

CALES

Comprehensive Assessment
of Land Use Entitlements

**What does development data tell us about how cities
process and approve housing?**

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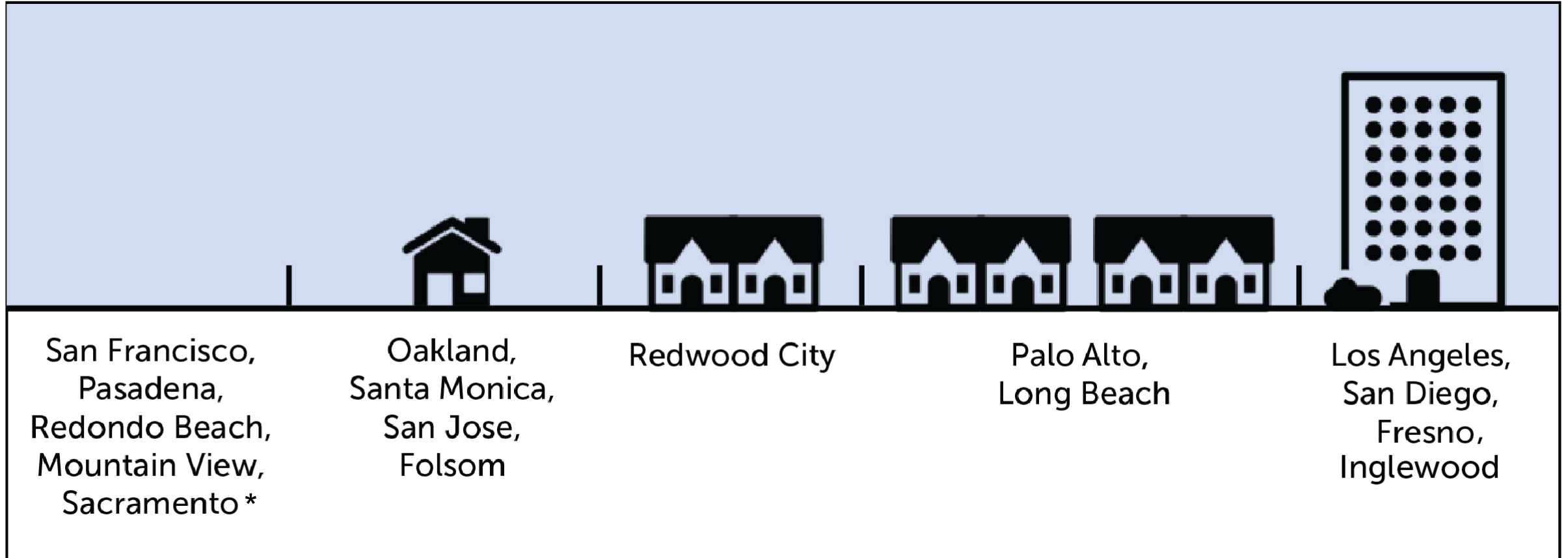
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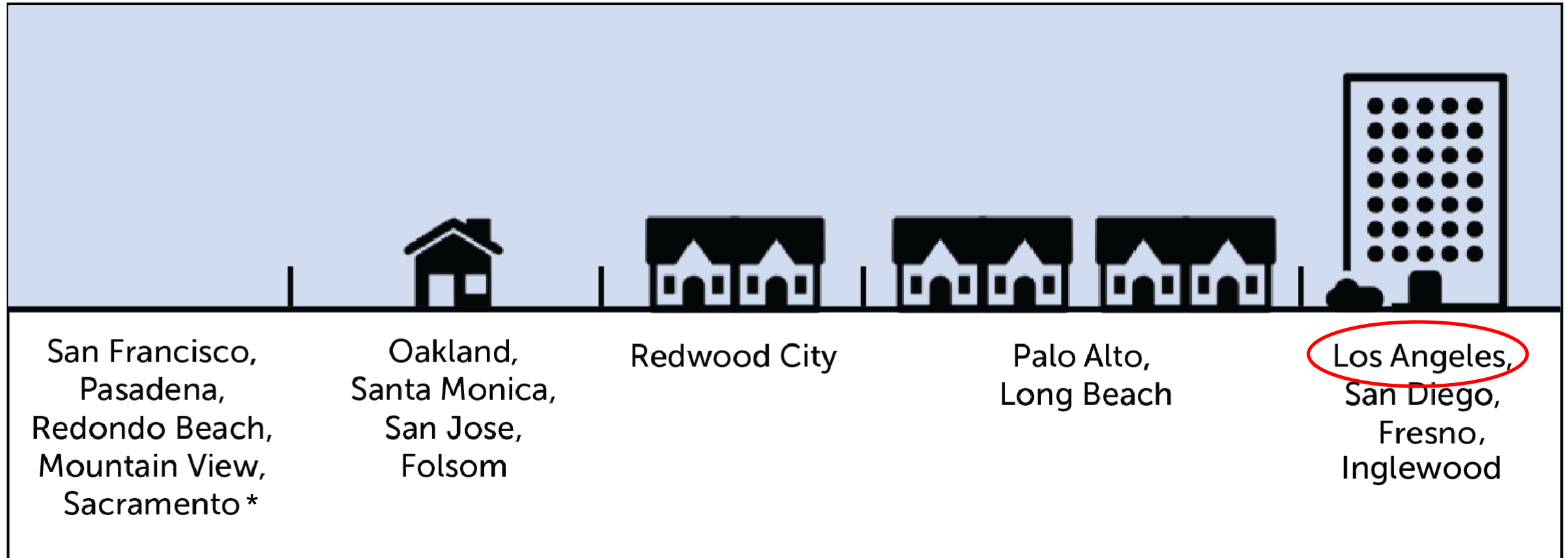


Some CALES cities permit dense housing “as of right,” most do not.



*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.

Data can highlight that an “as of right” process may not be applied.



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How much land is zoned for all income levels within cities?

	% Citywide Zoned for all income levels	Land Area (mi ²) available for all income levels	% High Quality Transit Area (HQTa) available for all income levels	% HQTa for Single Family Only	HQTa Land Area for all income levels (mi ²)
Fresno	9.96%	9.29	33.47%	25.0%	2.83
Long Beach	4.34%	1.73	7.02%	34.6%	1.55
Los Angeles	11.21%	45.56	28.5%%	26.7%	30.33
Mountain View	9.26%	0.96	24.61%	22.0%	0.85
Oakland	6.16%	4.12	19.93%	27.1%	3.79
Palo Alto *	3.53%	0.8	21.49%	36.2%	0.45
Pasadena	12.39%	2.28	29.01%	33.3%	1.81
Redondo Beach	3.3%	0.16	-	-	
Redwood City	12.81%	1.11	49.41%	11.4%	0.50
Roseville	1.96%	0.10	6.64%	40.7%	0.10
Sacramento	9.21%	7.65	15.67%	43.8%	3.45
San Diego	3.19%	8.7	9.24%	45.8%	6.97
San Francisco	33.54%	11.66	34.89%	25.2%	11.24
San Jose	4.03%	6.13	15.11%	33.7%	4.35
Santa Monica	17.72%	1.06	19.66%	26.6%	1.03

How long does it take for development to get entitled, generally?

Jurisdiction	Median Time to Entitlement (Months)	Steps to Entitlement	Total Approved (2014-2017)
Folsom	14.1	4.3	6
Fresno	6.5	3.5	64
Long Beach	7.6	3.2	27
Los Angeles	9.7	2.5	1081
Mountain View	13.0	4.9	33
Oakland	5.4	3.5	136
Palo Alto	14.1	3.7	7
Pasadena	9.9	3.3	38
Redondo Beach	2.2	5	7
Redwood City	7.5	4.6	18
Sacramento	6.4	4.3	68
San Diego	13.9	3.8	177
San Francisco	26.6	3.4	140
San Jose	17.7	3.7	81
Santa Monica	16.5	3.3	21

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

Although discretionary review requires development undergo environmental review under the California Environmental Quality Act—EIRs are not common

	San Francisco		Los Angeles		San Jose		San Diego	
CEQA Pathway ¹	% of Projects	Median Timeframe	% of Projects	Median Timeframe ²	% of Projects	Median Timeframe	% of Projects ³	Median Timeframe
Exemption	8.57%	22.47	32.34%	7.26	7.22%	15.48	30.30%	11.54
ND	1.43%	40.55	.25%	3.45	-	-	2.02%	20.73
Tiering	71.43%	26.10	1.64%	6.67	1.20%	9.00	22.22%	14.71
Addendum	1.43%	20.50	1.51%	6.43	33.73%	12.56	8.08%	12.67
MND	6.43%	33.20	60.45%	10.75	33.73%	25.69	23.23%	17.09
EIR	8.57%	40.94	2.90%	22.75	13.25%	29.91	9.09%	22.58
Multiple Pathways	1.43%	-	1.00%	-	10.84%	-	2.02%	-
CEQA Unknown	.71%	-	0.00%	-	0.00%	-	3.03%	-

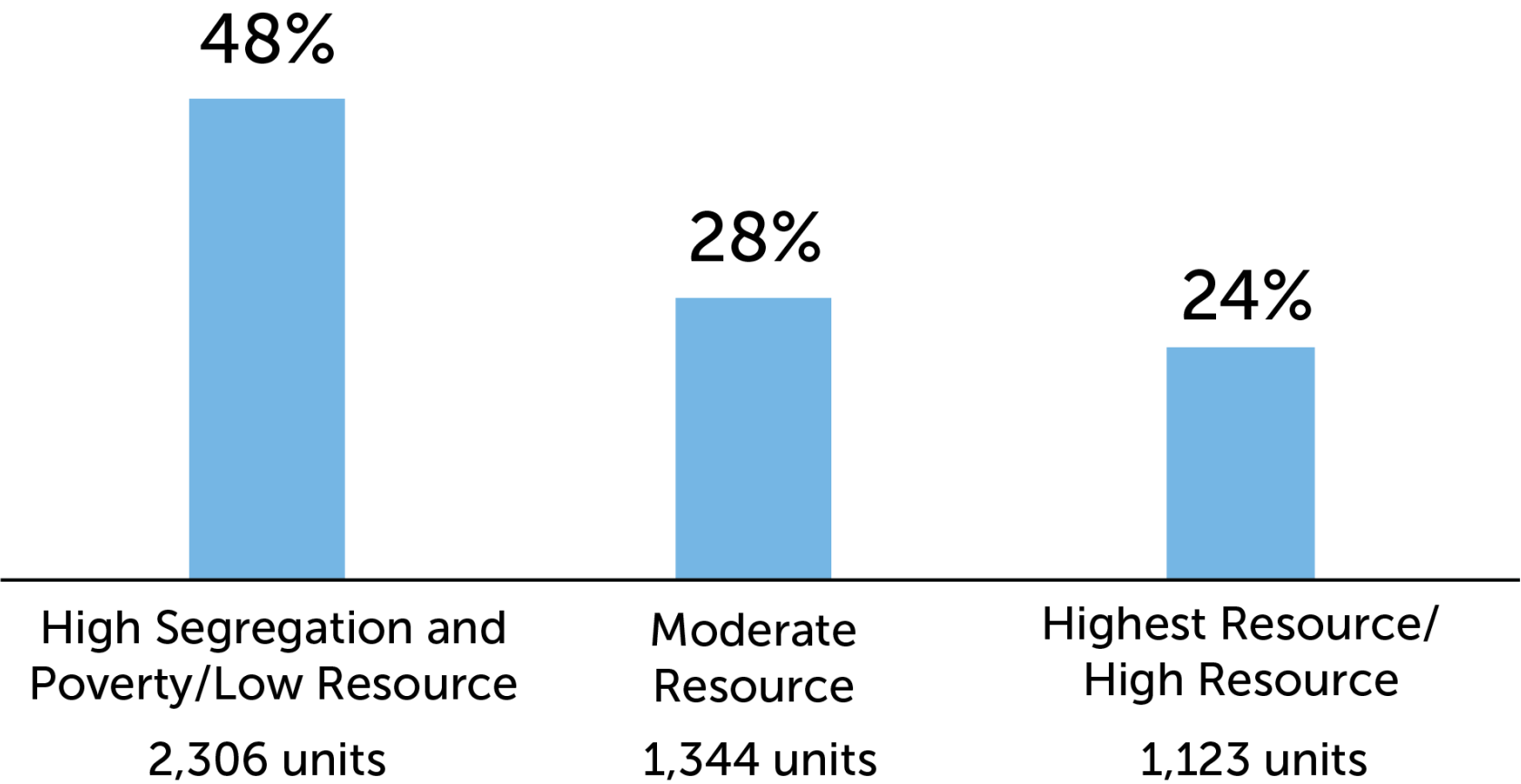
Discretionary review requires state mandated environmental review, but that is not likely the true driver of longer approval processes, either.

Jurisdiction	Median Timeframe (Months) to Entitlement for Development that receives a Community Plan Exemption (CPE)	Median Timeframe (Months) to Entitlement for Development that requires an Environmental Impact Report
San Francisco	26.1	41.1
Redwood City	14.0	106.6
Oakland	5.4	9.9
Los Angeles	**	22.7
San Diego	**	22.6
San Jose	**	20.5

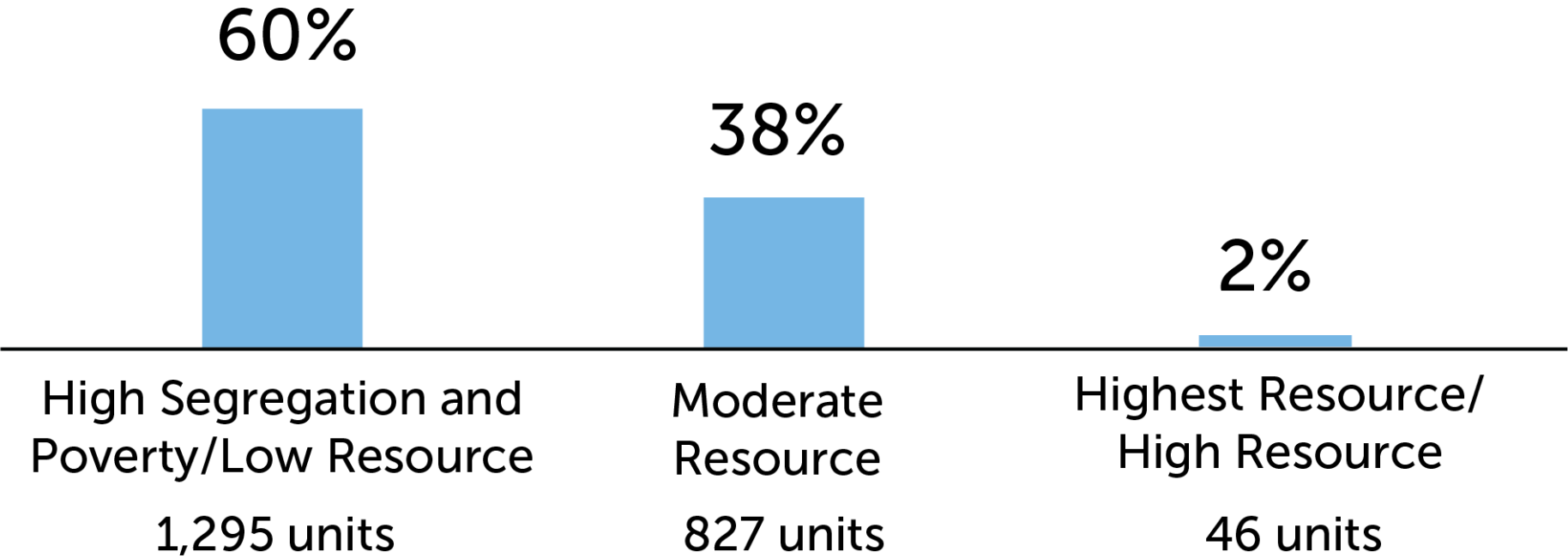
How helpful is state law requiring cities approve development faster? There is too little or no data to answer this question.

Jurisdiction	Number of entitlement observations with determined to be complete dates	Percentage of entitlement observations with determined to be complete dates
Folsom	0	0%
Fresno	33	52%
Inglewood	0	0%
Long Beach	0	0%
Los Angeles	782	99%
Mountain View	0	0%
Oakland	89	65%
Palo Alto	3	43%
Pasadena	2	5%
Redondo Beach	0	0%
Redwood City	0	0%
Sacramento	0	0%
San Diego	89	51%
San Francisco	0	0%
San Jose	0	0%
Santa Monica	3	14%

Distribution of all entitled/permitted deed-restricted affordable units across TCAC Areas in Los Angeles



Distribution of all entitled/permitted deed-restricted affordable units across TCAC Areas in San Francisco



Ministerial processes in Los Angeles might make it easier to develop multi-family units in Higher Opportunity Areas.

	High Resource + Highest Resource	Moderate Resource	Low Resource + High Segregation and Poverty
Ministerial	38.0%	28.4%	33.0%
Discretionary	25.5%	28.5%	45.9%