

SAN MATEO COUNTY DRAFT HOUSING ELEMENT 2023-2031 SUMMARY: SITES INVENTORY AND RHNA

A key component of the Housing Element is the identification of sufficient development capacity to meet the County’s housing need over the 8 years of the Housing Element planning period (2023-2031). State law requires that every jurisdiction’s Housing Element demonstrate that the jurisdiction has sufficient appropriately zoned developable or redevelopable land to accommodate the jurisdiction’s share of regional housing need, as determined by the California Department of Housing and Community Development (HCD) and the local Council of Governments (COG). In the Bay Area, the COG is the Association of Bay Area Governments (ABAG), which estimates housing need for the region, and apportions a share of projected need to every jurisdiction; a jurisdiction’s individual share of housing need is its Regional Housing Needs Allocation, or RHNA. The RHNA includes both total projected residential units needed to meet demand over the next 8 years, and a breakdown of housing units needed by income level.

The County’s RHNA is 2,833 housing units in total, with 811 units for very low-income households, 468 for low-income households, 433 for moderate-income households, and the remainder for above moderate-income households.

San Mateo County RHNA, 2022 - 2031

Income Category	% of County Area Median Income (AMI)	Units	% of Units
Very Low	0-50%	811	29%
Low	51-80%	468	17%
Moderate	81-120%	433	15%
Above Moderate	120% +	1,121	40%
Total		2,833	100%

The assessment of developable and redevelopable sites, and pipeline projects already underway, can be viewed through the [2023-2031 Housing Element Update Adequate Sites Inventory Explorer](#), an interactive web mapping tool that allows exploration of all the sites in the Inventory, mapped and depicted with location and characteristics.

The County’s ability to meet its RHNA over the next 8 years comes from the following sources:

- Vacant, developable single-family residentially zoned sites
- Vacant, multifamily residentially zoned sites
- Non-vacant, redevelopable multifamily sites

- Pipeline projects significantly advanced in the approval and/or development process, but not yet completed
- Projected development of Accessory Dwelling Units
- Projected development of units pursuant to SB 9, a new state law that allows low-density multifamily development of single-family zoned parcels

The full Adequate Sites Inventory and methodology will be presented in the draft updated Housing Element, and will include a detailed inventory and description of developable and redevelopable sites, and a description of methodology for assessing site developability, affordability, and projections of future development.

The number of units attributable to each category is shown below.

Vacant and Non-Vacant Developable and Redevelopable Sites

Sites Inventory: Total Sites and Units by Income Category, Vacant and Non-Vacant Sites

Income Category	Vacant Single-Family Residential	Vacant Multifamily Residential	Non-Vacant Multifamily Residential
Very Low	0	42	381
Low	0	33	144
Moderate	0	34	214
Above Moderate	676	141	645
Total Units	676	250	1,384
Total Sites	676	19	69

Recent Projects and Pipeline Projects

The following tables show recently completed projects, which help identify development trends, feasibility of development, and other indications of what types of development are possible on various types of sites, and pipeline projects, which are already approved, entitled, or significantly advanced in the permitting and development process, but which have not yet been completed, and which count against the County’s 2023-2031 RHNA.

Recently Completed Multifamily Projects, Unincorporated San Mateo County

Project Name	Project Location		APN	General Plan Land Use	Zoning	Parcel Size (Acres)	Density (unit/acre)	Project Description	Total Units	Affordable Units
Sunrise Center	1 Selby Lane (2915 El Camino Real)	North Fair Oaks	060271120	Commercial Mixed-Use	NMU-ECR	1.40	64.46	90 unit 2- and 3-story residential care facility, 63 parking spaces	90	0
St Leo's	97 Nottingham	North Fair Oaks	054263150	Medium High Density Residential	R-3/S-5	0.29	52.00	15 units, 3-story, 100% affordable	15	9
Fair Oaks Commons	2821 El Camino Real	North Fair Oaks	054284360	Commercial Mixed-Use	CMU-1	0.60	110.85	67 unit 100% affordable, 4 stories, 52 parking spaces	67	67
Waverly Place	105 5th Avenue	North Fair Oaks	060265150	Commercial Mixed-Use	PUD-137	0.41	38.77	16 unit formerly homeless/mental health assisted living facility	16	16
F Street	300 F Street	Colma	081411100	High Density Residential	PC	0.98	32.80	4 separate condo buildings, 32 units total	32	0
Mavericks Apartments	101 Avenue Portola	El Granada	047206230	High Density Residential	R-3/S-3	0.39	30.64	12 unit rental multifamily, 4 ADA units, 1 inclusionary low-income unit	12	1
N/A	1811 Woodside Road	Redwood City	069261440	High Density Residential	R-3/S-3	0.33	33.48	11-unit multifamily rental, 1 ADA unit, 1 inclusionary low-income unit	11	1
N/A	195 Avenue Cabrillo	El Granada	047271200	High Density Residential	R-3/S-3	0.25	36.61	3-story, 9-unit condominium multifamily, 1 inclusionary low-income unit	9	1

Pipeline Projects

Proposed Units by Income Level

Address	APN	Community	Very Low Income	Low Income	Moderate Income	Above Moderate Income	Total	Project Description	Project Status
2700 Middlefield Road	054113140	North Fair Oaks	103	76	-	-	179	Two buildings, one 5-story, one 6-story, 179 - unit affordable units w/ childcare and community facilities; SB 35 project w/ State funding and dedication of County-owned land	Entitled
2385 Carlos Street	037097200	Moss Beach	-	1	-	7	8	Three building, 8-unit multifamily w/ one affordable unit, 16 parking spaces	PUD project consistent with approved PUD site-specific standards; Planning approvals complete
3051 Edison Way	060041080	North Fair Oaks	59	20	1	-	79	5-story, 79-unit 100% affordable housing, 28 parking spaces; SB 35 project	Entitled
2857 El Camino Real	054284220	North Fair Oaks	-	1	-	8	9	9 unit all residential, 1 affordable inclusionary unit	In agency review
396 3rd Avenue	060083360	North Fair Oaks	-	-	1	6	7	11,865 sq/ft, 4-story mixed-use building with 7 residential units (1 inclusionary affordable), 900 sq/ft of retail space & 10 parking spaces	Entitled

Address	APN	Community	Very Low Income	Low Income	Moderate Income	Above Moderate Income	Total	Project Description	Project Status
2875 El Camino Real	054284200	North Fair Oaks	0	0	0	4	4	Residential mixed-use with 4 residential units, no affordable units	Planning approvals, geotechnical approvals, public works approvals, and building department approvals complete; awaiting building permit issuance
1993 Carlos Street	037022070	Moss Beach	35	35	0	1	71	100% affordable project on site of previously-approved 100% affordable project, revised to lower densities	Rezoning, GP amendment, and LCP amendment complete and approved by PC, BOS, and Coastal Commission to allow lower density than prior approval; Coastal Development Permit in process
2949 Edison Way	060041110	North Fair Oaks	16	17	41	95	169	7-story, 169-unit multifamily residential, Density Bonus project	Building, geotechnical, and public works approvals, now in building permit review; pursuant to new zoning and Density Bonus criteria, remaining approvals are ministerial except grading permit issuance
3017 Middlefield Road	060053100	North Fair Oaks	42	43	0	0	85	85 unit 5-story 100% senior affordable over 1 story of parking and retail; SB 35 and Density Bonus project; LIHTC funded	Awarded tax credit allocation; planning approvals complete

Address	APN	Community	Very Low Income	Low Income	Moderate Income	Above Moderate Income	Total	Project Description	Project Status
434 Macarthur Ave	054232090	North Fair Oaks	49	49	1	1	99	86 units, 100% dedicated affordable	Entitled
206 Sequoia	069341050	Redwood City	0	3	0	20	23	23-unit Density Bonus project with 3 affordable units	Rezoning and General Plan amendment approved; in plan and subdivision review; Density Bonus project, affordable units are 20% of 15 allowed prior to density bonus, per inclusionary ordinance
1301 Woodside Road	069311350	Redwood City	0	1	0	5	6	Six three-story townhomes, one low-income unit	Major subdivision, General Plan amendment, Zoning amendment, and lot merger complete; Planning approvals complete, grading permit issued
Totals:			303	246	44	147	739		

Recent ADU Development

The County has amended its ADU regulations multiple times, beginning in 2017, to streamline and facilitate production of ADUs. The past several years show significant increase in ADU production since amendment of the regulations.

Recent ADU Production by Year

Year	ADUs
2012	8
2013	6
2014	13
2015	6
2016	10
2017	14
2018	31
2019	34
2020	31
2021	43
Total	196

Source: San Mateo County Permitting Database

Projected ADU Development

Based on recent development trends, ADUs production is predicted to continue to increase modestly across the 8-year Planning Period. The affordability assumptions for ADUs, shown in the RHNA vs Development Capacity Table below, are based on actual market research by ABAG and the University of California, Berkeley.

Projected ADUs, Housing Element Period

Year	Projected ADUs
2023	35
2024	35
2025	40
2026	40
2027	45
2028	50
2029	55
2030	55
Total	355

Projected SB 9 Development

SB 9, a new state law effective as of January 2022, allows the development of up to four units on parcels normally zoned to allow no more than one single-family unit. In the first six months after the law took effect, the County received 12 SB 9 applications that would result in 18 net new units. However, projections of SB 9 development over the Planning Period.

Note that these projections are significantly below maximum potential SB 9 development, based on capacity of eligible sites. The County's assessment of potentially eligible SB 9 parcels can be seen [here](#).

Projected Units Developed Through SB 9, Housing Element Period

Year	Applications	Net New Units
2023	10	12
2024	12	14
2025	14	21
2026	16	24
2027	16	24
2028	16	24
2029	18	27
2030	20	30
Total	122	176

RHNA VS DEVELOPMENT CAPACITY

The combination of these categories, shown below, demonstrates that the County has sufficient capacity to meet its 2022-2031 RHNA, in total and by income level.

RHNA vs Development Capacity

Income Category	RHNA	Vacant SFR	Vacant MFR	Non-Vacant MFR	Pipeline (RHNA Credits)	ADUs	SB 9 Units	Total Units	Surplus/ (Deficit)
Very Low	811	0	42	381	303	107	0	834	23
Low	468	0	33	144	246	107	0	528	60
Moderate	433	0	34	214	44	107	88	482	54
Above Moderate	1,121	676	141	645	147	36	88	1,732	611
Total	2,833	676	250	1,384	740	355	176	3,581	748