

CALES

Comprehensive Assessment
of Land Use Entitlements

Does local land use regulation support affordable development?

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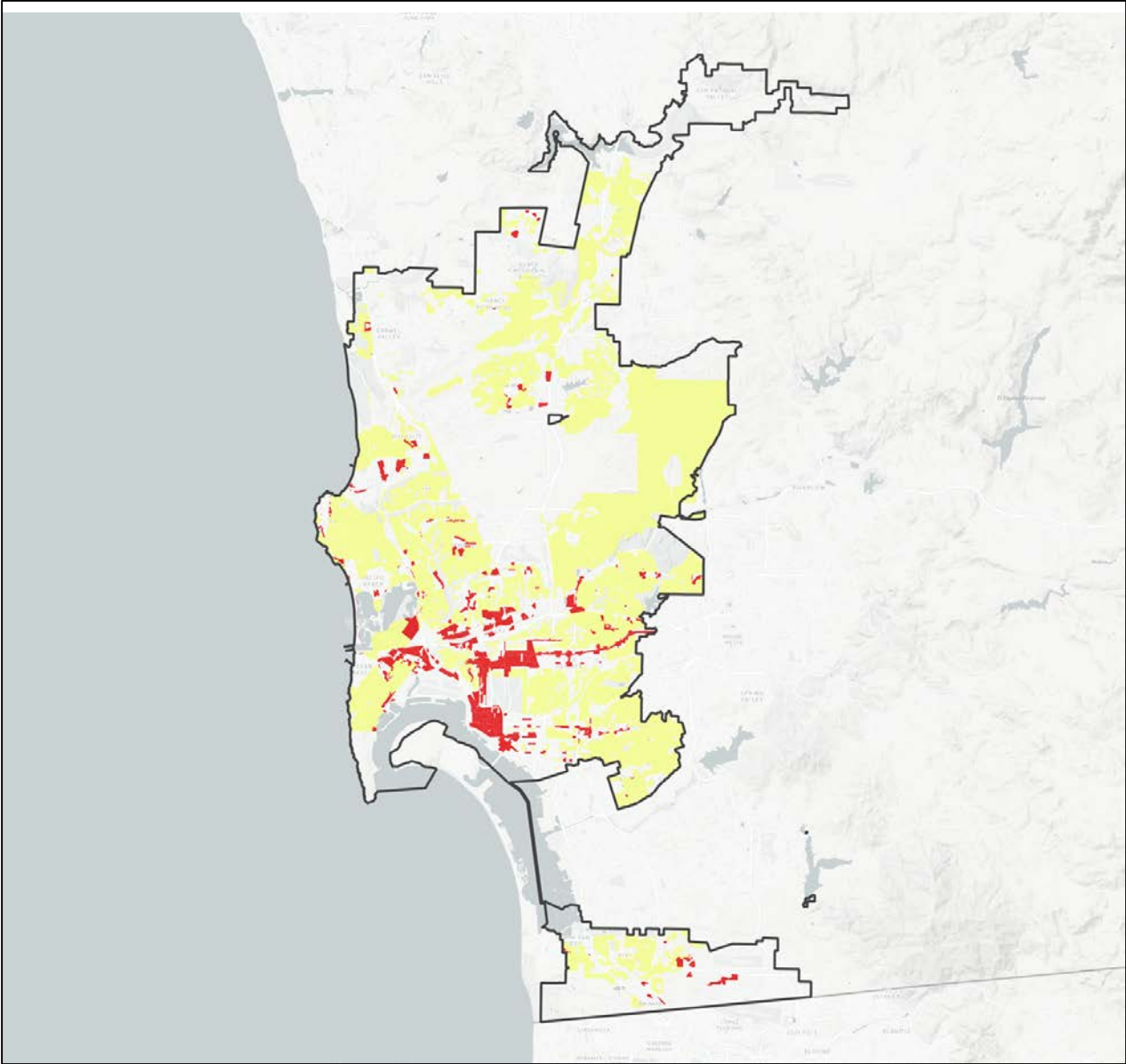
Funding for this research is
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Several cities maintain single-family zoning in Higher Opportunity HQTA

	% Highest Resource and High Resource HQTA Zoned for all income levels/All zoned land in HQTA ¹	Total land area (mi ²) HQTA High and Highest Resource All Income Levels	% Highest Resource and High Resource HQTA Zoned for Single-family Homes/All Zoned Land in HQTA	Total land area (mi ²) HQTA High and Highest Resource Single-family Zoning Only	% HQTA High Segregation & Poverty and Low Resource Zoned for All Income Levels/All Zoned Land in HQTA	Total land area (mi ²) HQTA High Segregation & Poverty and Low Resource Zoned for All Income Levels	% HQTA High Segregation & Poverty and Low Resource Zoned for Single-family	Total land area (Sq mi ²) HQTA High Segregation & Poverty and Low Resource Zoned for Single-family
Fresno	6.97%	0.59	4.14%	0.35	22.57%	1.91	16.20%	1.37
Long Beach	0.00%	0.00	17.02%	3.76	6.00%	1.32	11.79%	2.60
Los Angeles	8.66%	9.22	12.52%	13.32	13.91%	14.81	8.85%	9.42
Oakland	0.78%	0.15	2.03%	0.39	17.57%	3.34	16.43%	3.13
Pasadena	18.58%	1.16	32.16%	2.00	7.97%	0.50	10.54%	0.66
Sacramento	5.82%	1.28	11.03%	2.43	7.39%	1.63	22.98%	5.05
San Diego	3.39%	2.56	19.87%	15.00	4.95%	3.73	18.93%	14.28
San Francisco	16.15%	5.20	9.74%	3.14	8.48%	2.73	4.39%	1.41
San Jose	2.45%	0.70	5.45%	1.57	4.48%	1.29	12.43%	3.58
Santa Monica	26.60%	1.39	19.44%	1.02	_ ¹	-	-	-

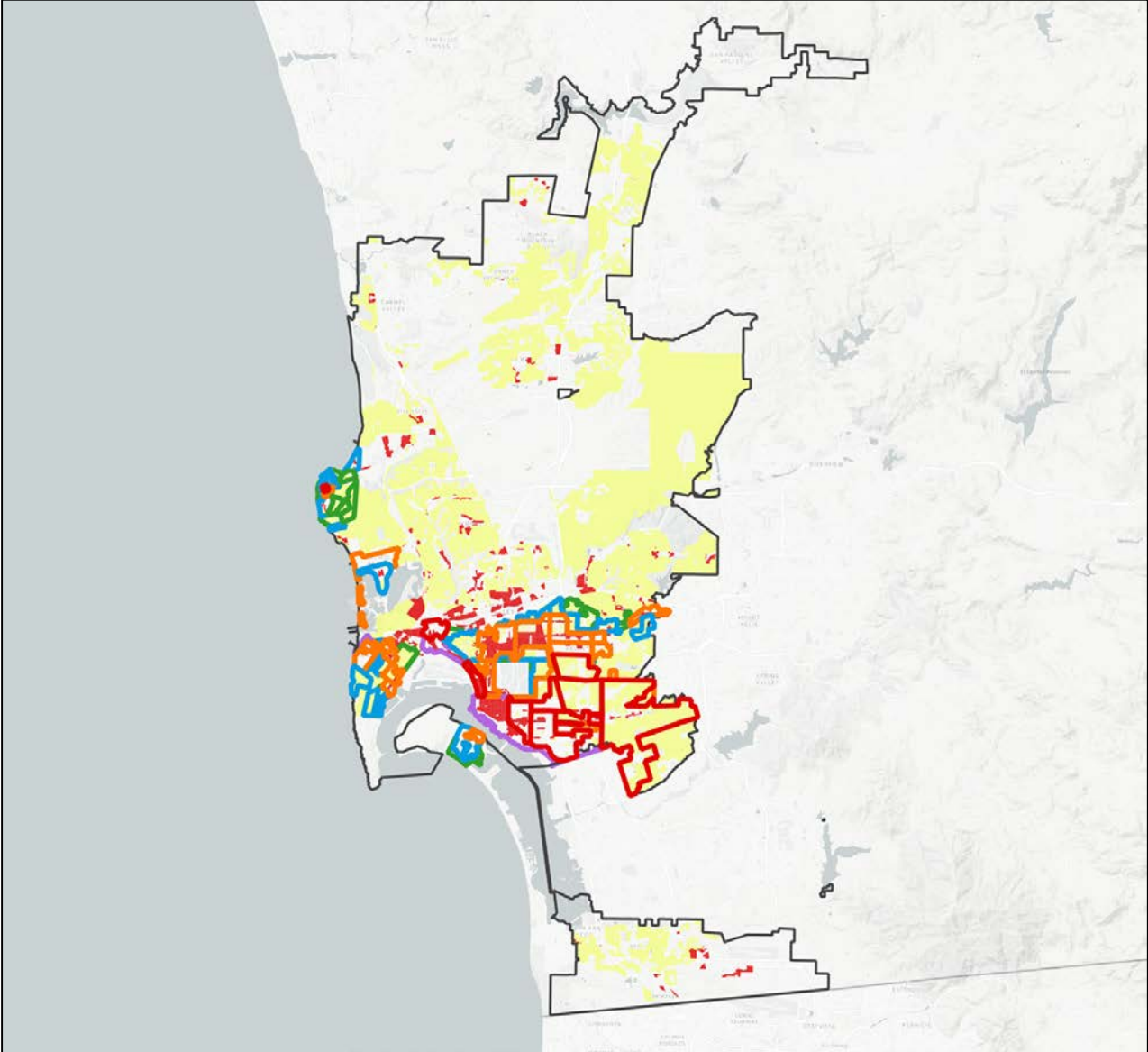
San Diego – Base Zoning Indicates Little Permissive Zoning



Density Allowed by Base Zone

- Greater than or equal to 30 du/acre
- Single Family

San Diego – Redlining and Base Zoning



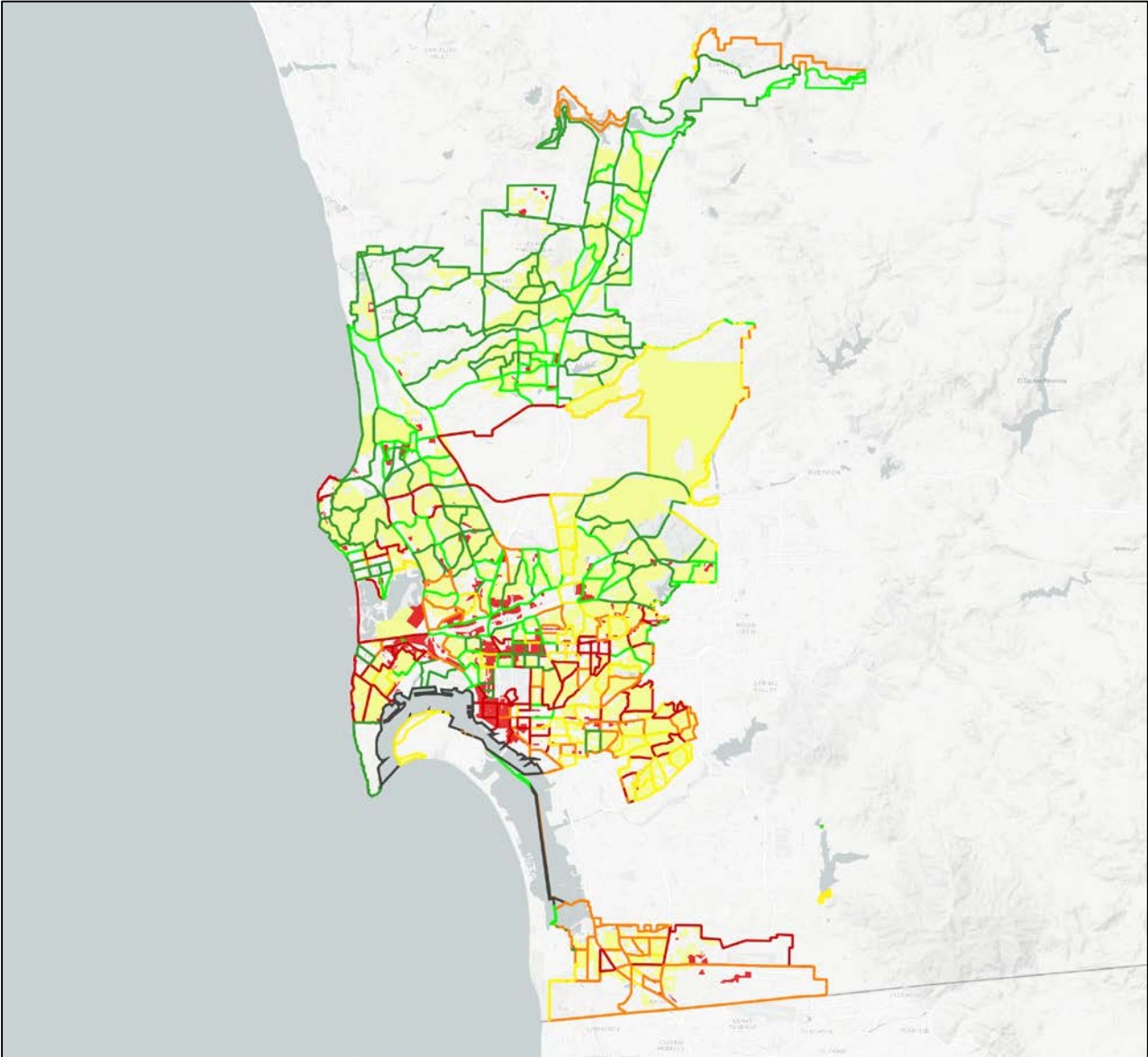
Density Allowed by Base Zone

- Greater than or equal to 30 du/acre
- Single Family



HOLC Category

- A "Best"
- B "Still Desirable"
- C "Definitely Declining"
- D "Hazardous"
- Formerly Industrial

San Diego – Opportunity and Base Zoning



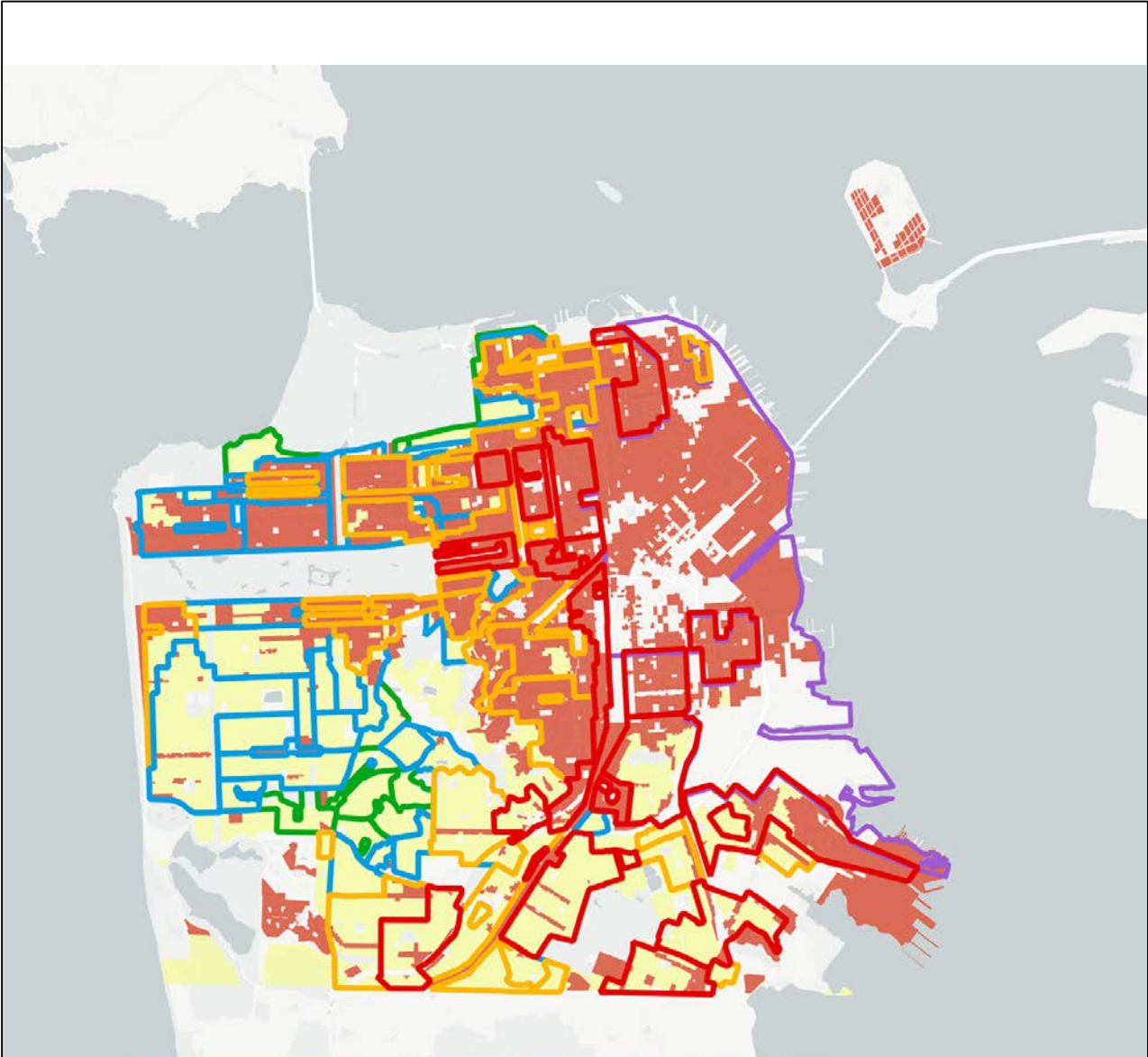
Density Allowed by Base Zone

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TCAC Category

-  Highest Resource
-  High Resource
-  Moderate Resource
-  Low Resource
-  High Segregation and Poverty
-  Uncategorized

San Francisco – Redlining and Base Zoning



Density Allowed by Base Zone

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San Francisco – Opportunity and Base Zoning



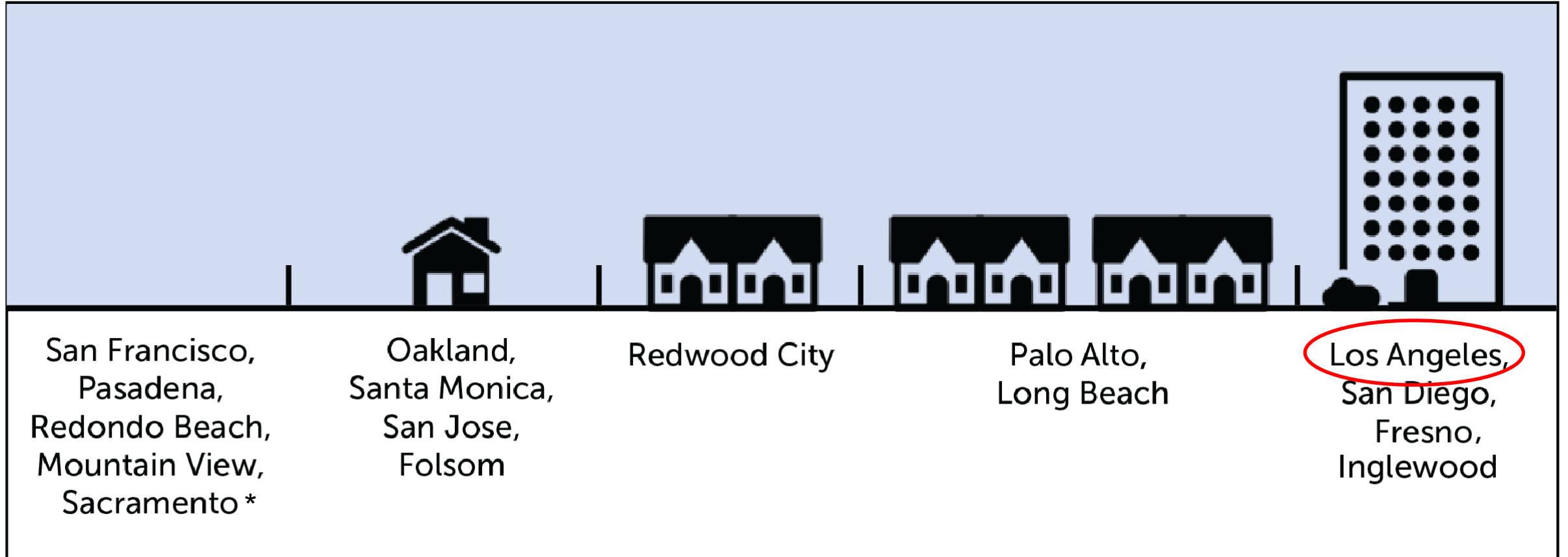
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Some cities permit dense housing “as of right,” most do not.



*Applicable to development approved between 2014-2017. Sacramento updated its ordinances to allow dense housing as of right in infill areas and has recently voted to eliminate single-family zones.

Discretionary review can slow up multi-family development that conforms to all zoning and planning designations.

Jurisdiction	Median Time Frame (Months) - All Multi-Family Development	Median Time Frame (Months) – 5-24 units	Median Time Frame (Months) – 25-49 units	Median Time Frame (Months) – 50-74 units	Median Time Frame (Months) – 75+
Fresno	3.8	2.3	7.7	1.4	7.4
Long Beach	7.3	10.9	6.6	2.9	7.4
Los Angeles	8.4	7.6	8.6	8.3	10.2
Mountain View	13.6	16.1	-	12.4	10.8
Oakland	5.4	4.4	8.0	10.5	5.5
Pasadena	14.4	14.4	19.5	17.5	-
Redwood City	10.5	19.6	-	0.0	5.9
Sacramento	5.7	5.7	-	5.5	6.2
San Diego	12.5	11.8	17.1	13.5	14.2
San Francisco	25.0	24.9	26.1	24.4	19.2
San Jose	12.1	11.0	11.0	0.0	13.6
Santa Monica	16.5	14.0	16.5	12.3	46.6

San Francisco offers more land area for dense development, but most deed-restricted affordable units go into lower opportunity areas which may not promote fair housing goals.