisco maintains present 16% of Bay Area jobs

1970 SF share of Bay Area jobs: 27%
1990 SF share of Bay Area jobs: 19%

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SF Population/Housing Growth 2007-2035

	Baseline*	**Smart Growth****
Net Additional Housing Units:	41,173	56,310
Increase over existing :	+11.4%	+15.6%

*Baseline forecast based on historical 0.4% annual growth in housing units in SF 1970-2006

**Smart Growth forecast is policy-based, constrained by capacity

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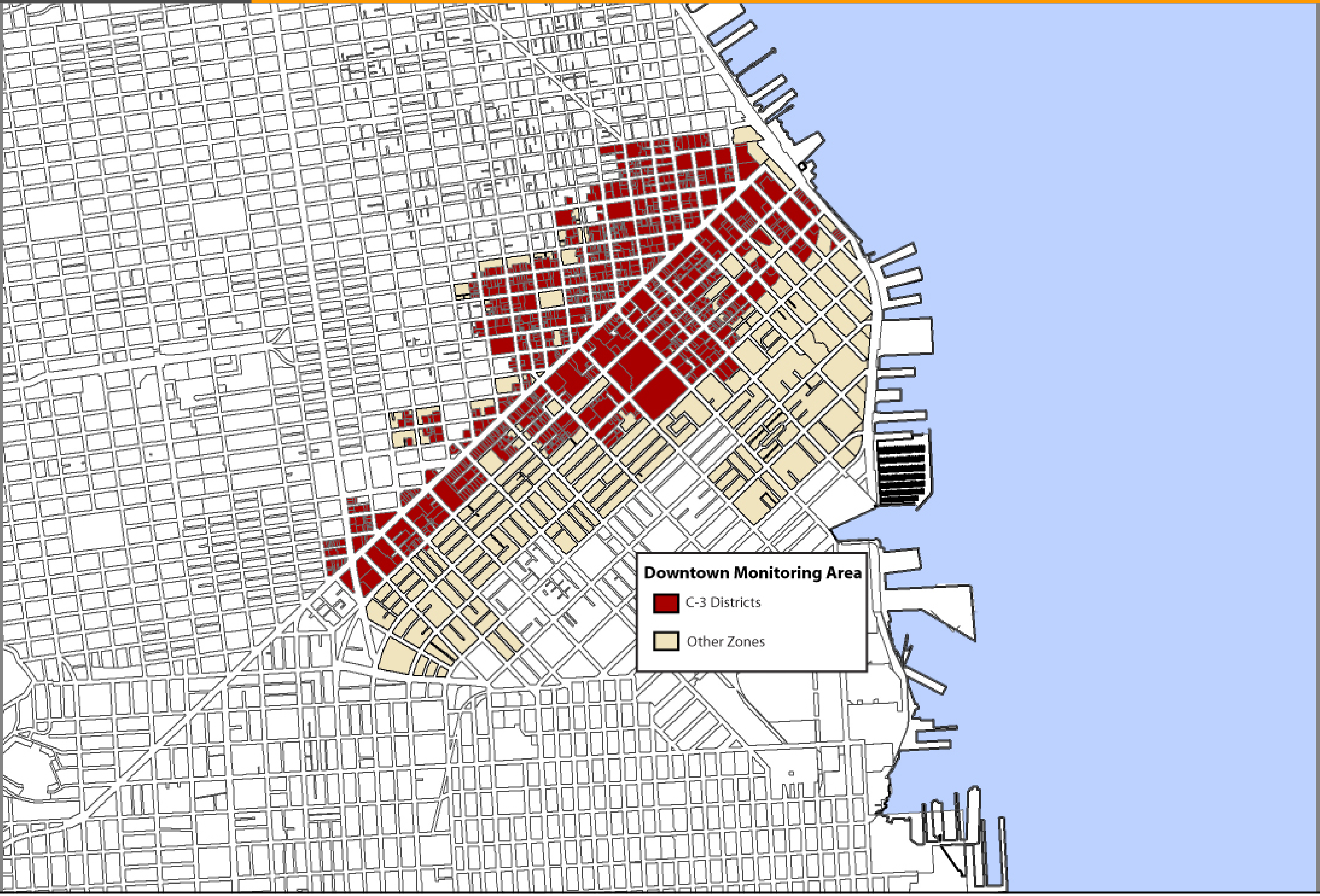
Downtown Monitoring area

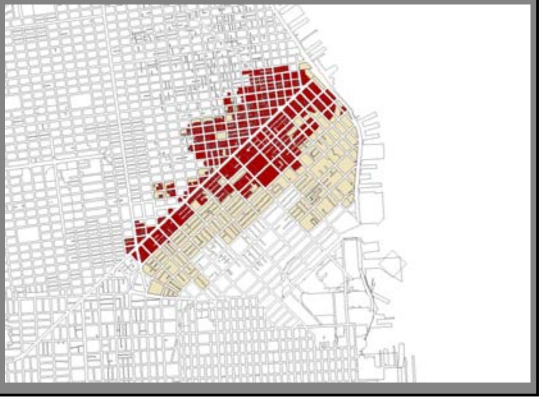


Downtown's Share of Growth 2007-2035

	Baseline	Smart Growth
Net Additional Office Space:*	12.4 million sf	23.5 million sf
Net Additional Housing Units:**	8,580	11,740

*Assumes capture rate consistent with Downtown's current 73% share of citywide office space

**Assumes capture rate consistent with Downtown's 21% share of current citywide pipeline and programmed units (note: Downtown has approx. 6% of City's existing housing units)



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Downtown Pipeline and Unmet Demand

Demand – (Approved + Under Construction + Programmed) = *Unmet Demand*

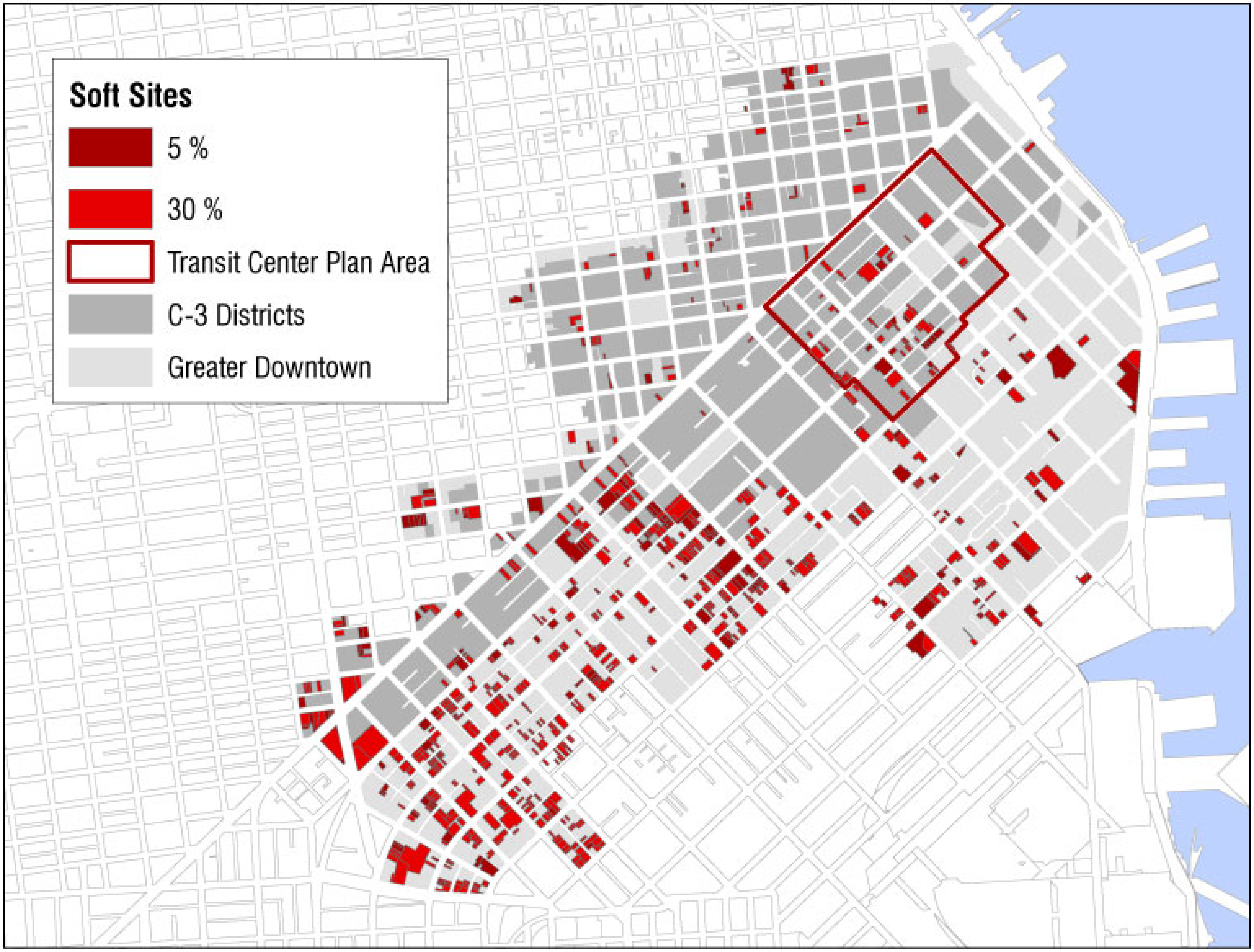
Baseline Projection: Demand and Future Supply, 2007-2035
Downtown San Francisco

Development Type	Downtown Demand	Future Downtown Supply			Unmet Demand
		Approved or Under Construction	Programmed	Total	
Office Space (GSF)	12,430,000 GSF	1,458,000 GSF	1,135,000 GSF	2,593,000 GSF	9,837,000 GSF
Housing (Units)	8,580 Units	5,840 Units	3,470 Units	9,310 Units	0
Housing (GSF)	10,296,000 GSF	7,008,000 GSF	4,164,000 GSF	11,172,000 GSF	0
Total Office/Residential GSF	22,726,000 GSF	8,466,000 GSF	5,299,000 GSF	13,765,000 GSF	9,837,000 GSF

Smart Growth Projection: Demand and Future Supply, 2007-2035
Downtown San Francisco

Development Type	Downtown Demand	Future Downtown Supply			Unmet Demand
		Approved or Under Construction	Programmed	Total	
Office Space (GSF)	23,497,000 GSF	1,458,000 GSF	1,135,000 GSF	2,593,000 GSF	20,904,000 GSF
Housing (Units)	11,740 Units	5,840 Units	3,470 Units	9,310 Units	2,430 Units
Housing (GSF)	14,088,000 GSF	7,008,000 GSF	4,164,000 GSF	11,172,000 GSF	2,916,000 GSF
Total Office/Residential GSF	37,585,000 GSF	8,466,000 GSF	5,299,000 GSF	13,765,000 GSF	23,820,000 GSF

Soft Site Analysis



Downtown Capacity

Total Downtown Area New Development Capacity for All Uses
(based on existing zoning and proposed Eastern Neighborhoods zoning where applicable)

26.8 million gross square feet

Primary Office Zones *(100% office space permitted)*

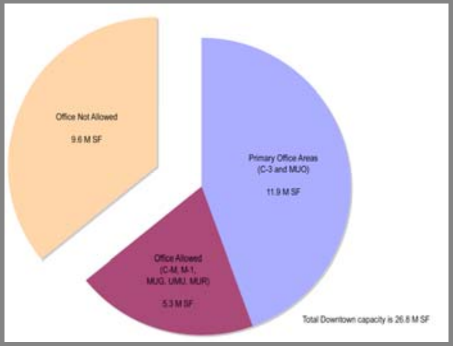
C-3, MUO, SSO	11.9 million gsf

Zones where some offices permitted *(approx. 25% office space permitted)*

C-M, M-1, MUG, UMU, MUR	5.3 million gsf

Zones where offices generally not Permitted

SLR, SLI, SPD, RED	9.6 million gsf



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Downtown Capacity: Land Use Mix

Three Capacity Scenarios analyzed based on alternative balances between two primary uses: office and residential space

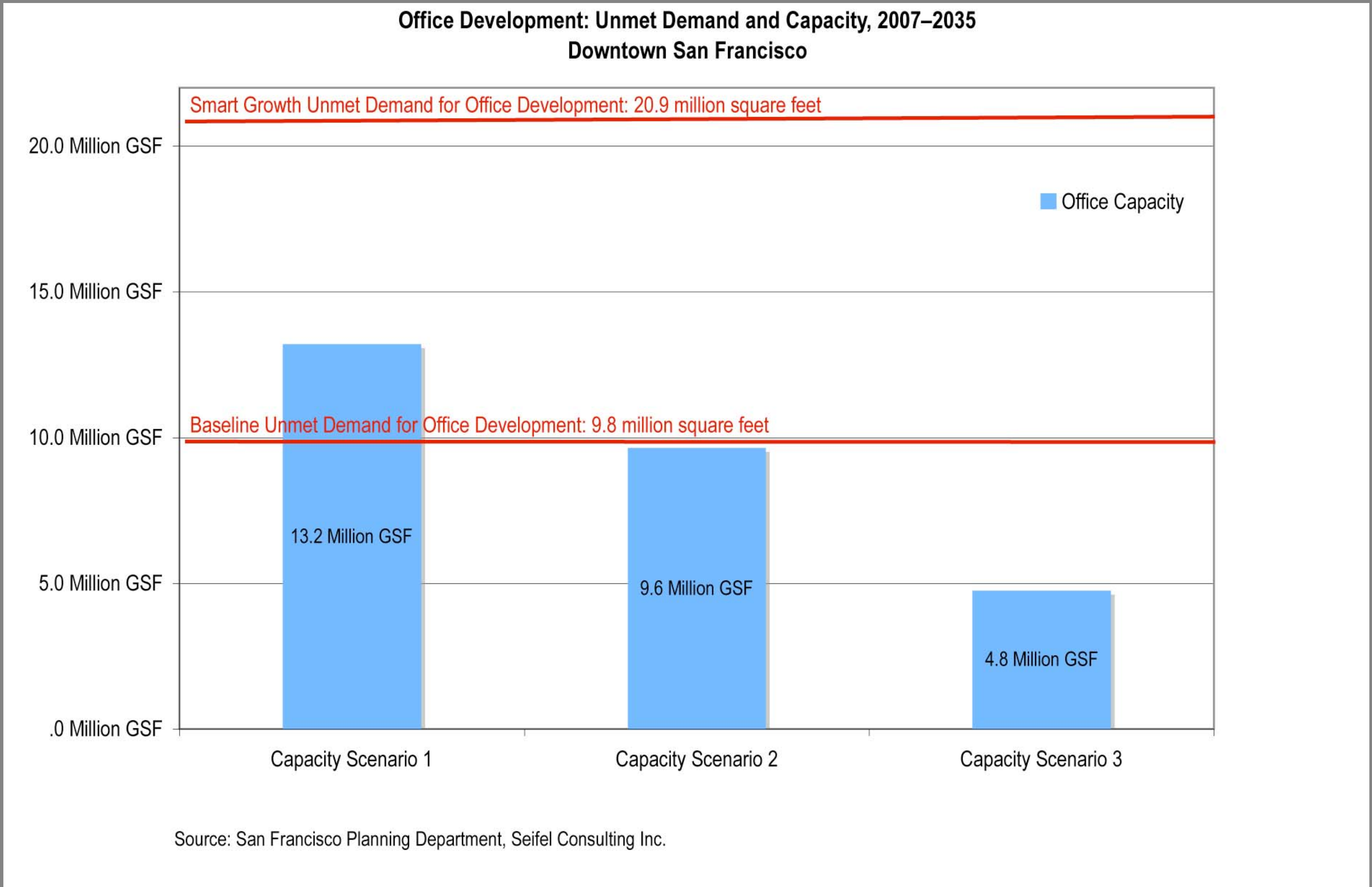
Scenario 1 (Maximum Office Capacity):
100% of Primary Office Area capacity devoted to offices.

Scenario 2 (Mixed Development)
70% of Primary Office Area capacity devoted to offices.

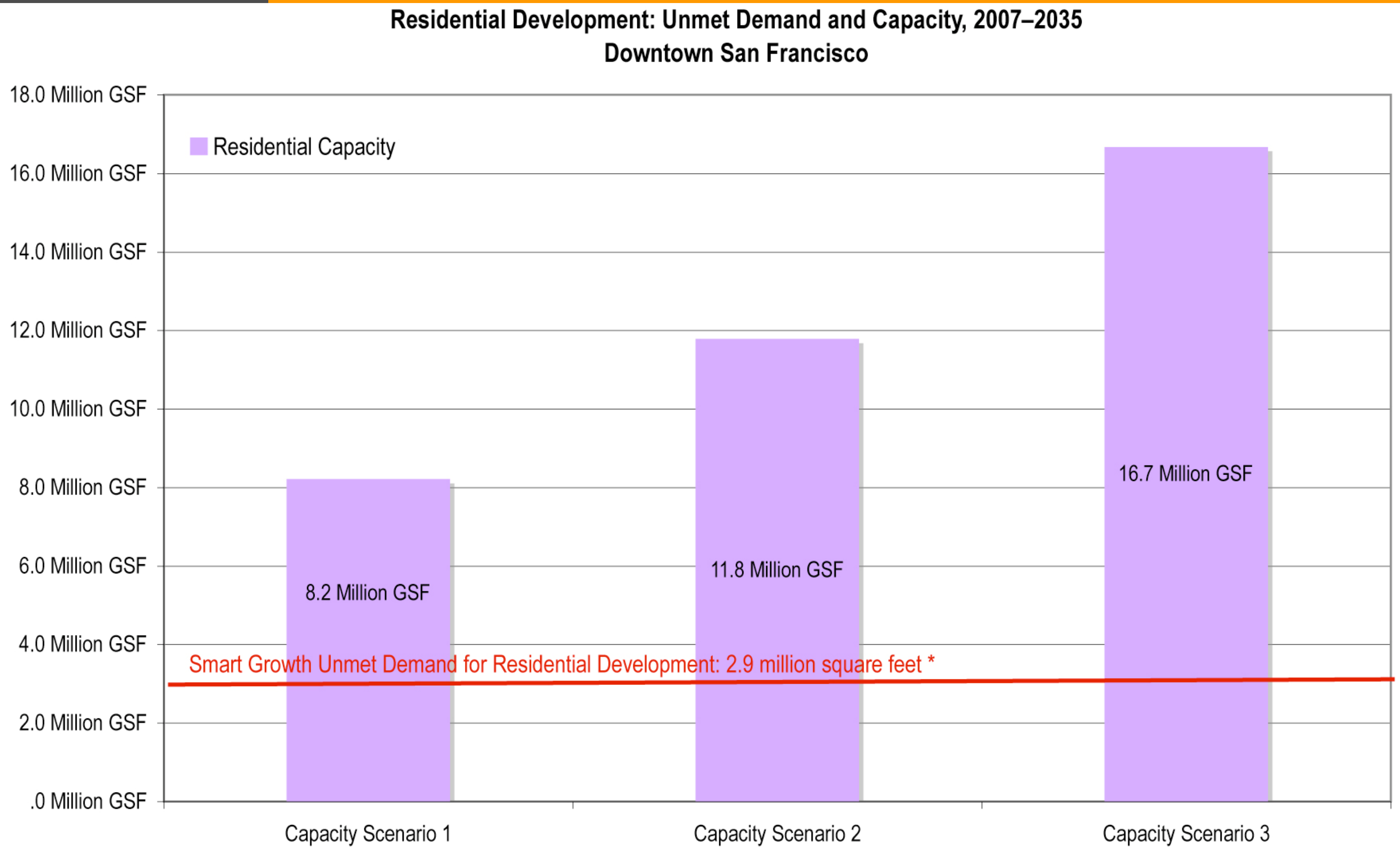
Scenario 3 (Maximum Residential)
Assumes 100 percent of unmet Downtown residential demand is absorbed, with remaining space allocated to offices.

Development Type	**Capacity**		
	Scenario 1: Maximum Office	Scenario 2: Mixed Development	Scenario 3: Maximum Residential
Office Space (GSF)	13,208,000 GSF	9,645,000 GSF	4,751,000 GSF
Housing (Units)	6,850 Units	9,820 Units	13,900 Units
Housing (GSF)	8,219,000 GSF	11,782,000 GSF	16,676,000 GSF
Total Office/Residential GSF	21,427,000 GSF	21,427,000 GSF	21,427,000 GSF
Non-Office/Residential GSF	5,357,000 GSF	5,357,000 GSF	5,357,000 GSF
Total GSF	26,784,000 GSF	26,784,000 GSF	26,784,000 GSF

Capacity vs Growth Demand: Office

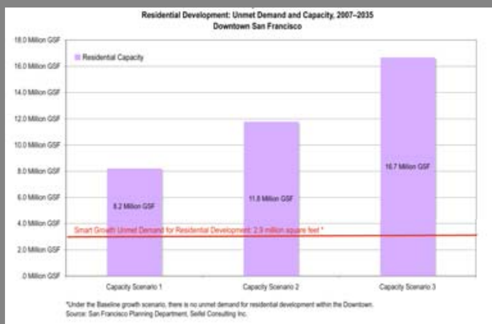


Capacity vs Growth Demand: Housing



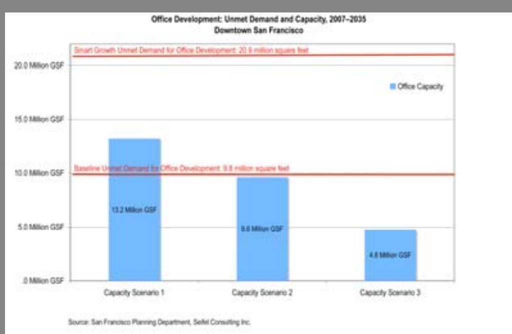
*Under the Baseline growth scenario, there is no unmet demand for residential development within the Downtown.
Source: San Francisco Planning Department, Seifel Consulting Inc.

Downtown Capacity Conclusions



• No more housing capacity is needed Downtown to meet Baseline demand

• There is an excess of capacity Downtown to meet Smart Growth scenario projections.



If capacity is largely reserved for office space where currently permitted...

• There is almost enough capacity to meet Baseline office demand, but…

• There is a significant shortfall in meeting Smart Growth scenario.

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What is the role of Downtown?

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Role of Downtown

Downtown is the City's primary job center:

- Regional hub of transit network
- Protection of neighborhoods
- Economic efficiency, creativity, diversity

Other goals:

- 24-hour activity
- Housing within walking distance of jobs
- Cultural and retail center of the region

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Downtown Plan Goals:

1. Increase Commute Transit Mode Share
   from 64% to 70%.
2. Increase Vehicle Occupancy
   from 1.48 to 1.66 persons/vehicle

2004 Downtown Monitoring Report

Mode Shares:	70% Transit
	7.5% Carpool
	10% Drive alone
	6% Walk and bike
Vehicle Occupancy:	1.2 – 1.4 persons/vehicle

Downtown Plan: Transportation

Commute Patterns

Commute Mode Shares

	Core Downtown SF	SF Other	Downtown Oakland	Rest of Bay Area
Transit Mode	77%	40%	25%	5%
Carpool	8%	10%	15%	11%
Drive Alone	9%	35%	55%	80%
Walk/Bike	6%	15%	5%	4%

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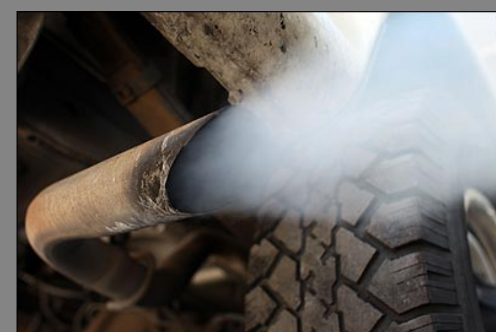
Greenhouse Gas Emissions

Estimated CO2 Emissions for 10,000 Jobs by Location

	Core Downtown SF		SF Other		Downtown Oakland		Rest of Bay Area	
	Workers	CO2	Workers	CO2	Workers	CO2	Workers	CO2
Transit	7,700	5,004	4,000	2,599	2,500	1,625	500	325
Carpool	800	1,194	1,000	1,492	1,500	2,239	1,100	1,642
Drive Alone	900	2,686	3,500	10,447	5,500	16,416	8,000	23,878
Walk/Bike	600	0	1,500	0	500	0	400	0
Total CO2 Emissions *(Metric Tonnes/Year)*		***8,884***		***14,538***		***20,280***		***25,845***



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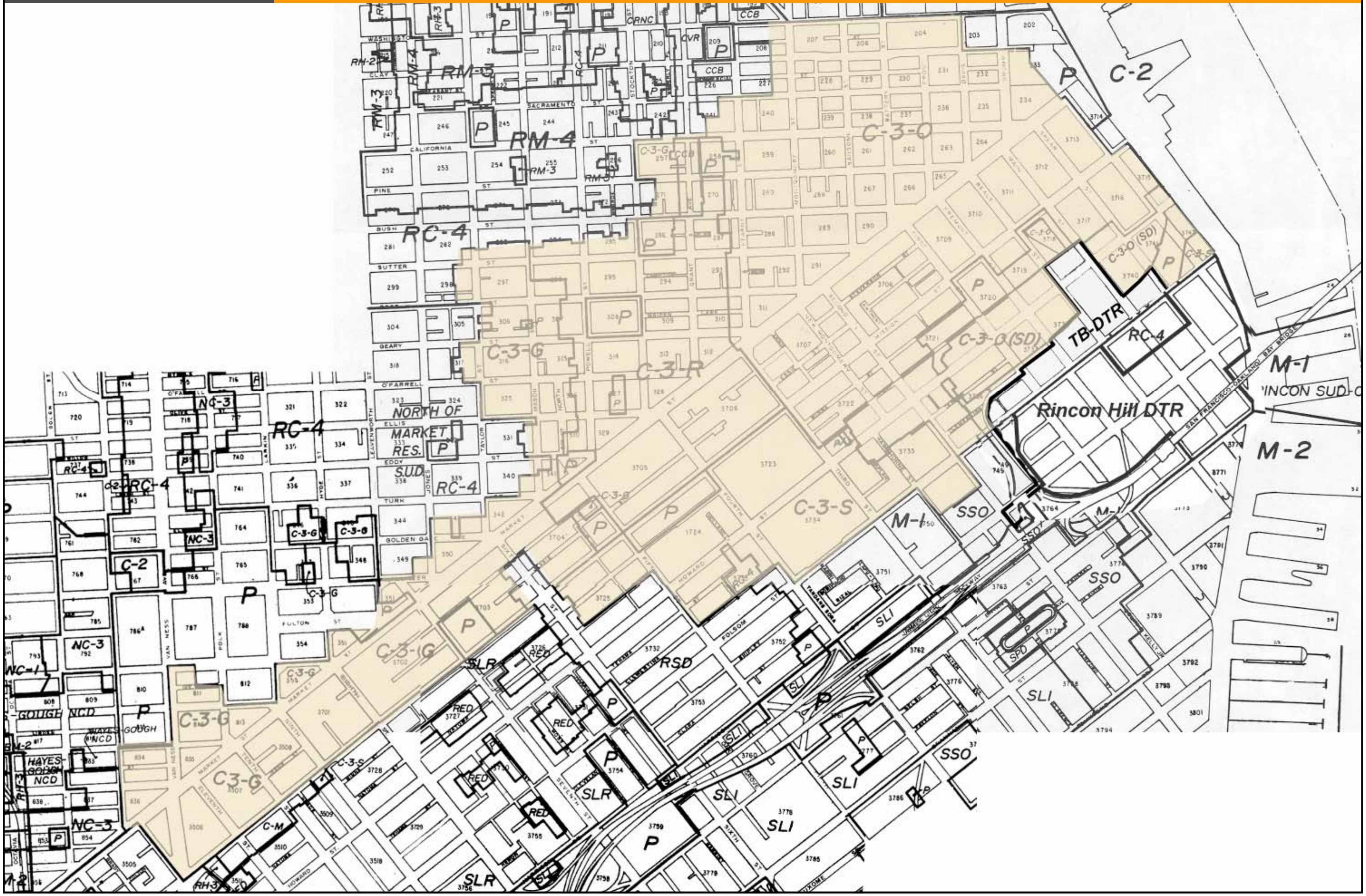
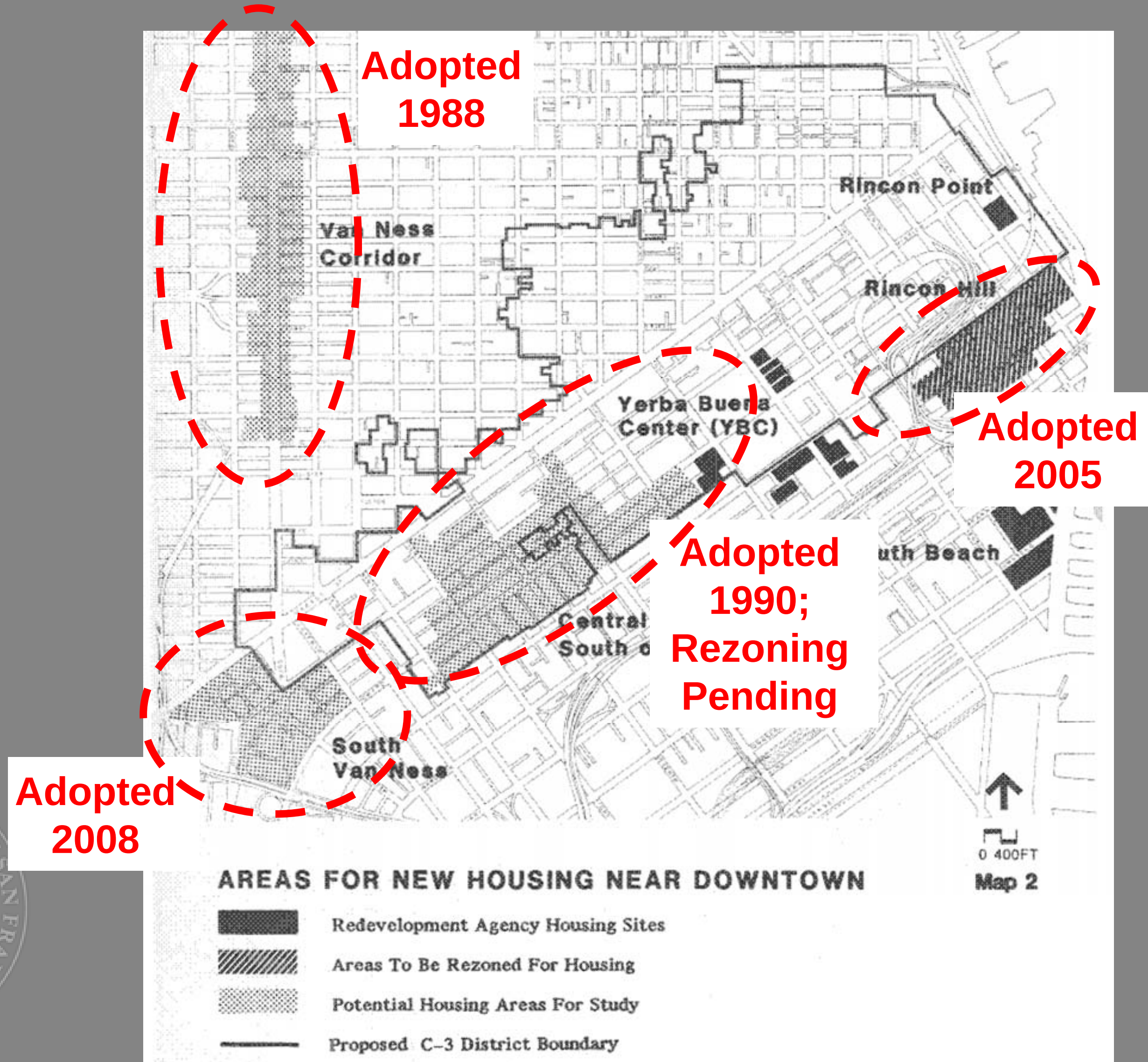
Downtown Plan





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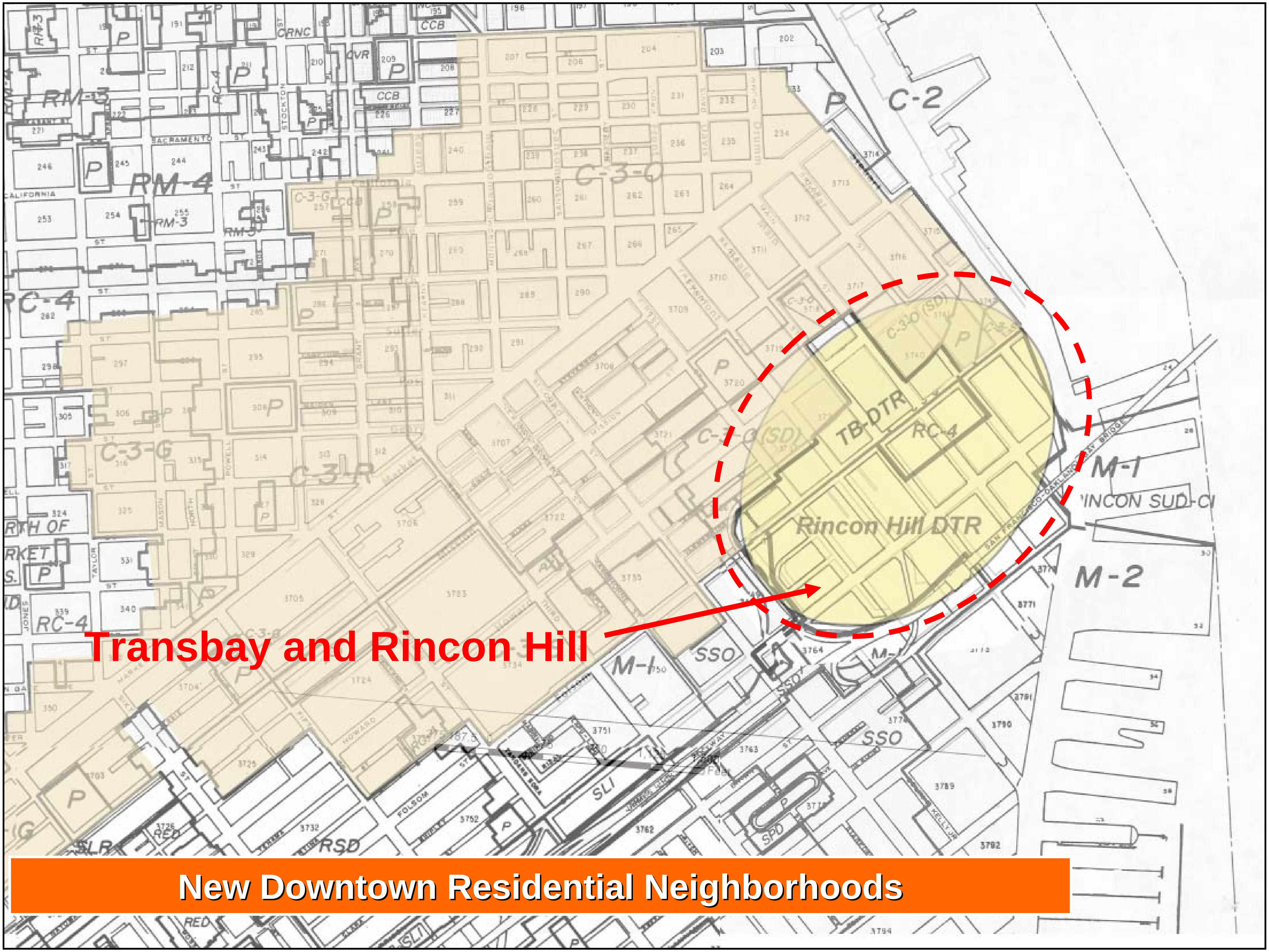
Downtown Plan: Housing

New Downtown Residential Neighborhoods



Transbay Zone 1 and Rincon Hill

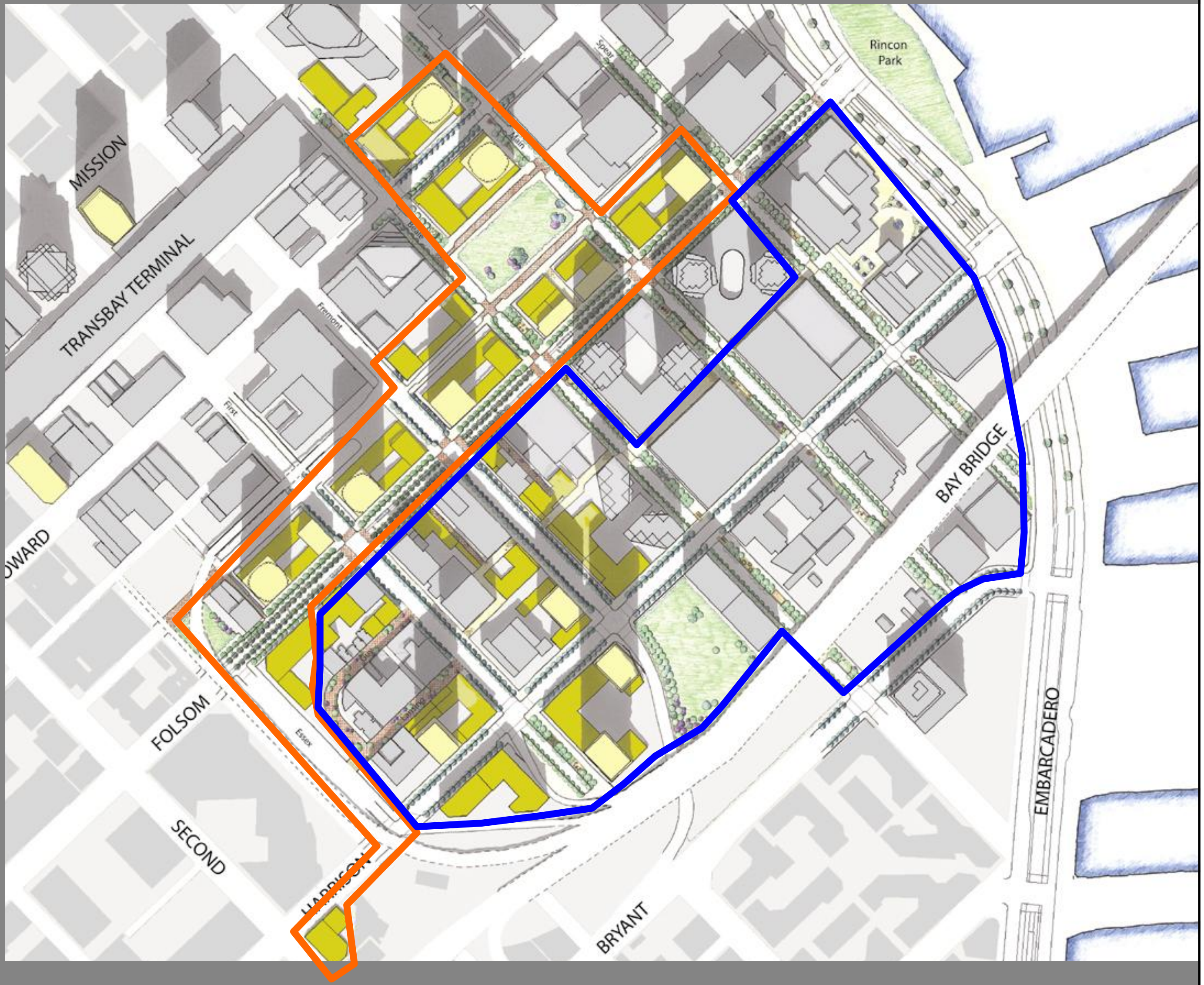
7,000+ new housing units

(3,200 units in Zone 1)

Retail along Folsom St.

Streetscape and Open Space

Public Benefits



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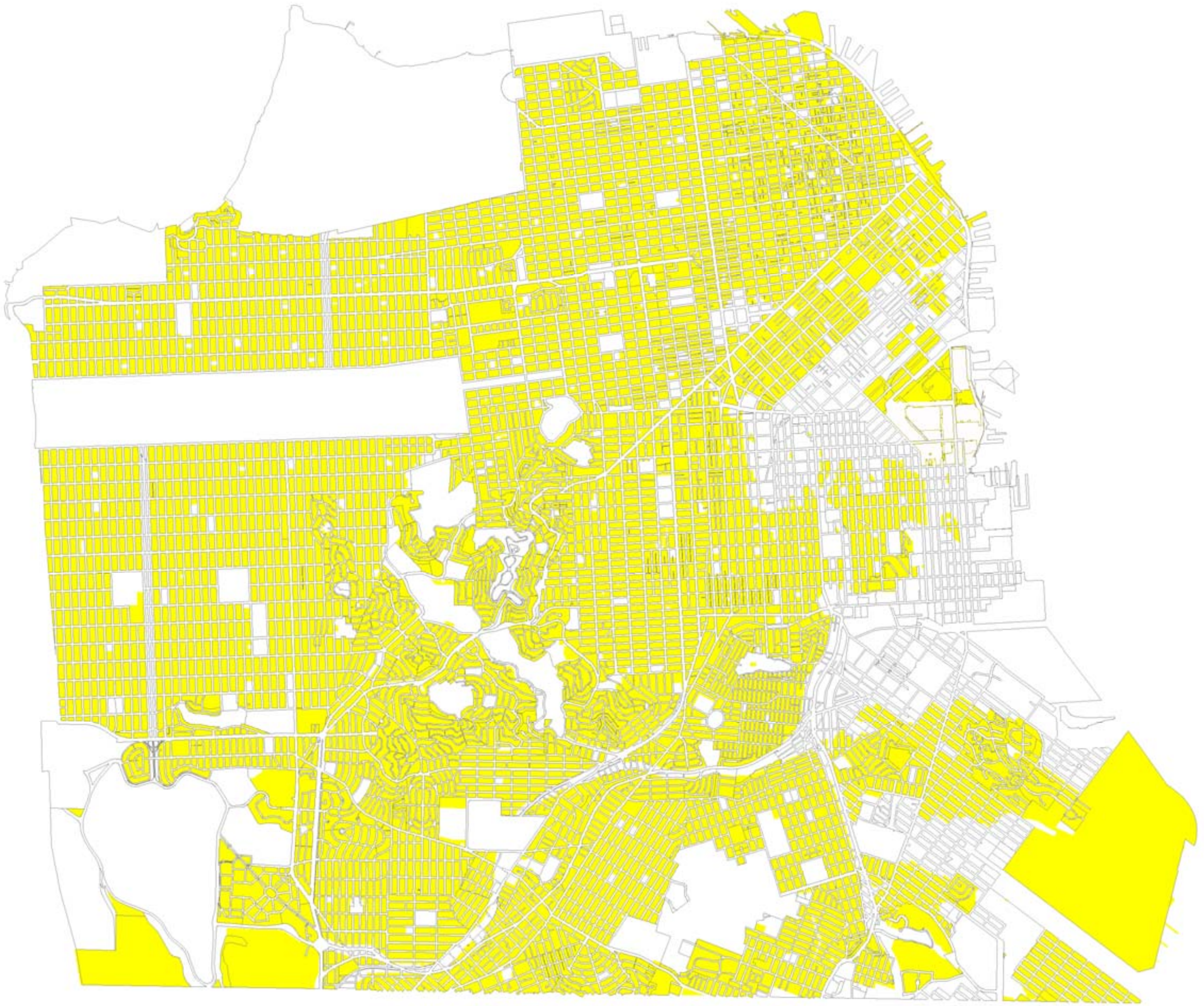
Districts Permitting Offices

Approx. 12.5% of Non-Publicly-Owned City Lot Area

Districts Permitting Housing



Approx. 79% of Non-Publicly-Owned City Lot Area

Citywide Housing Capacity

Citywide Housing Capacity: approx. 90,000 units

	Baseline*	Smart Growth**
2007-2035 Forecast Demand Net Additional Units:	41,173	56,310

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Balance of Uses

Regional sustainability objectives require concentrating high density job centers in areas of highest **transit** accessibility

Protect neighborhoods by preventing spread of major office and commuter growth

Maintain **compact**, walkable job center

Ensure healthy mix of uses for **vibrant place**

Ensure necessary **supporting services** for jobs and residents

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Proposed Land Use Controls

• Reserve bulk of remaining space in core Transit District to ensure that space is available for downtown job growth

• Limit amount of non-commercial uses on major opportunity sites

• Seek to achieve an overall ratio in new construction in the district of 70% office/30% non-office (e.g. residential, hotel, cultural)

• In major new construction sites (e.g. new construction projects with greater than 7:1 FAR), require at least 3 square feet of commercial space for every 1 s.f. of residential, hotel, or cultural space.

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