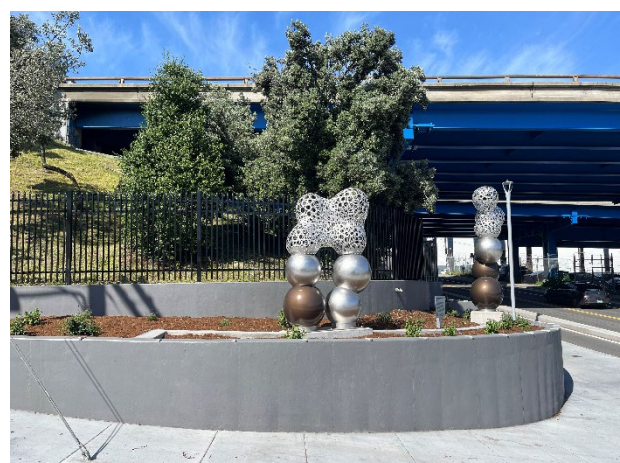


INTERAGENCY PLAN IMPLEMENTATION COMMITTEE

2026 ANNUAL REPORT



San Francisco
Planning

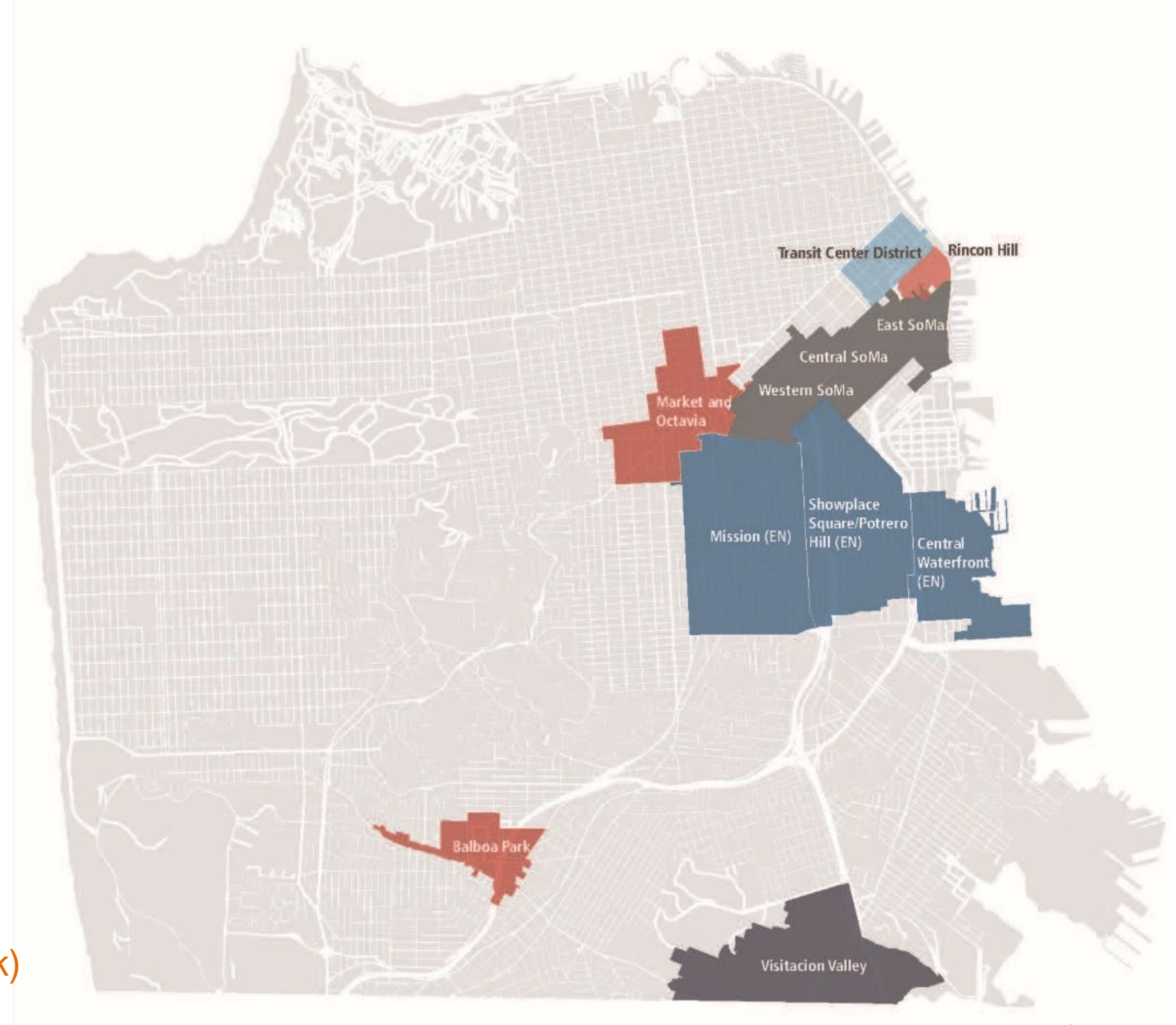
Capital Planning Committee
February 9, 2026

Presentation Overview

- Fee Revenue
- What's Changed
- New Approach
- Updates
- Closing

Plan Area Geographies

- Transit Center District
- Rincon Hill
- South of Market
(East SoMa, Central SoMa, Western SoMa)
- Eastern Neighborhoods
(Mission, Showplace Square, Central Waterfront)
- Market Octavia
- Balboa Park
- Visitation Valley
(Sunnydale HOPESF, Schlage Lock, Executive Park)



Funding Categories



Transit / Transportation



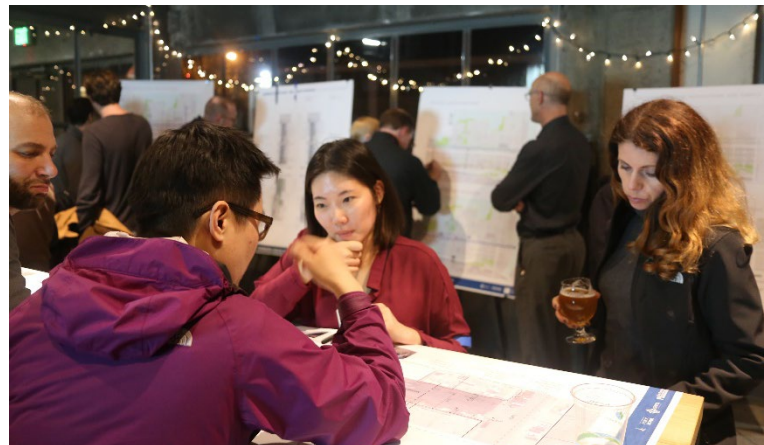
Complete Streets



Recreation and Open Space



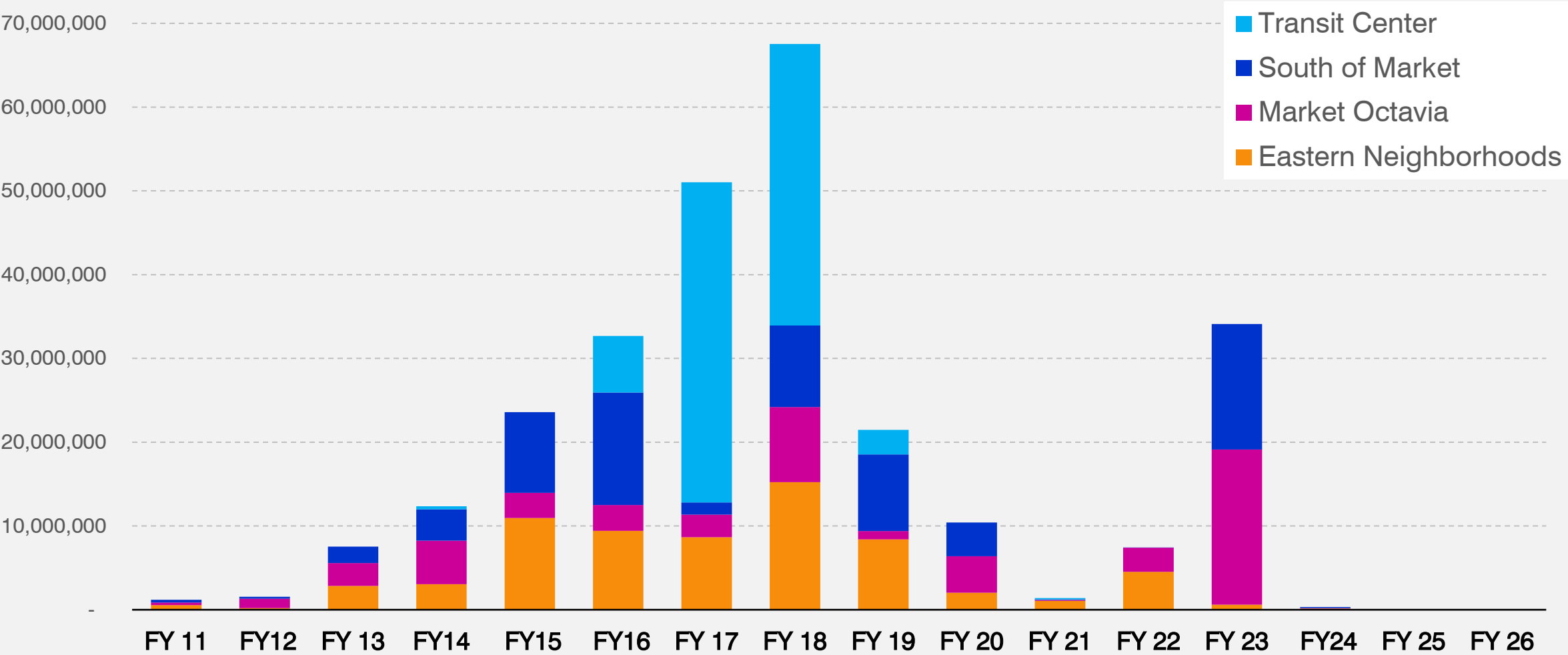
Child Care



Administration

Total Impact Fees Collected

Total Fee Revenue: \$311M



Impact Fees Contribute to Projects in Different Ways

In Chan Kaajal Park

Foundational Funding: \$3.6M / \$7.2M



Polk Street Bike Lane

Gap Funding: \$50K / \$8.2M



SoMa BUF Nursery

Sharing of Admin Funds



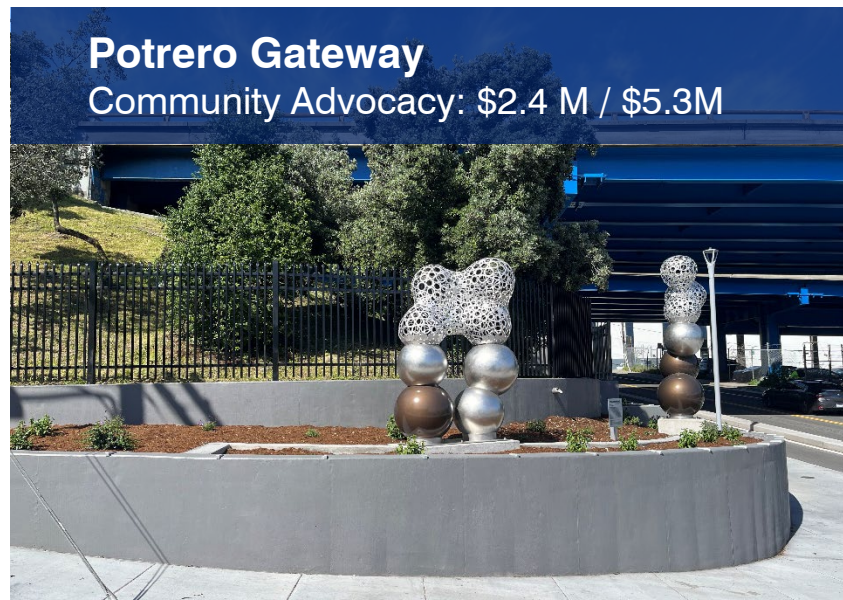
Margaret Hayward Park

Major Funding Source: \$7.9M / \$27.7M



Potrero Gateway

Community Advocacy: \$2.4 M / \$5.3M



Daggett Park

In-Kind Agreement: \$2.37 M / \$4.9M



New Legislation and Effects on Fee Revenue

- **Fee Reduction and Deferral Program (2023)**

Fixes fee rates at entitlement, reduces fees by 33%, enables Project Sponsors to defer fees until construction

- **SB 937 (2025)**

Requires City to wait for the completion of construction to collect fees from housing projects

- **Central SoMa and Transit Center Commercial Development Requirements (2025)**

Removes commercial development ratio requirements, confirms ability of projects to receive in-kind credit for required off-site improvements

- **Market + Octavia Impact Fee Waivers (2025)**

Legislation sunset all Market + Octavia area plan impact fees for pipeline projects

- **Sunset of Market Octavia CAC (2025)**

Final meeting held December 2025

New Approach to Fee Projections

- **Little revenue expected in the near term**

Because development projects now pay impact fees at the end of construction – and very little is under construction – we don't anticipate any meaningful fee revenue for the next three to five year.

- **Forgoing year-to-year projections and budgeting**

As such, we are not providing year-to-year projections and corresponding budgeting for the next five years.

- **Fee projections represent the entire all Development Pipeline**

For now, total potential revenue is represented by the Development Pipeline in total and not separated out by project size or status.

- **Year-to-year projections and budgeting will commence when development commences**

Project revenue on a year-to-year basis based on size of a project and its construction status

New Approach to Fee Projections

- Identify **total fee revenue** from all development projects in the pipelines
 - Prioritize funding for projects that have **previous commitments** (projects that have previous budget appropriations)
 - Look to see what is left (or shortfall)
- Program what is left into **general purpose categories** for now without attributing the programming to a specific project or year
 - Work with agencies to identify projects for funding when funding becomes “more real”

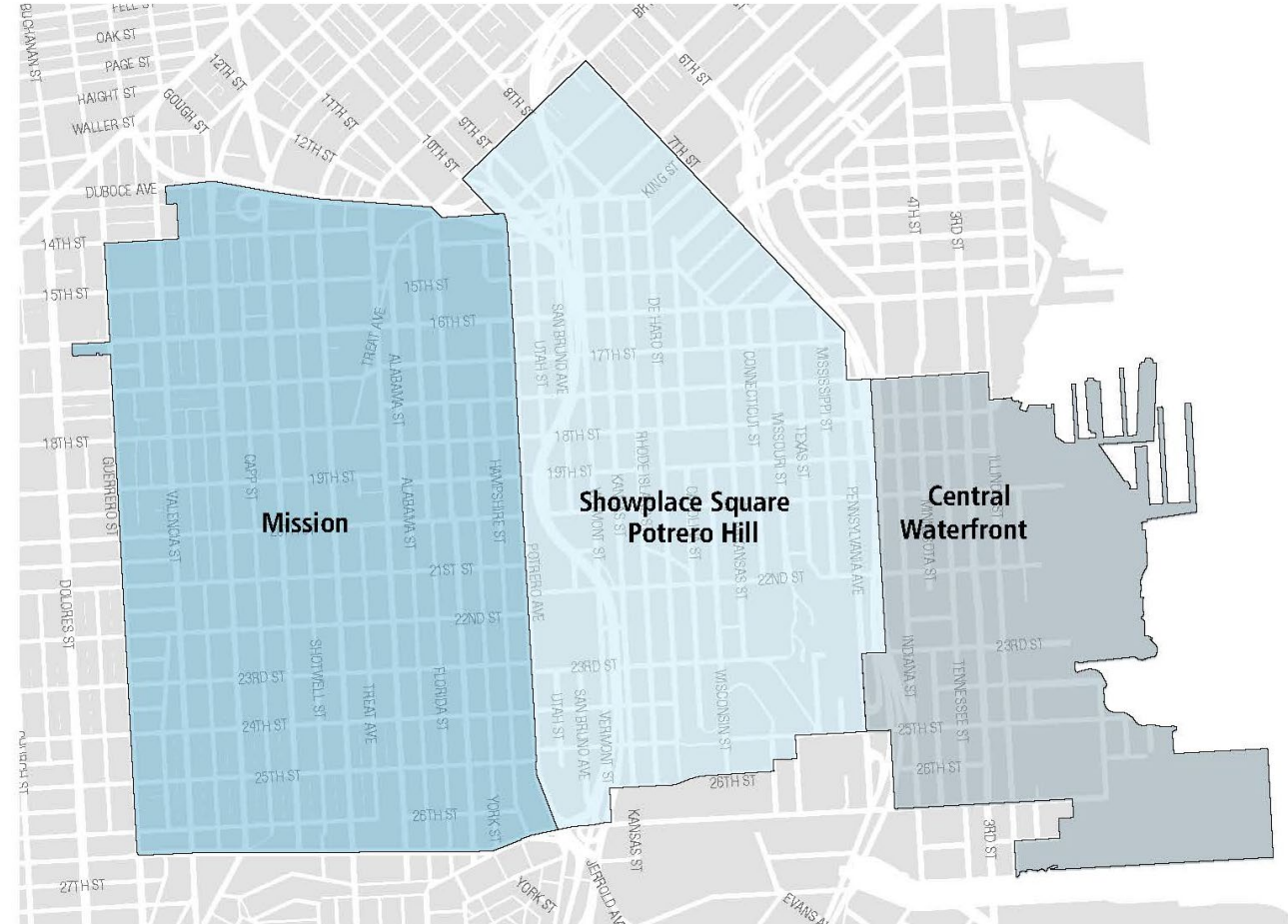
Eastern Neighborhoods **Summary**

Projected Revenue: \$31,897,000

- **Previous Commitments: \$7,408,000**
including but not limited to Jackson Park, Mission Recreation Center and Mission Street Trees
- **Future Programmed Funds: \$24,491,000**

Challenges:

- Jackson Park implementation continues to be pushed out because of delayed impact fee revenue



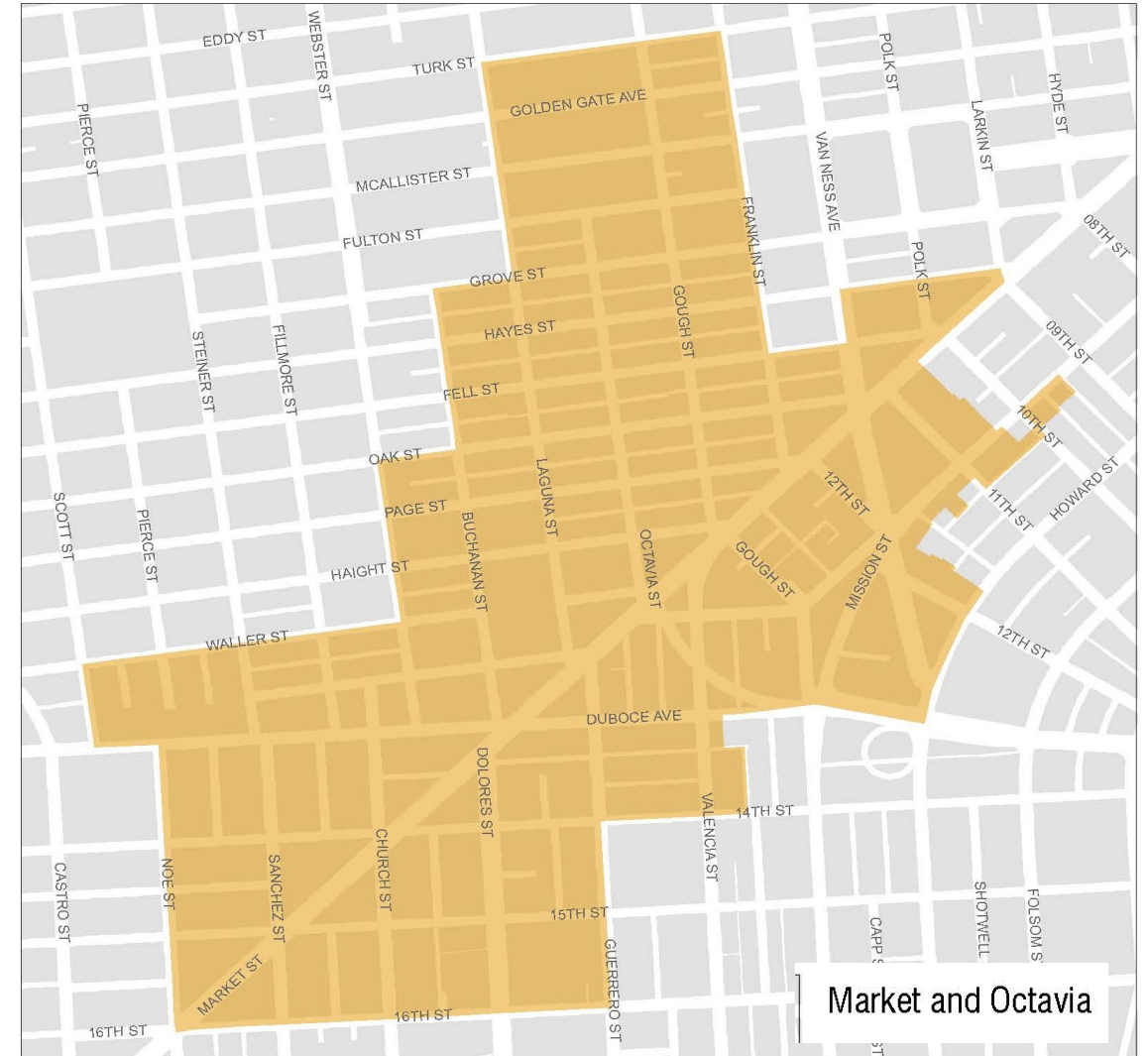
Market Octavia Summary

Projected Revenue: \$980,000

- Previous Commitments: **\$28,303,632**
including but not limited to Living Alleys, 13th Street, Rachelle Sullivan Park (new park at 11th and Natoma)
- Future Programmed Funds: **\$0**

Challenges:

- Current significant shortfall given impact fee waivers in place for pipeline projects.
- Popular ongoing programs cannot move forward without replacement funding such as **Living Alleys** and **Patricia's Green Rotating Art**.



South of Market **Summary**

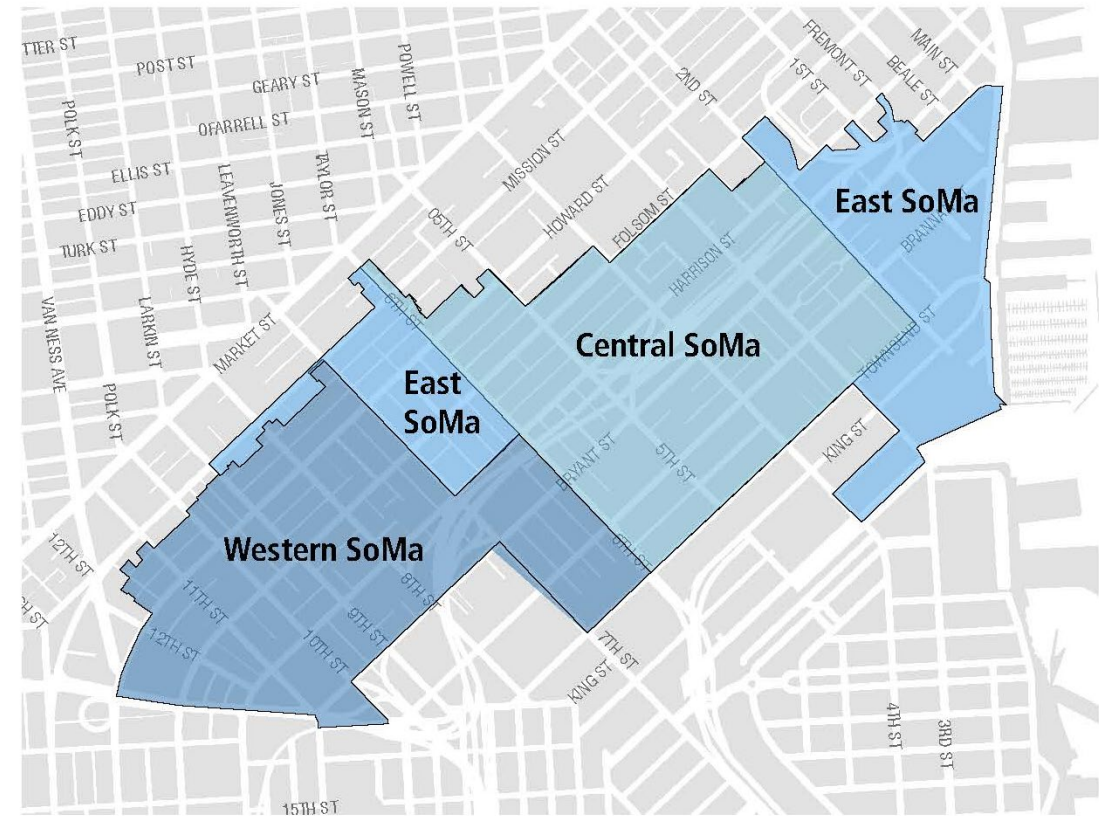
PROJECTED REVENUE:

| | |
|-------------------------|----------------------|
| Impact Fee | \$193,494,000 |
| CFD (for City Projects) | \$239,279,000 |
| Total | \$432,773,000 |

- Previous commitments: **\$32,531,750**
including but not limited to Folsom / Howard, Gene Friend Recreation Center, Rachelle Sullivan Park
- Future Programmed Funds: **\$400,242,000**
largely in general purpose line items for now

Challenges:

- Development pipeline is very fluid, it is hard to predict revenue
- Funding needed in the near term for Rachelle Sullivan, Howard Street
- Will need to be ready to spend the potentially large sum of funds:
Example: approx. \$100M to Regional Transit Project



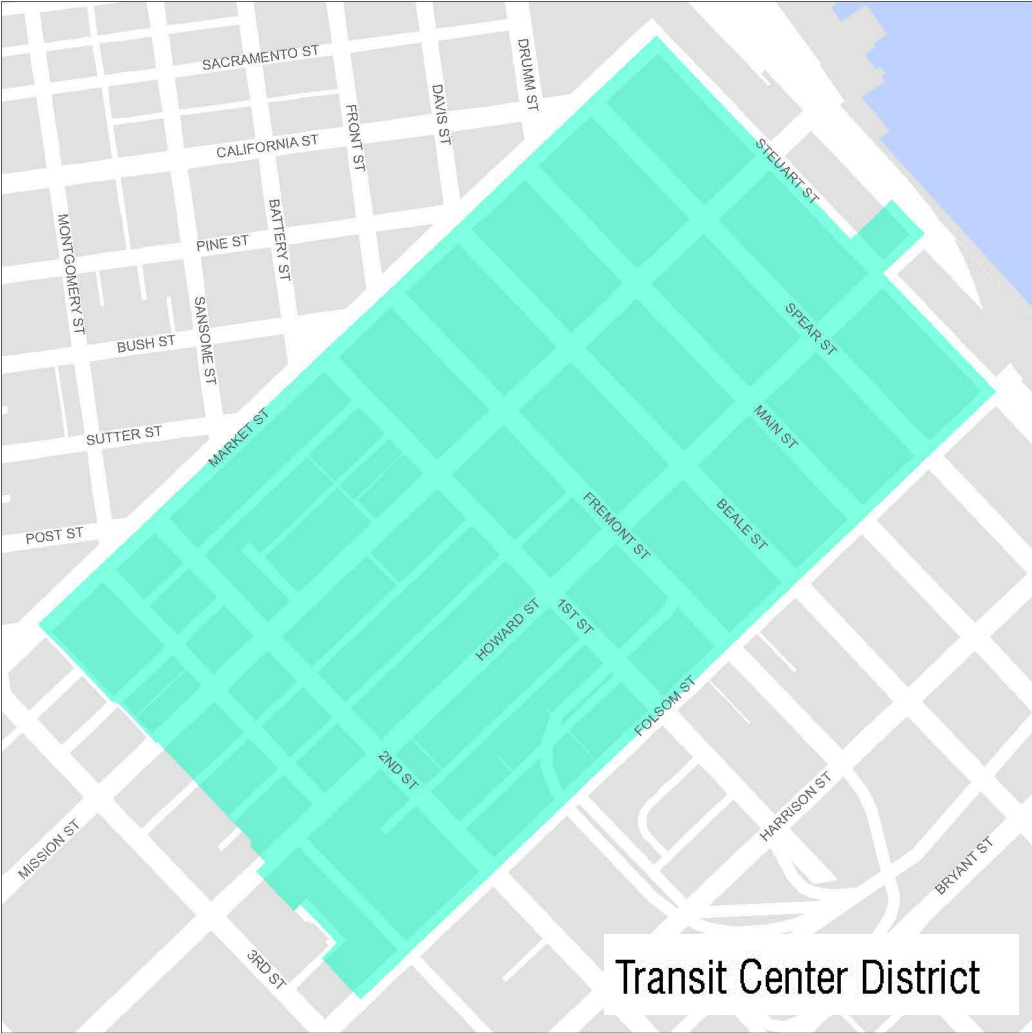
Transit Center **Summary**

| PROJECTED REVENUE: | Low Scenario | High Scenario |
|-------------------------|---------------|---------------|
| Impact Fee | \$61,190,165 | \$107,167,789 |
| CFD (for City Projects) | \$57,092,173 | \$77,175,739 |
| Total | \$118,282,338 | \$184,343,529 |

- Previous commitments: **\$32,000,000**
Transit Center Streetscape, The Portal, Bart Capacity Project
- Future Programmed Projects: **\$86,258,000** (low scenario)
\$152,319,000 (high scenario)
Largely in general purpose Streetscape and Recreation and Open Space line items

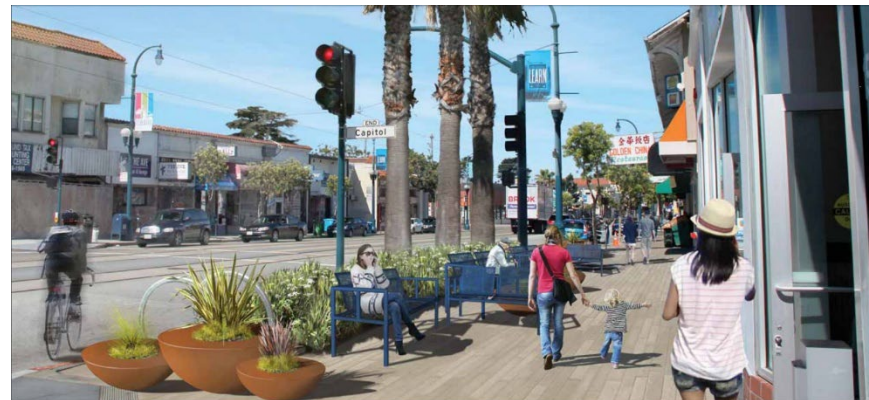
Challenges:

- Development Pipeline is very fluid, it is hard to predict revenue
- Funding timing mismatch, current projects need funding when funds are not available.



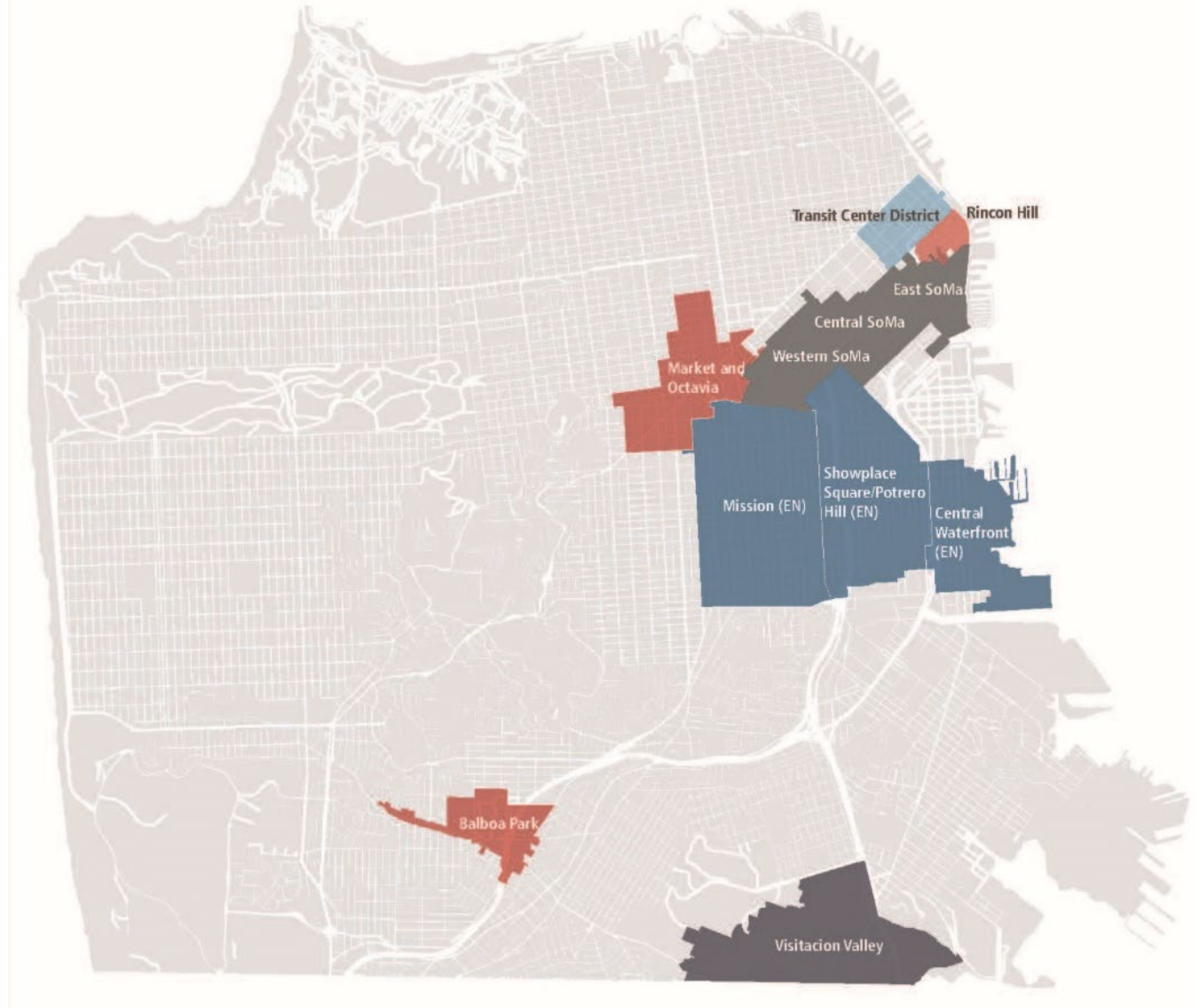
Other Plan Areas **Summary**

| Area Plan | Projected Revenue | Previous Commitments | Deficit |
|--------------------------|-------------------|----------------------|--------------|
| Rincon Hill | \$1,538,267 | \$8,998,000 | -\$7,459,733 |
| Balboa Park | \$0 | \$236,000 | -\$236,000 |
| Visitation Valley | \$6,094,000 | \$10,740,000 | -\$4,646,000 |



Interagency Plan Implementation Committee **This Coming Year**

- Continue to work on **Projections Dashboard** – connected directly to the Development Pipeline Report and is made further available to agencies.
- Depending on outcome of Proposition E Taskforce, **reconstitute IPIC** as an agency working group.
- Look forward to seeing development **projects under construction**.





THANK YOU



San Francisco
Planning

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