



# SAN FRANCISCO PLANNING DEPARTMENT

**MEMO**

December 1, 2017

Mayor Edwin M. Lee  
City Hall, Room 200  
1 Dr. Carlton B. Goodlett Place  
San Francisco, CA 94102

**Re: Executive Directive 17-02: Keeping up the Pace of Housing Production**

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Your Executive Directive 17-02 charged the Planning Department with submitting a plan for your consideration by December 1, 2017 outlining process improvement measures to enhance our regulatory and development review functions in order to streamline the approval and construction of housing in San Francisco.

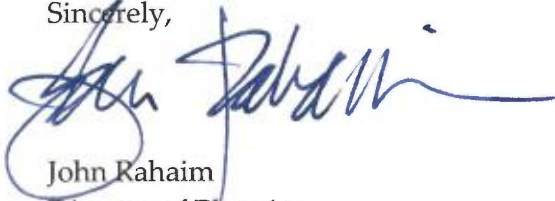
While there is no single solution to the housing crisis in San Francisco, we agree that increasing the supply of housing at all income levels is critical to alleviating the pressures we currently face. San Francisco is building more housing now than in the past, but we are far from overcoming decades of under-production and keeping up with current population growth. While the Planning Department has limited control over the market demand for housing, we do play a considerable role in determining housing supply; our focus has been and will continue to be expanding housing opportunities for all San Franciscans.

I can say without reservation that the Planning Department is staffed by a highly talented, knowledgeable, and dedicated group of people who, despite innumerable challenges outside of their control and growing workloads, are committed to improving this extraordinary city we call home. They take their responsibilities seriously; not just in regards to housing, but to environmental review, historic preservation, design review, and much more. Nonetheless, planners, including myself, recognize that unnecessarily complex processes hinder our ability to do good planning and diminish our ability to serve the needs of the public. We welcome this opportunity to revisit how we do our work.

To this end, we have conducted a comprehensive Department-wide review of our processes – not only those directly related to housing, but the full range of our procedures. We believe that such a holistic review, coupled with responsive policy and administrative and technology-based improvements, will allow more time and attention to be spent on the critical planning issues that are most in need of attention – housing production chief among them. Since shortly after the issuance of your Executive Directive, we facilitated an internal process involving many staff members, and we are excited to share with you the recommendations in this plan that will be most impactful to our ability to approve more housing, faster.

We will continue to work to streamline procedures with your office, the Planning and Historic Preservation Commissions, the Board of Supervisors, and the entire San Francisco community. We look forward to discussing these proposals with you in greater detail and further refining this plan.

Sincerely,



John Rahaim  
Director of Planning

*cc (via electronic mail):*

Jason Elliott, Chief of Staff  
Ken Rich, Director of Development  
Jeff Buckley, Senior Advisor for Housing  
Sarah Dennis-Phillips, Office of Economic & Workforce Development  
President and Members, Planning Commission  
President and Members, Historic Preservation Commission

## INTRODUCTION

The mission of the San Francisco Planning Department is to shape the future of San Francisco and the region by generating an extraordinary vision for the General Plan and in neighborhood plans; fostering exemplary design through planning controls; improving our surroundings through environmental analysis; preserving our unique heritage; encouraging a broad range of housing and a diverse job base; and enforcing the Planning Code.

This mission, and our vision for making San Francisco the world's most livable urban place – environmentally, economically, socially, and culturally – reflect the commitment and values that Planning Department staff apply to an array of tasks, large and small, on a daily basis. In response to the Executive Directive on Housing Production, staff at all levels were invited to identify specific ideas for streamlining and improving our current practices, with the goal of pursuing this mission in the smartest, clearest, and most effective way possible.

To develop this plan, staff inventoried proposals generated from past improvement efforts, formed a steering committee of content experts and senior staff from all organizational divisions, and participated in a series of Department-wide, team-level, and one-on-one discussions with the Planning Director and other senior staff. The Planning Commission has provided initial guidance as well, through two public discussions at hearings on October 5 and November 16, 2017, and through informal engagement between staff and Commission officers.

This process improvements plan is presented in the two following sections.

The first section presents an implementation outline for the plan, including an overview of the anticipated timeframe and phases for implementation, and a description of the refinement process, public review, and adoption steps that will be used for each of the different vehicles for improvement (e.g. Department Procedures, Planning Code Amendments).

The second section presents the process improvement measures themselves, grouped in the following categories:

- A. Application and Intake Procedures
- B. Routine Projects and Permits
- C. Environmental Planning, Historic Preservation, and Design Review
- D. Planning Code and Commission Policies
- E. Administration, Training, and Technology

The implementation phase and type of action are indicated for each process improvement measure, as described in the implementation section.

## I. IMPLEMENTATION AND PHASING

Planning Department staff will work with Planning and Historic Preservation Commissioners, the planning and development community, general public, sister agencies, Mayor's Office, and Board of Supervisors over the coming months to refine and implement the process improvement measures presented in this plan. To ensure that decision-makers and the public remain aware and engaged as these efforts progress, staff will deliver quarterly progress reports to the Mayor's Office, as required by the Executive Directive, as well as to the Planning Commission, beginning in early 2018. These reports will provide an opportunity for all parties to discuss and help shape the city's planning processes.

The various improvement measures in this plan correspond to one of several implementation paths, depending on the type of action to be adopted. These are noted for each measure in the following section, and are as follows:

**Operating Procedures** refer to internal staff practices that may vary by Division or functional team, and that generally are not accompanied by external documents, but are established in internal guidance documents. These are established and modified at the discretion of appropriate managers and senior staff.

**Administrative/Technology Procedures** are Department-wide procedures, technology services, financial and personnel policies that are generally implemented by the Administration Division. These are established at the discretion of the Chief Administrative Officer or the Planning Director, as appropriate, and are generally not accompanied by external documents.

**Department Policies** are formal policies establishing the specific procedures and processes through which the Department executes its core functions, and are established in formal, publicly available documents such as various Applications and Forms, Director's Bulletins, Zoning Administrator Bulletins, Guidelines, and public information documents available online and at the Planning Information Center. These policies are adopted at the discretion of the Planning Director, Zoning Administrator, Environmental Review Officer, or other responsible official of the Planning Department.

*Adoption actions in the above categories generally do not require public notification or community outreach, though targeted informal engagement with community partners and participants in the planning process is common.*

**Commission Policies:** Formal policies establishing the rules governing Planning or Historic Preservation Commission hearings and procedures. These are established by adoption of the Commissions at duly noticed public hearings, and maintained by the Office of Commission Affairs.

**Code Amendments** refer to amendments to the Planning Code, or other parts of the Municipal Code, which can be enacted only through legislative action by the Board of Supervisors and the Mayor. Planning Code Amendments are typically either initiated by the Planning Commission at a duly noticed public hearing and referred to the Board of Supervisors for consideration, or introduced at the Board of Supervisors and referred to the Planning Commission for a formal recommendation before the Board can adopt the amendment. In addition to public hearings, community outreach and public engagement is standard for significant changes, and formal staff analysis and recommendations are required.

The following indicates the anticipated implementation phase for each proposed measure, as follows:

**Phase 1:** To be implemented in the first quarter of 2018, Phase 1 generally includes changes to internal operating procedures, administrative and technology procedures, and departmental policies that are the highest priority for streamlining housing production. This phase will include targeted engagement and outreach with community partners.

**Phase 2:** To be further refined in the first half of 2018 and implemented by the end of the calendar year, these generally include code amendments and Commission policies that require a high level of public outreach and formal action by Commissions or the Board of Supervisors.

**Phase 3:** Measures that are already underway or planned, but have timelines which may stretch beyond 2018, or measures that need to be further developed before being implemented or are lower priorities for streamlining housing production. Timeframes for these measures will be updated as more information is available.

Finally, the Planning Department's efforts to align our procedures and processes with our mission do not begin or end with this plan. The Department will continue to evolve, expand, and refine this plan and will update the Planning and Historic Preservation Commissions, Mayor's Office, Board of Supervisors, and public as appropriate.

## II. PROCESS IMPROVEMENT MEASURES

### A. Application and Intake Procedures

The Department’s procedures for accepting and reviewing development applications are the foundation of the project review process, including the Department’s ability to inform the public, initiate review, and establish clear entitlement timeframes and expectations. Current procedures allow for multiple rounds of overlapping review and can create opportunities for confusion, redundant work, and unnecessary delays. Of all residential new construction projects currently under review, roughly half were initiated more than two years ago, exceeding the longest entitlement timeframe of 22 months established in the Executive Directive.

The following proposed measures would comprise a significant shift in the way the Department, and project sponsors, engage in the review process. These changes are proposed to establish clear and consistent project descriptions; streamline the way staff conduct project review; clarify expectations for the Department and project sponsors; and integrate the entitlement timeframes established in the Executive Directive into the development review process.

A.1. Preliminary Project Assessment (PPA) Review	Action	Phase
A.1.1. Convert the PPA letter to an <b>abbreviated PPA response packet</b> including a cover letter stating key policy and design issues related to the project and expected entitlement path; checklists summarizing how specific Planning Code and environmental review provisions will apply to the project; and a policy factsheet to be included as an attachment, which will cover broader policy considerations that may or may not apply to the specific project and are currently included as standard language in PPA letters. PPA responses will be delivered <b>no later than 60 days following application</b> , rather than the current 90-day response period.	Department Policy	1
A.1.2. Revise and clarify <b>intake requirements for PPA applications</b> , as needed, and reassess intake staffing practices to ensure applications supply all necessary information in a complete and acceptable manner prior to commencing review.	Department Policy; Operating Procedures	1
A.1.3. <b>Discontinue acceptance of an Environmental Evaluation Application (EEA) concurrently with the PPA.</b> EEAs will be accepted as part of a consolidated Development Application (see A.2.1 below). This change will significantly improve the value and efficiency of the environmental review process by ensuring that project descriptions are sufficiently stable prior to commencing review.	Department Policy	1

<p>A.1.4. <b>Reduce and consolidate the number of internal and external meetings associated with the PPA review.</b> Internal project review meetings will be consolidated into a single meeting held concurrently with the project's (UDAT) Urban Design Advisory Team review meeting. Only one meeting with the applicant team will be provided, as an optional meeting following issuance of the PPA response packet.</p>	<p>Department Policy</p>	<p>1</p>
<p>A.1.5. Revise <b>staffing practices among Divisions</b> for PPA applications to maximize efficiency and value of each Division's role in the review process.</p>	<p>Operating Procedures</p>	<p>1</p>

<p><b>A.2. Development Application and Review Process</b></p>	<p><b>Action</b></p>	<p><b>Phase</b></p>
<p>A.2.1. Provide <b>one consolidated Development Application</b> to be submitted for all projects that require an entitlement action or environmental review, including supplemental forms to capture necessary detail related to specific entitlements (e.g., Conditional Use Authorization), Environmental Evaluations, Historic Resource Evaluations, and Streetscape Plans, as applicable. This Development Application will include a master project description that will greatly improve certainty and consistency.</p>	<p>Department Policy</p>	<p>1</p>
<p>A.2.2. Within <b>30 days from the filing date</b>, provide the applicant a <b>notice that the Application was deemed complete or not complete</b>, including an assessment of its responsiveness to any requirements stated in the PPA response packet and specifying any outstanding items that are required. This 30-day review period will recommence each time a revised Application is received until it can be deemed complete.</p>	<p>Department Policy</p>	<p>1</p>
<p>A.2.3. Once an <b>Application is deemed complete</b>, issue a <b>first consolidated Notice of Planning Department Requirements (NOPDR)</b> or state that nothing additional is required, in a consistent timeframe. Once the applicant has submitted a response to the NOPDR, staff will have 30 days to verify if the response is complete; this review period will recommence with any subsequent responses to the NOPDR, if necessary.</p>	<p>Department Policy</p>	<p>1</p>
<p>A.2.4. Upon verification of a complete response to the first NOPDR, <b>notify the applicant of the project's entitlement schedule</b> (i.e. 6, 9, 12, 18, or 22 months per the Executive Directive), including target deadlines for intermediate milestones and deliverables and the project's entitlement hearing date before the Planning Commission. Planning Code compliance review and environmental review will commence no sooner than this notification.</p>	<p>Department Policy</p>	<p>1</p>

A.2.5. Develop all necessary <b>administrative and technical capabilities</b> to implement this Application procedure, including any necessary modifications to application fee schedules, electronic permit tracking functions, and internal staff and case assignment practices.	Administrative/ Technology Procedures	1
A.2.6. Revise Director's Bulletin No. 2 to establish clear department-wide <b>criteria for Priority Application Processing</b> to support the entitlement timeframes for residential projects established in the Executive Directive and develop all necessary administrative and technology capabilities to implement.	Department Policy	1

<b>A.3. Plan Submittal and Intake</b>	<b>Action</b>	<b>Phase</b>
A.3.1. Adopt a <b>uniform set of Application Submittal Guidelines</b> , including required size, format, and content of plan sets and a single point of contact for the project sponsor team.	Department Policy	1
A.3.2. Develop capability to <b>accept applications and plans online</b> to enhance staff's capacity to efficiently review submittals for consistency and completeness.	Administration/ Technology	2
A.3.3. Establish clear <b>communication protocols</b> for sponsors to contact staff during the review process, including guidelines for when requests for review meetings may be granted or deferred.	Operating Procedures	1
A.3.4. Establish <b>function-based email addresses</b> (i.e. HRE@sfgov.org) that go to the appropriate intake staff or staff team, rather than relying on individual staff members' direct contact information.	Administration/ Technology	1

<b>A.4. Public Notification and Community Outreach</b>	<b>Action</b>	<b>Phase</b>
A.4.1. Complete <b>the Planning Department website strategy and design upgrade</b> to improve the overall user interface, user experience, transparency and availability of public documents and information about the Department's projects, initiatives and procedures. The completion of the website redesign will make it easier for members of the public to locate the information and services they need, including the capabilities to support the below alternative notification proposals.	Administration/ Technology	2
A.4.2. Notification Format and Content		
a. Convert mailed notice packet to a <b>postcard format with a web link to plans and applications</b> for active projects within the noticing period to expand public access to this information while reducing staff time and material resources to prepare and mail packets. Make hard copies available for pick-up at the Planning Department or by phone request.	Planning Code Amendment; Administration/ Technology	2



b. Adopt <b>consistent requirements for content, size, and format</b> for all notice types, including mailed and posted notice, to streamline staff time spent preparing notices and reduce room for error in noticing materials.	Planning Code Amendment	2
c. Use the Permit and Project Tracking System (PPTS) to <b>automatically generate notice content</b> from project records.	Administration/ Technology	2
d. Explore <b>alternatives to newspaper noticing</b> for actions that require general notification, such as email lists and online posting to the Planning Department or other City websites in order to expand public access to this information while freeing up staff time and reproduction resources for other needs.	Planning Code Amendment; Administration/ Technology	2
A.4.3. Notice Period and Mailing Radius		
a. Review <b>required notice periods</b> for consistency and unique considerations of each notice type to reduce staff time and potential for error in fulfilling noticing requirements.	Planning Code Amendment	2
b. Adopt a consistent <b>mailing radius for owners and/or occupants</b> for all notice types to reduce staff time and potential for error in fulfilling noticing requirements.	Planning Code Amendment	2
A.4.4. Streamline Required Notice Types		
a. Revise <b>land use types that require 312 notice</b> in NC and Mixed-Use Districts to ensure efficient use of staff time and focus attention on those uses are of specific public interest and for which other controls (e.g. Formula Retail) are not available to address the concern. Examples to consider include Limited Restaurant, Restaurant, and Group Housing.	Planning Code Amendment	2
b. Revise 312 notice requirement in the <b>Eastern Neighborhood Mixed Use Districts</b> such that notice is no longer required for change of use from any land use category to any other category, but only for changes of use to or from specific use categories of particular concern.	Planning Code Amendment	2
c. Review <b>additional minor alterations that may be exempted from 311/312 notification</b> in Residential and NC Districts to ensure that routinely permitted scopes of work that have negligible impact to the surrounding neighborhood can proceed with the appropriate level of staff time and resources.	Planning Code Amendment	2
d. Inventory Building Permits that are also required to issue <b>public notice by DBI and other agencies</b> and consider whether such duplicative noticing can be consolidated.	Code Amendments	2
e. Revise <b>notice of Project Receiving Environmental Review</b> content and procedures to align with modifications to other notice types and consolidated Development Application procedures in A.2.1. above.	Department Policy	2

## B. Routine Projects and Permits

The Planning Department exercises jurisdiction over a wide array of changes in the physical environment, ranging from window replacements in single-family homes to the construction of new high-rise towers. Many of the projects that fall within the Department’s purview require detailed and complex staff analysis, and rightfully demand significant time and coordination to properly review. Many other projects, however, can be reviewed and approved in minutes provided clear regulatory guidance and the attention of experienced planning professionals. Already, some 5,000 building permits are reviewed and approved “over the counter” (OTC) at the Planning Information Center (PIC) every year by dedicated staff who also field general planning questions and serve as the first point of contact for more complex projects as well.

The following measures are proposed to enhance the ability of planning staff to process projects that can already be approved over the counter, and expand the projects in this category. Such measures can significantly reduce its permit backlog, reduce project review times, and focus professional resources on the issues most in need of in depth analysis.

<b>B.1. Enhance Capacity for OTC Approvals</b>	<b>Action</b>	<b>Phase</b>
B.1.1. <b>Reassess overall PIC staffing and resources</b> to ensure that OTC permit volume and general inquiries can be accommodated efficiently and with accuracy.	Operating Procedures	1
B.1.2. Assign a <b>Planner Technician position to the PIC</b> to complete permit intake procedures, provide additional support functions, and handle very routine OTC approvals.	Operating Procedures	2
B.1.3. Consider <b>dividing the PIC counter by function</b> (e.g., general questions, approvals and intakes, preservation) to provide more efficient and accurate service to the public by matching specialized staff to the type of inquiry or action and to allow staff to direct their time more efficiently at PIC.	Operating Procedures	1
B.1.4. In collaboration with the Department of Building Inspection, explore <b>replacement of paper building permits with joint electronic tracking</b> by Planning and DBI in the Permit and Project Tracking System (PPTS).	Administration/ Technology (interagency)	2
B.1.5. Integrate the existing <b>CEQA Categorical Exemption checklist into the PPTS interface</b> to allow for faster processing of projects that are already eligible for OTC approval when a Categorical Exemption can be granted.	Administration/ Technology	1
B.1.6. Expand use of Planning stations at DBI 5th floor for <b>"advanced" OTC plan review and approval</b> , including a by-appointment feature, for more complex OTC categories (existing and proposed); pilot these procedures with Accessory Dwelling Unit (ADU) and Unit Legalization projects.	Operating Procedures; Administration/ Technology (interagency)	2

<b>B.2. Expand Permits for OTC Approval</b>	<b>Action</b>	<b>Phase</b>
B.2.1. Identify <b>commonly approved or minor scopes of work</b> that can be regulated by quantitative or descriptive standards (e.g., certain permitted obstructions in yards or setbacks, including limited horizontal additions or infills under existing decks) that can be approved OTC; in some cases also modify thresholds for intake to accommodate very common scopes of work that are typically approved; indicate when certain approvals will require "advanced" OTC capability due to complexity or related code compliance review.	Planning Code Amendment	2
B.2.2. Remove requirement for <b>Certificate of Appropriateness and Minor Permit to Alter for specific scopes of work</b> , within thresholds established in Articles 10 and 11, to eliminate Historic Preservation Commission (HPC) hearings and associated hold times for these, and to allow OTC approval by Preservation planners at PIC. Scopes of work include Rooftop Appurtenances (excluding wireless facilities), Skylights, Automatic Door Operators, and Business Signage.	Planning Code Amendment	2
B.2.3. Provide a clear <b>checklist of acceptable window treatments</b> for Class B (age-eligible, but not surveyed) buildings to allow non-preservation planners to approve window replacement permits OTC more efficiently.	Operating Procedures	1

<b>B.3. Accessory Dwelling Units (ADUs) and Unit Legalizations</b>	<b>Action</b>	<b>Phase</b>
B.3.1. Establish <b>parallel processing procedures</b> for ADUs and Unit Legalizations that will allow for concurrent review by Planning and Department of Building Inspection (DBI) to expedite approval of these small-scale but common density increases.	Department Policies; Operating Procedures (interagency)	1
B.3.2. Provide for <b>combined pre-application meetings</b> for ADUs with Planning, DBI, and Fire Department (SFFD), as needed, upon request of project sponsor.	Department Policies (interagency)	3
B.3.3. Establish an <b>ADU liaison at all responsible agencies</b> (Planning, DBI, SFFD, Public Works, SFPUC) involved in review and approval of ADUs to establish protocols for streamlining permit review and serve as a technical resource and coordinator for staff and project sponsors to simplify and expedite approval of ADUs.	Department Policies (interagency)	3

<p>B.3.4. Develop capability for <b>ADU and Unit Legalization OTC plan review and approval by appointment</b>, with electronic documentation provided in advance, to facilitate faster approvals by using a Planning station at DBI as an exclusive ADU/Legalization station.</p>	<p>Administration/ Technology</p>	<p>1</p>
<p>B.3.5. In collaboration with the Rent Board, develop <b>enhanced procedures for property owners to obtain eviction history information prior to filing a building permit for ADUs</b> to reduce staff time spent on ineligible projects.</p>	<p>Operating Procedures (interagency)</p>	<p>3</p>

**C. Environmental Planning, Historic Preservation, and Design Review**

San Francisco is one of a kind. Our rich cultural and architectural legacy and truly unique natural setting are a justifiable source of pride for all, including the professionals of the San Francisco Planning Department. A complex web of local, state, and federal regulatory frameworks are in place to protect and preserve this unique character, even as the city continues to grow and change. These policies are executed by a committed group of environmental planning specialists, preservationists, architects and designers.

The following measures have been developed by these teams to consolidate, clarify, and strengthen related procedures and processes that have been proven effective, and revisit the practices we recognize can get in the way of good planning. By improving the way we balance environmental, preservation, and design factors in the development process, we enhance our ability to appropriately weigh other factors, like housing opportunity, in the balance as well.

<b>C.1. Environmental Review</b>	<b>Action</b>	<b>Phase</b>
C.1.1. Codify Effective Mitigation Measures		
a. <b>Archeology:</b> Codify archeological review procedures and mitigation measure requirements. Expand archeological sensitivity areas in order to streamline review.	Planning Code Amendment	2
b. <b>Transportation:</b> Create best practices for <u>driveway and curb cut design</u> and off and on street <u>loading and queue management</u> . Codify requirements from these best practices, including potential study requirements.	Planning Code Amendment	3
c. <b>Noise:</b> Revise the <u>Noise Ordinance</u> to require health protective criteria for construction impact equipment and an analysis with a development application that demonstrates proposed mechanical equipment compliance with health protective criteria.	Police Code Amendment	3
d. <b>Air Quality:</b> Adopt a community risk reduction plan and/or legislation that requires health protective criteria for construction exhaust and stationary sources for areas within the air pollutant exposure zone.	Public Health Code Amendment	3
C.1.2. Improvements to Topic-Specific Review Procedures		
a. Transportation		
i. <b>Re-assess department wide transportation review.</b> For small and medium size projects, <u>rely on existing internal intra and inter-departmental review bodies</u> to address the technical and policy related aspects of localized transportation impacts.	Operating Procedure	2

ii. Update <b>Transportation Impact Analysis Guidelines</b> . The department last updated the guidelines in 2002. Specifically, conduct and analyze data that will result in the creation of <b>refined trip generation estimates</b> for newer developments, including the impacts of emerging mobility service.	Department Policy	2
iii. Create and maintain a <b>web-based, travel demand tool</b> using the data from the guidelines update. The tool will reduce staff review time needed to estimate travel demand or "trips generated", and also reduce time and cost associated with iterative review of technical transportation studies provided by external consultants.	Administration/ Technology	3
b. Wind		
i. Create guidelines that outline the criteria, methodology, and thresholds for wind analysis.	Operating Procedure	2
ii. Explore creation of a computerized wind screening tool at environmental planning.	Operating Procedure	3
c. Shadow		
i. Update guidelines that outline the criteria, methodology, and thresholds for shadow analysis. The department last updated the guidelines in 2014.	Planning Code Amendment	2
ii. Revise the Planning Code to allow for <b>administrative modification of shadow impact limits</b> for specific facilities when no environmental impact is found through CEQA-compliant review	Planning Code Amendment	3
C.1.3. Technical studies and consultants		
a. Integrate <b>technical studies analysis into environmental review documents</b> , and include technical elements of the analysis as part of the administrative record instead of requiring a separate technical study and review process. Those technical studies include: air quality, archeology, biology (may need to be separated case by case), noise, preservation, shadow, transportation, and wind.	Operating Procedure	1
b. Revise <b>standards for acceptable deliverables from consultants</b> , including performance standards to reflect target timeframes, and update the list of qualified consultants to ensure the current pool is responsive to all current standards.	Department Policy	1
c. Reassess the criteria for requiring a consultant-prepared technical study.	Operating Procedure	1
e. Develop <b>scope-of-work templates</b> (e.g. checklists) for each technical study. Make these documents easily available to sponsors and consultants early in the process.	Operating Procedure	2

C.1.4. Environmental Review Exemptions		
a. <b>Expand the exemption checklist</b> form to cover more classes of exemption and discontinue "certificates" for exemptions.	Department Policy	1
b. Reassess procedures and applicability of <b>infill exemptions</b> (e.g. Class 32 exemptions).	Department Policy	1
c. Discontinue required <b>development density conformance form ("CPE Referral")</b> to be completed by Current and Citywide Planning divisions for Community Plan Evaluations (CPEs); this verification procedure would no longer be necessary under the proposed modifications to the Development Application and EEA procedures.	Operating Procedure	1
C.1.5. General Environmental Review procedures		
a. Prepare (or request the assigned environmental consultant to prepare) an <b>impact statement tracking sheet</b> that would indicate the likely environmental impacts of a project at the earliest possible stage of environmental review to enhance the clarity and transparency of the review process.	Operating Procedure	1
b. Allow for <b>concurrent drafting and review of administrative draft Initial Studies and single topic EIRs or limited topic EIRs</b> , or include those Initial Study topics to be in a separate, smaller section of EIR in order to consolidate response period and reduce delays between NOP and final determination document.	Operating Procedure	1
c. Create a list of <b>standard short responses for response to comments</b> for project merit and non-CEQA comments.	Operating Procedure	1
d. Clearly define the types of projects to be included in consideration of <b>cumulative impacts</b> .	Operating Procedure	2
e. <b>Reassess planner assignments</b> for Preliminary Project Assessment (PPAs) and Environmental Evaluation Applications (EEAs) (e.g. default to the same planner for both types of review) or create teams that conduct PPA and application completeness review).	Operating Procedure	1

<b>C.2. Historic Preservation Review</b>	<b>Action</b>	<b>Phase</b>
C.2.1. Revise <b>Preservation Bulletin No. 16</b> to provide clear, updated guidance on how the department conducts historic impact analysis – both in determining whether a resource is present and in assessing impacts to historic resources.	Department Policy	2
C.2.2. Complete a <b>citywide historic preservation survey</b> to eliminate case-by-case review for many projects. Prioritize surveying first on areas seeing the most residential development activity and establish criteria for not requiring a new Historic Resource Evaluation (HRE) after survey is conducted at the site clarify the historic review process for already surveyed sites.	Historic Preservation Commission Adoption	3
C.2.3. Reassess <b>Historic Preservation staffing at Planning Information Center (PIC)</b> to expedite review and Over-the-Counter (OTC) approval on historic properties, where appropriate.	Operating Procedures	2

<b>C.3. Design Review</b>	<b>Action</b>	<b>Phase</b>
C.3.1. Identify <b>design guidelines and criteria that could be codified in the Planning Code</b> to reduce the level of individual analysis required for routine scopes of work and design treatments (e.g. define a list of acceptable "high quality materials" in the Planning Code)	Planning Code Amendment	3
C.3.2. <b>Re-evaluate scheduling and staffing</b> of Urban, Residential, and Streetscape Design Advisory Team (UDAT, RDAT, SDAT) review meetings.	Operating Procedures	2
C.3.3. Complete update to the <b>Urban Design Guidelines (UDGs)</b> in order to add greater and more objective specificity of acceptable design approaches to better guide Planning staff and project sponsors.	Planning Commission Adoption	1
C.3.4. Complete and publish a <b>How-To Guide on the residential design review</b> to increase public understanding of the process and decrease staff time related to confusion arising from this process.	Department Policy	1
C.3.5. Create <b>Residential Design Guidelines (RDGs) Matrix</b> template to be used by current planners and design review staff to help establish compliance with the RDGs in lieu of Residential Design Advisory Team (RDAT) notes to increase public understanding of the process and decrease staff time related to confusion arising from this process.	Operating Procedures	1



**D. Planning Code and Commission Policies**

This year marks the centennial of the San Francisco Planning Commission and the subsequent adoption of the City’s first Zoning Ordinance, an occasion to reflect on the essential role that the Planning Commission and Planning Code have played in shaping the character of this unique city over the past century. This history also reminds us that the policies and purview of the Commission are ever-evolving as conditions change. For instance, Conditional Use Authorization (CUA) originated as a means of regulating the placement of gas stations at the beginning of the automobile era, while today the Planning Code requires a CUA in order to *remove* a gas station in many cases. Similarly, the power of Discretionary Review (DR) originated as a means to guarantee public review at a time when the Planning Code did not include the robust development standards, public notification requirements, or thresholds for review that it does today.

While this plan is intended to reinforce the Commission’s authority to exercise such discretion, the Department recognizes that staff time associated with processing DR requests (the equivalent of roughly two full-time planners each year), is one of many areas that should be reconsidered in light of current priorities and conditions. The measures below are proposed to align our policies and practices to better reflect the purview and sophistication of today’s Planning Code; the entitlement timeframes established in the Executive Directive; and the evolving issues we face as a city in order to focus review by planners and Commissioners on those issues most in need of robust public deliberation.

<b>D.1. General Planning Commission Procedures</b>	<b>Action</b>	<b>Phase</b>
<p>D.1.1. <b>Schedule all residential projects for an entitlement hearing automatically</b> within the review timeframes established in the Executive Directive (i.e. 6, 9, 12, 18, or 22 months) at the point of first complete response to NOPDR, as specified in the above proposed Development Application procedures; in cases where the application review is not complete in time for the hearing date, the Planning Director or designated senior manager will report to the Commission the outstanding issues and revised schedule.</p>	Commission Policy	1
<p>D.1.2. Consider a policy to <b>automatically schedule an entitlement revocation hearing for entitled projects</b> to require the projects that have not begun construction within a specific period of time to return to the Commission in order to evaluate progress toward securing necessary building and other permits and to revoke the entitlement if deemed appropriate. This is intended to increase public understanding of the post-entitlement review process, encourage greater collaboration between the Planning Department and Department of Building Inspection (DBI), and enhance oversight of entitled projects.</p>	Commission Policy	2

D.1.2. Revise <b>standards for packet materials</b> to be provided to Commission in advance of hearings by staff (e.g., Executive Summaries, Case Reports, Draft Motions) to include only the most pertinent analysis, deferring to materials provided in the project sponsor application where possible.	Operating Procedures	1
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<b>D.2. Discretionary Review (DR) Procedures</b>	<b>Action</b>	<b>Phase</b>
D.2.1. <b>Automatically schedule the DR hearing</b> for the next hearing date no more than 45 days from the end date of the notice period and require all additional documentation from the DR filer and response from the project sponsor within 2 weeks from the filing date.	Commission Policy	1
D.2.2. <b>Streamline hearing materials for DRs</b> such that Department Staff would prepare only a brief cover memo that would largely serve as a table of contents for attached materials, including Residential Design Advisory Team (RDAT) comments, and materials submitted by the DR filer and project sponsor, including plan sets and photographs.	Operating Procedures	1
D.2.3. <b>Revise RDAT review procedures</b> , such as replacing written RDAT comments with the Residential Design Guidelines (RDG) matrix, adjusting the RDAT review schedule, or revisiting the roles of RDAT staff in review.	Operating Procedures	1
D.2.4. Make requests for <b>additional staff analysis for DR cases</b> as part of a formal motion for continuance by the Commission in order to ensure that staff time is only redirected when the full Commission deems appropriate.	Commission Policy	1
D.2.5. Present all DR cases at Commission by a <b>designated senior staff member</b> working closely with RDAT staff rather than the project planner to ensure greater consistency in staff treatment of DR cases at Commission and to reduce time commitment for planning staff.	Operating Procedures	1

<b>D.3. Conditional Use Authorizations (CUAs)</b>	<b>Action</b>	<b>Phase</b>
D.3.1. Consider making <b>change of use from one formula retail use to another formula retail use</b> , or the addition of a formula retail use within an existing or proposed formula retail use, principally permitted rather than conditionally permitted in order to reduce the number of cases brought to the Commission and Department staff, recognizing that Conditional Use Authorization for the establishment of a new formula retail use in a location previously occupied by another use is an effective policy for regulating the presence of formula retail in the City.	Planning Code Amendment	2

D.3.2. Consider <b>removal of Conditional Use Authorization for HOME-SF</b> projects and provide for administrative approval of certain density bonuses and exceptions designated in the Planning Code in order to facilitate the use of this program and produce more housing, including more affordable units.	Planning Code Amendment	2
D.3.3. Consider removing the requirement to re-issue a Conditional Use Authorization for <b>existing temporary parking lots</b> in C-3 districts, which must currently be renewed every 5 years even when no physical changes are proposed.	Planning Code Amendment	2
D.3.4. Consider removing the requirements for a Conditional Use Authorization for the <b>establishment of a Restaurant or Limited Restaurant</b> in Zoning Districts where no specific controls regarding restaurant concentrations are in place.	Planning Code Amendment	2

<b>D.4. Planning Code Clarification and Reorganization</b>	<b>Action</b>	<b>Phase</b>
D.4.1. Review the Code to ensure <b>consistent and accurate definition of all key terms</b> , including in different Articles, and eliminate areas of duplicative or outdated definitions (e.g., "Development Application")	Planning Code Amendment	2
D.4.2. Continue to pursue <b>reorganization of certain Articles to clarify key terms, use categories, exceptions, and procedures</b> and ensure that the provisions of each Article are readily understandable to the general public, project sponsors, and planners with minimal room for ambiguity or interpretation. Article 7 (Neighborhood Commercial Districts) was recently reorganized in this manner. Articles 8 (Mixed Use Districts) and 9 (Mission Bay Districts) have been identified for upcoming reorganization efforts.	Planning Code Amendment	2

<b>D.5. Planning Code Section Refinements</b>	<b>Action</b>	<b>Phase</b>
D.5.1. Remove the requirement that all Inclusionary units provided through the <b>Inclusionary Affordable Housing Program</b> be ownership units unless the sponsor has entered into a <b>Costa-Hawkins letter agreement</b> with the City. This change is now permitted by recent changes to state law and is intended to remove an unnecessary administrative burden and achieve significant time savings for staff specializing in housing.	Planning Code Amendment	2
D.5.2. Amend Section 309 to be consistent with Section 329 by allowing the Planning Commission the ability to grant the same exceptions as allowed under Section 329. This will <b>eliminate the need for most variances for new construction projects downtown</b> , similar to the Eastern Neighborhoods Plan Areas.	Planning Code Amendment	2

<p>D.5.3. Consider modifications to the Planning Code to clarify the <b>applicability and entitlement path for 100% affordable projects</b> that qualify for the streamlined approval process recently established in state law.</p>	<p>Planning Code Amendment</p>	<p>2</p>
<p>D.5.4. Provide further clarifications in the Planning Code to <b>reduce the need for Variances for many Accessory Dwelling Unit (ADU) projects</b> (e.g., for exposure, rear yard controls) to reduce process and opportunity for delays for these routine increases in residential density in existing buildings.</p>	<p>Planning Code Amendment</p>	<p>2</p>

**E. Administration, Training, and Technology**

The Department has several technology projects already underway that will streamline the Department’s work in support of the Executive Directive to increase housing production and decrease entitlement and permitting timelines. Many are being pursued as enhancements to the Department’s existing Permit and Project Tracking System (PPTS). These technology projects are intended to increase public transparency, assure data integrity and financial accountability, and improve performance with the overarching goal of supporting staff to increase efficiencies in the Department’s development review functions.

<b>E.1. Technology Improvements</b>	<b>Action</b>	<b>Phase</b>
E.1.1. Configure and implement capability to accept <b>online applications and payments</b> to reduce time spent preparing and processing documents and checks by staff and project sponsors.	Administration/ Technology	2
E.1.2. Develop a solution to perform <b>electronic plan review</b> , to support “advanced” over the counter (OTC) approvals and enhance tracking and coordination of application review.	Administration/ Technology	2
E.1.3. Enhance Planning’s <b>electronic document management system</b> to streamline and improve staff’s ability to store, search, and edit records.	Administration/ Technology	1
E.1.4. Finalize coordination and <b>launch an integrated permit and project tracking system</b> with the Department of Building Inspections (DBI).	Administration/ Technology (interagency)	2
E.1.5. Introduce an <b>impact fee calculator tool</b> for use by project planners to reduce staff time associated with assessing impact fees and to reduce uncertainty and improve consistency and tracking of impact fee collection.	Administration/ Technology	1

<b>E.2. Administration and Training Practices</b>	<b>Action</b>	<b>Phase</b>
E.2.1. Continue ongoing efforts to <b>increase regular training opportunities</b> for staff on current topics such as urban design guideline updates or Planning Code amendments.	Operating Procedures	1
E.2.2. Work with the Department of Human Resources (DHR) to review certain City <b>technology and personnel procedures</b> that impact staff time spent on administrative functions.	Operating Procedures (interagency)	3
E.2.3. Reassess <b>meeting and communication protocols</b> for staff to more effectively manage coordination with project sponsors, other city agencies, community members, and other concerned parties.	Operating Procedures	1