OCII
office of
COMMUNITY INVESTMENT
and INFRASTRUCTURE

118-0292026-002

Agenda Item **No. 8(a)**
Meeting of May 19, 2026

INFORMATIONAL MEMORANDUM

TO: Commission on Community Investment and Infrastructure

FROM: Thor Kaslofsky, Executive Director

SUBJECT: Marketing Outcomes report for 52 Kirkwood Avenue (Block 52), nine for-sale inclusionary below market rate units affordable at 80% Area Median Income; 275 Coleman (HPSY Block 56), a 73-unit affordable multifamily rental development, affordable at 50% Area Median Income and below, including one manager's unit; 151-351 Friedell (HPSY Block 52-54), a 110-unit affordable multifamily rental development, affordable at 50% Area Median Income and below including two manager's units; Hunters Point Shipyard Project Area

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EXECUTIVE SUMMARY

The OCII Commission considered and approved a Memorandum of Understanding ("MOU") between OCII and the Mayor's Office of Housing and Community Development ("MOHCD") on May 6, 2014. The MOU provided a framework for MOHCD to provide implementation of the funding, approvals, and management of the Retained Housing Obligations, as well as the terms for transferring completed housing assets to MOHCD as the Housing Successor. Pursuant to the MOU, MOHCD will provide a Marketing Outcomes Project Report ("Project Report") after the full lease-up of each affordable project and sales of affordable housing units.

Attached are three separate Marketing Outcomes Reports; 1) for the sale of nine inclusionary units at Block 52; 2) a 73-unit affordable housing lease-up; and 3) a 112-unit affordable housing lease-up all which are located in Phase 1 of the Hunters Point Shipyard ("HPSY") Project Area.

One S. Van Ness Ave.
5th Floor
San Francisco, CA
94103

628 652 8500

www.sfocii.org

MOHCD and OCII worked with Lennar staff to complete early outreach to COP holders in the Winter of 2024, for the nine inclusionary units located at 52 Kirkwood Avenue. Three open houses and one informational session were provided to active COP holders who received postcards, and homeownership workshops were provided by the San Francisco Housing Development Corporation. The application process was held from January 4 - January 25, 2024, and the lottery was held on February 15, 2024.

For 275 Coleman, MOHCD and OCII staff had a marketing kickoff meeting with Mercy Housing and San Francisco Housing Development Corporation staff in September 2024, to review marketing materials and plan outreach activities, including sending out postcards to COP holders. The postcards provided information on the project and workshops to get ready to apply for this housing opportunity. Applications were accepted from October 24 – November 14, 2024, and the lottery was held on December 3, 2025. A total of 81 COP holders applied through the DAHLIA Housing Portal for this housing opportunity, and 20 now reside at 275 Coleman.

MOHCD and OCII staff had a kickoff meeting with the John Stewart Company, the Jonathan Rose Company and Bayview Senior Services staff to discuss the marketing process for 151-351 Friedell. As with 275 Coleman, postcards were mailed out to COP holders with important project information and workshops to assist applicants become rental ready. Applications were accepted from November 26 – December 20, 2024, and the lottery was held on January 7, 2025. A total of 92 COP holders applied through the DAHLIA Housing Portal for this housing opportunity, and 31 now reside at 131-351 Friedell.

(Originated by Pamela Sims, Senior Development Specialist – COP and Marketing Liaison)

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Thor Kaslofsky
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Thor Kaslofsky
Executive Director

Attachment A: Marketing Outcomes Report – 52 Kirkland Avenue
Attachment B: Marketing Outcomes Report – 275 Coleman Street
Attachment C: Marketing Outcomes Report – 151-351 Friedell Avenue

Attachment A

Mayor's Office of Housing and Community Development
City and County of San Francisco

Daniel Lurie
Mayor

Daniel Adams
Director

Marketing Outcomes Project Report

Madison at the San Francisco Shipyard

On May 6, 2014, the OCII Commission considered and approved the Memorandum of Understanding (MOU) between OCII and the Mayor's Office of Housing and Community Development ("MOHCD"). The MOU requires a Marketing Outcomes Project Report after the final unit is occupied for each OCII affordable housing development. The following report pertains to the new-for sale market rate with inclusionary ownership project at Hunters Point Shipyard, Block 52, now known as Madison at the San Francisco Shipyard.

Project Name	Madison at the San Francisco Shipyard Hunters Point Shipyard (HPS) 1 (formerly)
Project Location	52 Kirkwood Avenue, Units: • 203 • 214 • 221 • 303 • 311 • 316 • 401 • 413 • 420
Project Sponsor	Lennar
Project Tenure	Ownership
Total Number of Units	77

Total Number of Affordable Units	9: • 3 studios, ranging from 514 to 552 sq. ft. • 3 one-bedroom, ranging from 718 to 780 sq. ft. • 3 two-bedroom, ranging from 1037 to 1162 sq. ft.
Total Number of Applicants for Affordable Units	65: • 59 lottery applications • 6 post lottery applications
Affordability Level(s)	• Units priced at 75% of Area Median Income (AMI) • Maximum income to qualify - 80% AMI ($87,300 to $124,700 depending upon household size
Sales Price Range:	Affordable Price: $155,659 - $246,294 Market Rate Price: $384,000 - $750,000
Marketing Start Date	07/27/2023
Construction Completion Date	9/13/2023
First Sale Date	6/25/2024
Building Fully Occupied	8/8/2025
Lottery Preferences	1. Certificate of Preference 2. Rent Burdened or Assisted Housing Residents 3. Displaced Tenant Housing Preference Holders 4. Neighborhood Resident Housing Preference 5. Live/Work or San Francisco Residents 6. Members of the General Public
COP Applicants	0
DTHP Applicants	0
Rent-Burdened/Assisted Housing Applicants	8
Total Number of People Living in the 9 Affordable Units	16

Marketing

Lennar compiled a marketing team and commenced marketing activities for The Madison in July 2023. They placed ads in local newspapers including the San Francisco Bay View, El Tecolote, the Asian Journal, Sing Tao Daily, and the Bay Reporter. set up a webpage on the Lennar website and made social media posts on Facebook and Instagram. They held open houses with model units and provided guided tours. The lottery was set for October 3, 2023. Unfortunately, Lennar needed to extend the application deadline to January 25, 2024, and the lottery was rescheduled to February 15, 2024.

Just before the original lottery date, Lennar reported an increase in HOA fees. This occurred because the Madison was annexed into the Shipyard Condominium Homeowners Association (HOA) and the HOA board adopted a new budget that raised dues for both market rate and Below Market Rate (BMR) units. The increase was significant enough to require MOHCD to reprice the affordable units. Because HOA dues are included in the calculation of a household's total monthly housing costs, higher dues reduce the maximum mortgage payment a household can afford. To keep overall housing costs within affordability limits, the sales prices of the BMR units had to be lowered accordingly.

The extended deadline was not necessarily a negative occurrence as Lennar was experiencing a low applicant turnout with only 40 applications received by the original deadline. The extension allowed them to revise their marketing plan and conduct more robust marketing activities. There was expanded outreach to local organizations and additional open houses were scheduled, with more potential buyers attending. They also placed an ad in Organized Labor for local construction workers and used a targeted listserv with Bay Area News Group for social media posts. While the extended deadline did mean that the original 40 applicants experienced a lengthy wait time for the lottery, it also increased the applicant pool, rising from 40 to 59 households. In the end, 8 of the 9 BMR units were purchased by applicants from the initial marketing efforts, at a lower, more affordable price.

All 59 households were contacted for the remaining studio unit and still, it went unsold. Several applicants withdrew because the 514 square foot unit did not meet their household needs. Because the lottery list had been exhausted, on November 25, 2024, Lennar began marketing the unit to be sold on a first come, first sold basis. They held multiple open houses to attract eligible buyers, and the unit sold to an eligible buyer on August 8, 2025.

Outreach to COP Holders

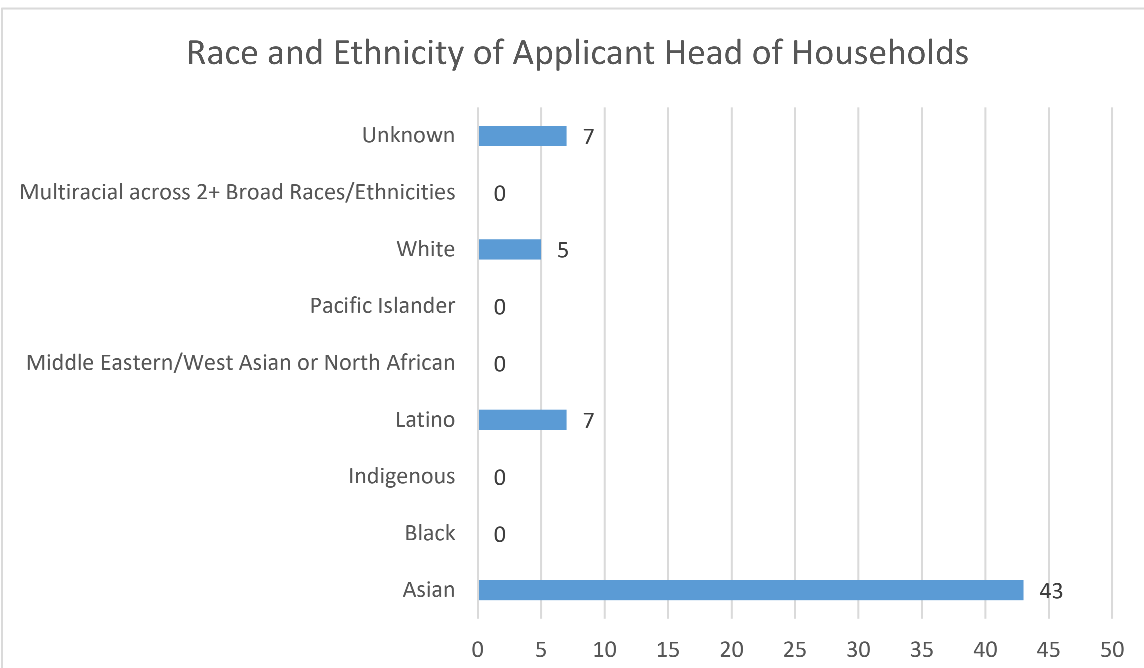
As part of the COP early outreach efforts, all 913 Certificate of Preference (COP) holders at the time of marketing received a postcard in November 2021 promoting this homeownership opportunity at the Shipyard. The San Francisco Housing Development Corporation offered homeownership workshops to assist applicants with completing their applications and preparing financially for homeownership. Certified housing counselors were available to provide individualized support to COP applicants throughout the process. While none of the COP holders participating in these workshops applied for the units at the Madison, many of them were inspired to continue preparing for homeownership to apply for future opportunities.

Lottery Preferences

A total of 65 households applied. Fifty-nine (59) through the lottery and 6 after the lottery list was exhausted. MOHCD reviewed a total of 64 of 65 applications for the 9 affordable homes. Of the applicants reviewed, 53 withdrew because the unit size did not meet their household's needs and 2 were disqualified for being over income and the other for submitting an incomplete application. The nine households that successfully purchased homes consist of three from the Neighborhood Resident Housing Preference applicant pool, five from the Live/Work in San Francisco preference pool, and the applicant that purchased after the lottery was a San Francisco resident.

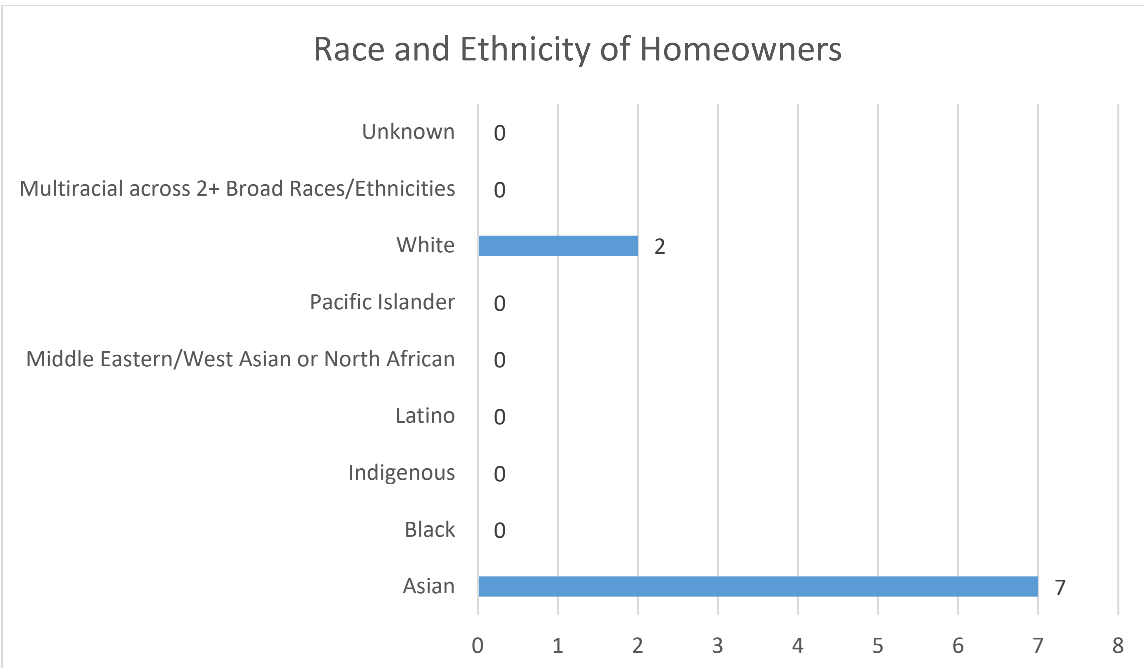
Applicant Demographics

Applicants were asked to report both their race and ethnicity. The majority or 43 applicants (78%) identified their race as Asian, and 7 applicants (13%) identified as Latino.



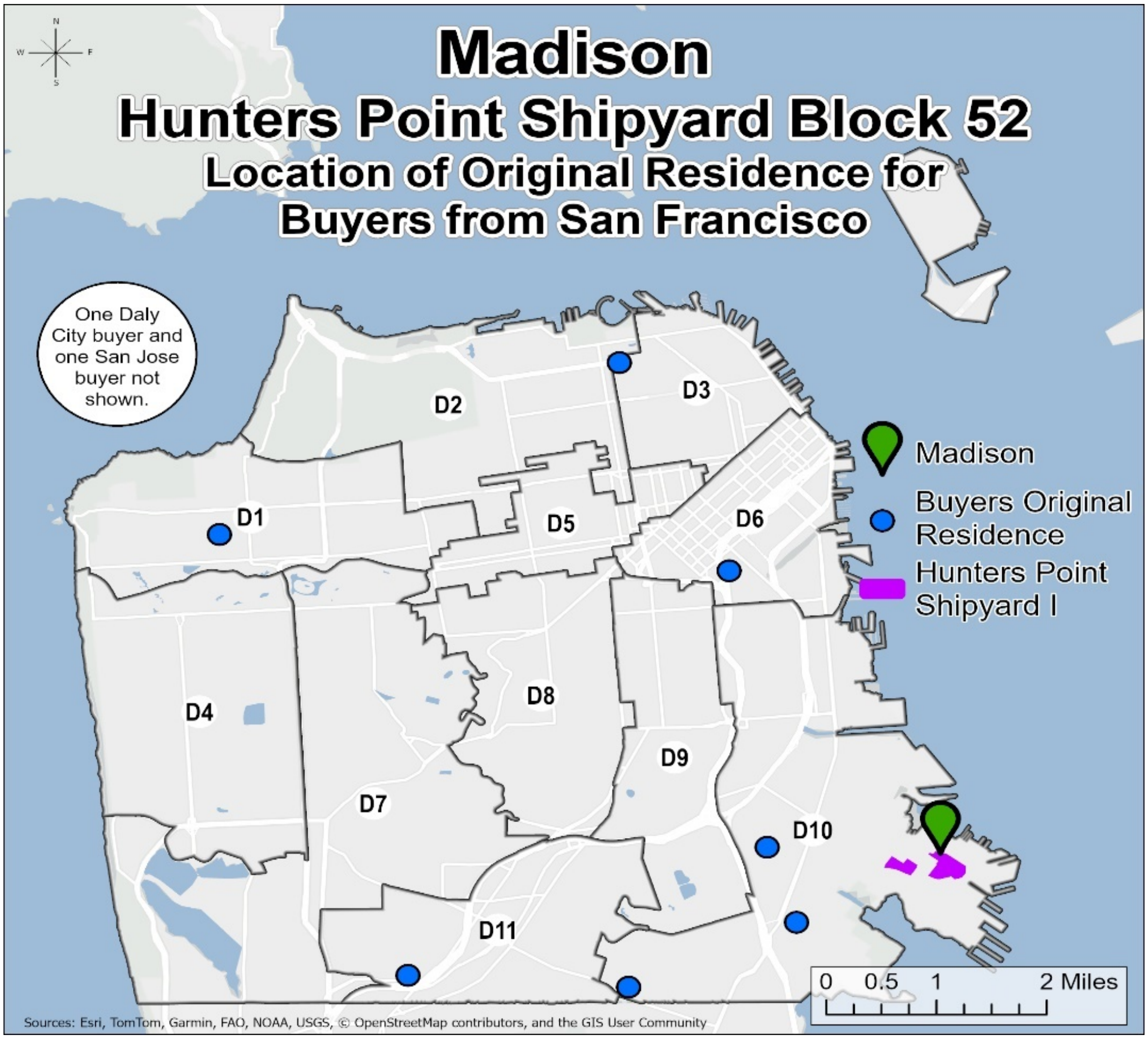
Homeowner Demographics

The following is the race and ethnicity demographics of the nine Madison primary applicants that purchased housing. Among households that purchased, 7 (78%) identified as Asian and 2 (22%) identified as White. Additionally, the average household income of the homebuyers at this project is 72% AMI or $78,294. The average household size is 1.7. Three of the nine households have children, and one includes a senior household member.



Location of Origin of Homeowners

The 7 homeowners came from several locations throughout San Francisco, and 2 households lived outside of San Francisco (Daly City and San Jose).



First Time Homebuyer Stories

One household that utilized the live in San Francisco preference, purchased a 2-bedroom condominium for herself and her 84-year-old mother. She is a self-employed bookkeeper and as head of household, strived to make ends meet while providing in-home care for her elderly mother who receives a pension. With the help of their lender, the housing counseling agency, and MOHCD, they were able to secure financing to purchase this affordable home.

Another family were long-time residents of District 10. The family of 4 utilized the Neighborhood Resident Housing Preference (NRHP) to purchase a 2-bedroom condominium for their growing family. The family has two young children under 6, who were excited to move into their new home. The parents work as an administrative assistant at an insurance company, and as a coordinator at a local hotel. The household received down payment assistance from the Workforce Initiative Subsidy for Homeownership (WISH) program offered by the Federal Home Loan Bank of San Francisco and a lender closing costs grant to achieve their homeownership dream in San Francisco. The NRHP allowed them to purchase a home big enough for their family, in their same neighborhood, close to their family.

Attachment B

Mayor's Office of Housing and Community Development
City and County of San Francisco

Daniel Lurie
Mayor

Daniel Adams
Director

Marketing Outcomes Project Report

Dorris M. Vincent Apartments

On May 6, 2014, the Office of Community Investment and Infrastructure (OCII) Commission considered and approved the Memorandum of Understanding (MOU) between OCII and the Mayor's Office of Housing and Community Development (MOHCD). The MOU requires a Marketing Outcomes Project Report after the initial lease-up or sales of each OCII affordable housing development. The following is the report for Hunters Point Shipyard Block 4591C, Lot 217, now known as Dorris M. Vincent Apartments, 275 Coleman Street.

Project Name	Dorris M. Vincent Apartments	
Project Location	275 Coleman Street	
Project Sponsor	Mercy Housing	
Project Tenure	Rental	
Total Number of Units	72 including: • 54 lottery units • 18 San Francisco Housing Authority (SFHA) subsidized units through the Project Based Voucher (PBV) program	
Units by Size	54 Lottery Units: • 4 Studios • 15 – 1 bedroom • 23 – 2-bedroom • 10 – 3-bedroom • 1 – 4-bedroom • 1 – 5-bedroom	18 SFHA PBV Units: • 3 – 1 bedroom • 8 – 2-bedroom • 6 – 3-bedroom • 1 – 4-bedroom
Total Number of Applicants	4,768	

Affordability Level(s)	Lottery Units: • Between 39% and 50% Area Median Income (AMI) SFHA PBV Units: • 0% to 50% AMI
Marketing Start Date	10/24/2024
Construction Completion Date	4/28/25
Building Fully Occupied	8/6/2025
Lottery Preferences	1. Certificate of Preference 2. Displaced Tenant Housing Preference 3. Neighborhood Resident Housing Preference 4. San Francisco residents and employees 5. General Public
COP Applicants	81
COP Applicants Housed in Lottery Units	8
SFHA PBV Preferences	1. Certificate of Preference 2. Other involuntarily displacement from San Francisco 3. Veteran
COP Applicants Housed in SFHA PBV Units	12
Total Number of People Living in the 72 Affordable Units	199

Marketing

The overall marketing strategy for Dorris M. Vincent Apartments and a similar OCII project, Oscar James Residences, was designed to target Certificate of Preference (COP) holders, including descendants, as well as residents of District 10. This focus reflected a commitment to equitable outreach within the community. The approach relied on localized engagement through workshops.

Using this strategy, Mercy Housing successfully reached 81 COP holders, 780 neighborhood residents with a total of 4,768 applications. Comparably, the last Shipyard rental project, Hunters View (2b)in 2017, had just 19 COP applicants. Today's outcomes reflect the effectiveness of the targeted approach and the strength of all of the recent year's COP outreach efforts. The San Franisco Housing Development Corporation (SFHDC) hosted six in-person information sessions in the Bayview, Fillmore and Western Addition neighborhoods. They also conducted online workshops and produced a promotional video posted to social media platforms.

Mercy Housing's marketing campaign achieved its primary goal of reaching a significant number of COP holders and District 10 residents while also attracting many other applicants. Overall application volume for Dorris M. Vincent Apartments was consistent with other affordable housing listings in Districts 10 and 11, averaging 88 applications per unit.

Outreach to COP Holders

COP Outreach efforts also included sending three rounds of postcards to nearly 2,000 COP holders to ensure adequate time to prepare for the application process. MOHCD staff also included the information in its monthly COP email newsletter and project-specific notifications subscribed by approximately 1,300 certificate holders each month between March and November 2024.

By the application deadline, Dorris M. Vincent Apartments received the highest number of COP applicants since MOHCD began implementing the program in 2012. This reflects both the strong demand for the property—given its new construction, desirable location, affordability, and on-site amenities—and the fact that it was among the first developments to offer Descendant COP holders access to a DAHLIA lottery. This also reflects the availability of SFHA PBV units for COP holders requiring rental assistance, given that the average AMI of COP holders is 37%.

DAHLIA Lottery Units

The following table summarizes the number of applicants by preference category. Applicants in the top 3 preferences are also counted in the Live/Work and general population categories.

Preference Type	**Certificate of Preference (COP)**	**10 Units available for Displaced Tenant Housing Preference (DTHP)**	**21 Units available for Neighborhood Resident Housing Preference (NRHP)**	**Live and/or Work in SF**	**General Population**
Number of Applicants	COP-A: 1 COP-C: 11 COP-D: 69 Total: 81	9	780	4,081	531

Dorris M. Vincent Apartments was the first new affordable rental housing development sponsored by OCII after the 2021 State law extended the COP to include direct descendants of originally displaced household members. Like original displaced households, direct descendant COP holders received top priority in the affordable housing lottery, in fact, most COP applicants for Doris M. Vincent were descendants.

COP holders applied primarily from San Francisco (80%) but several outside areas as well: Sacramento, Oakland, Antioch, Pittsburgh, Berkeley, Richmond, Pinole, San Pablo, El Cerrito, San Leandro, Fairfield, Roseville, Stockton, and Suisun City.

73 of the COP applicants did not end up living at Dorris M. Vincent Apartments. Of those that did not move in, 44 withdrew their application and 16 joined the waitlist to have the option of moving in at a later time. 8 were over income, and 5 moved into a SFHA PBV unit. Several COP applicants who withdrew their application chose to move forward with leasing at Oscar James Residences (151–351 Friedell Street), which was leasing at the same time.

As one of the first new housing opportunities available to hundreds of recently approved descendant COP holders, the lottery sparked tremendous interest—offering a rare chance that many felt they simply couldn't afford to miss, even if they weren't certain they would ultimately move into the building.

San Francisco Housing Authority Project-Based Voucher Units

To be eligible for a SFHA PBV unit, total household annual income could not exceed 50% AMI or $88,150 in 2024 for a family of 3. Rent for these units is subsidized and based on 30% of the household annual gross income. PBV units are managed by the SFHA and are not posted on the DAHLIA San Francisco Housing Portal and are not included in the housing lottery. SFHA had a total number of 18 PBV units at Dorris M. Vincent Apartments. SFHA filled vacancies through referrals from its PBV waitlist who are ranked using a point-based system based on specific preference.

COP holders received the highest priority followed by the SFHA's other priorities given to applicants who qualified as households involuntarily displaced from a San Francisco residence households and veterans or surviving veteran spouses on their waiting list. COP holders were housed in 67% of all the PBV units available.

Coordinating MOHCD, OCII, the project sponsor and the SFHA on one lease up has in the past been a tricky endeavor. To support Dorris M. Vincent lease-up and ensure smooth process, MOHCD and OCII staff partnered with SFHA and Mercy Housing to streamline referrals, eligibility reviews, approvals, and leasing for COP applicants.

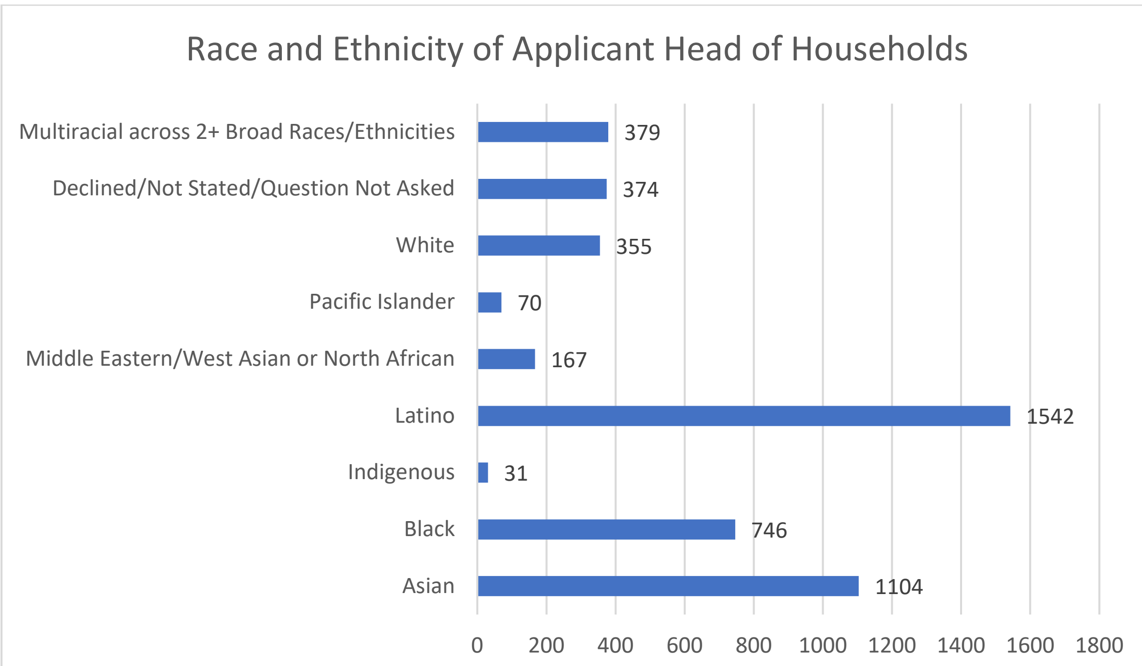
Previously, SFHA and MOHCD filled units in silos resulting in inefficiencies and duplicative work for project sponsors, staff and applicants. Under a new coordinated approach, all the partners providing units used the same COP lottery list during lease-up and simultaneously confirmed applicant interest and initiated income eligibility. This greatly reduced unnecessary administrative work and improved overall efficiency.

Ultimately, 12 COP holders leased PBV units, paying 30% of their income for housing. OCII, MOHCD and SFHA strengthened coordination to match eligible applicants to vacancies.

Applicant Demographics

The following summarizes the demographics of the 4,768 lottery applicants to Dorris M. Vincent Apartments.

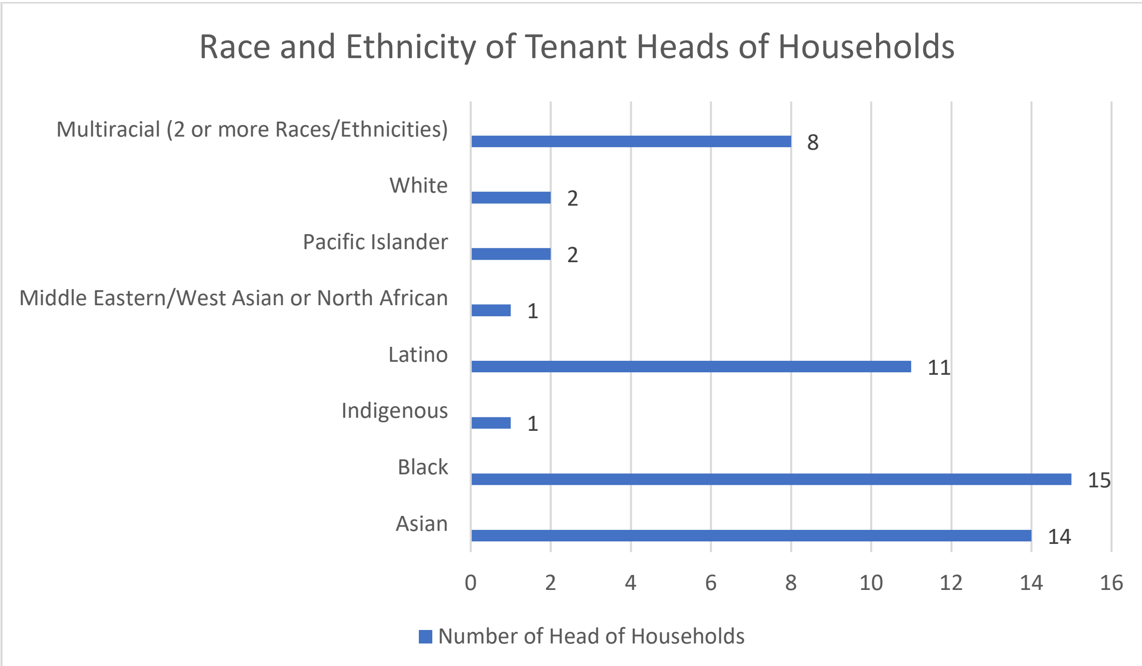
MOHCD uses an expanded list of race categories to classify the demographics of the primary applicant on a household application. Each primary applicant is asked to select all categories that best describe their race and ethnicity. Among Dorris M. Vincent lottery applicants, 32% identified as Latino, 23% as Asian, and 16% as Black.



Tenant Demographics

The following is demographic information focusing on the 54 primary applicants (through DAHLIA) that signed leases to occupy Dorris M. Vincent.

Race and Ethnicity



Of the successful DAHLIA applicant households at Dorris M. Vincent Apartments, 28% (or 15 households) identify their race as Black. 26% (or 14 households) identified as Asian and 20% (or 11 households) identified as Latino.

This chart does not include race and ethnicity of the PBV tenant households. However, of the 12 COP tenants in the PBV units at Dorris M. Vincent Apartments, 11 people identify their race as Black, and 1 person identifies as Multiracial (2 or more Races/Ethnicities).

Average Household Size

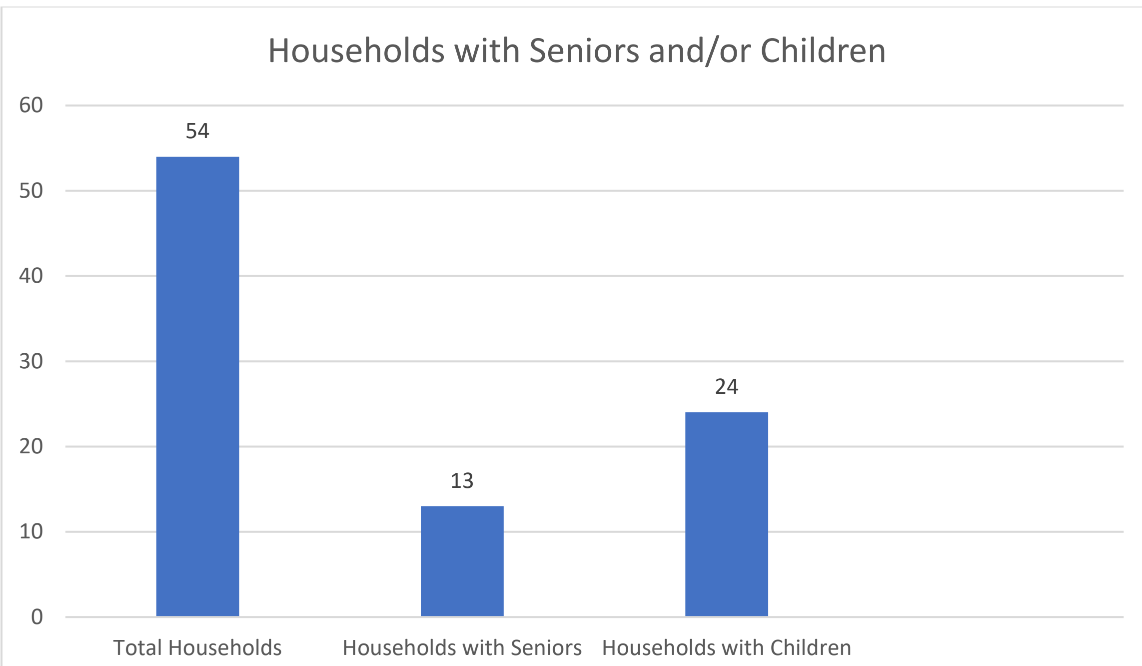
Applicants are assigned units at Dorris M. Vincent based on household size. At Dorris M. Vincent Apartments, for example, 1-2 people could live in a studio, and 8-11 people could live in a 5-bedroom unit.

Of the total 72 housing units, the average household size varied by unit type:

- 1.25 people – Studio
- 1.6 people – 1 bedroom
- 2.6 people – 2-bedroom
- 4.2 people – 3-bedroom
- 7 people – 4-bedroom
- 11 people – 5-bedroom

Households with Seniors and/or Children

The following is the number of households with seniors and/or children at Dorris M. Vincent Apartments.

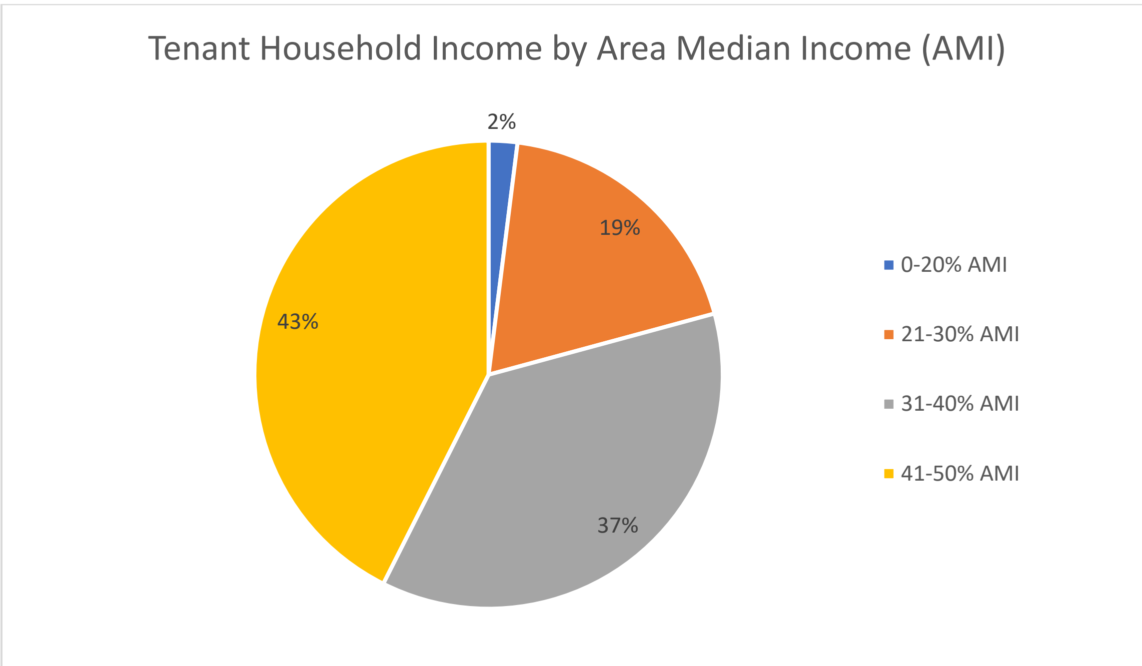


The larger unit mix of two-, three-, four-, and five-bedroom units addressed a great housing need for families. Nearly half of all households include children, representing a total of 53 children at the property. Most are under the age of 12 (77%, or 41 children), with over one-third aged 5 and under (36%, or 19 children). In addition, 24% of households include seniors, reflecting multigenerational living at Dorris M. Vincent Apartments. Tenants frequently cite the safe and stable neighborhood as especially important for themselves and their young children. The building's amenities include proximity to bus stops, on-site laundry, resident services, and controlled access, support the needs of families and seniors.

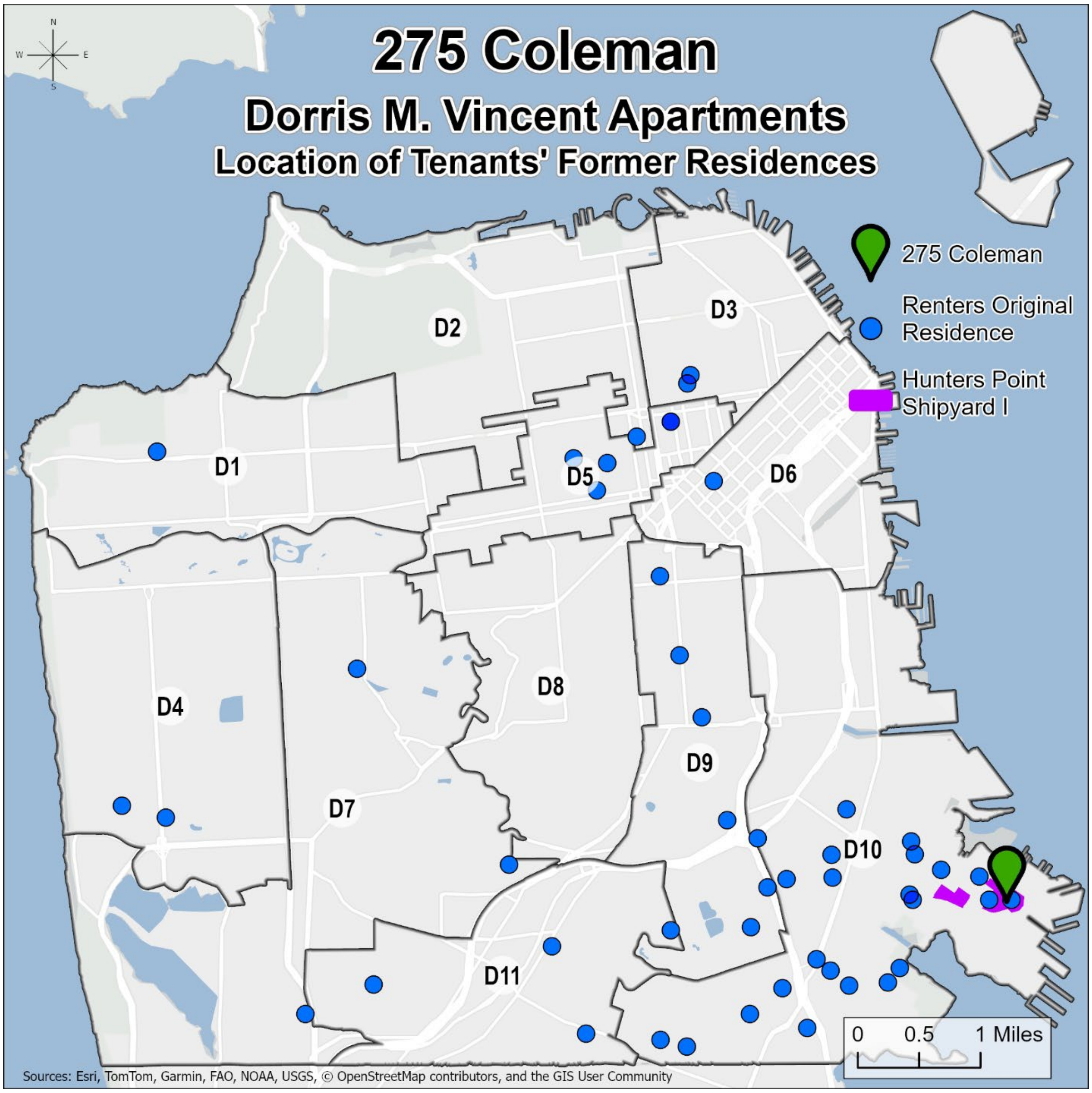
Area Median Income (AMI)

The rent for the lottery units was set to be affordable to households at 30% and 50% AMI or between $42,100and $70,150 for a 3-person household. The following summarizes the AMI of the 54 lottery tenant households at Dorris M. Vincent Apartments. Nearly half of the households are between 41% and 50% AMI.

This graph does not include the 18 households living in PBV units at Dorris M. Vincent Apartments who are below 50% AMI and pay income-based rent (30% of their monthly income).



Location of Tenants Origin



At 43%, District 10 is well represented in households served by this affordable housing opportunity helping families that want to stay within their neighborhood. The second largest group of tenants lived in District 9 (11%) and District 9 (9%). Eleven percent (11%) of the households hailed from outside of San Francisco, 1/3 of whom are COP holders.

The12 COP households living in PBV units at Dorris M. Vincent Apartments. moved from within San Francisco (58%) including District 10 (42%) and District 5 (17%). The remaining COP tenants moved from Sacramento, San Leandro, Oakland, and Marysville.

COP Story

One Certificate of Preference holder, a descendant of a family displaced from Hunters Point, moved into a SFHA PBV unit at Dorris M. Vincent Apartments in July 2025. A single father raising his son full-time, he relocated from Sacramento in search of greater opportunity and stability. He received his COP through his grandfather, who was displaced in the 1970s. At a transitional time in his life, the opportunity to return to San Francisco and secure housing through the COP program provided a meaningful fresh start for his family. This COP holder describes the Dorris M. Vincent community as welcoming, safe, and supportive. He values the Bayview neighborhood's resources and public transportation system, which have made it easier to navigate daily life without a vehicle. He also credits property management and residential services staff for their strong support and genuine care for residents. He shared his appreciation to OCII and the City and County of San Francisco for providing his family with stability, safety, and the opportunity to grow and thrive.

Attachment C

Mayor's Office of Housing and Community Development
City and County of San Francisco

Daniel Lurie
Mayor

Daniel Adams
Director

Marketing Outcomes Project Report

Oscar James Residences

On May 6, 2014, the Office of Community Investment and Infrastructure (OCII) Commission considered and approved the Memorandum of Understanding (MOU) between OCII and the Mayor's Office of Housing and Community Development (MOHCD). The MOU requires a Marketing Outcomes Project Report after the initial lease-up or sales of each OCII affordable housing development. The following is the report for Hunters Point Shipyard Block 45191C, Lots 212 and 673, now known as Oscar James Residences, 151-351 Friedell Street.

Project Name	Oscar James Residences	
Project Location	151-351 Friedell Street	
Project Sponsor	Jonathan Rose Companies Bayview Hunters Point Multipurpose Senior Services	
Project Tenure	Rental	
Total Number of Units	110 including: • 82 lottery units • 28 San Francisco Housing Authority (SFHA) subsidized units through the Project Based Voucher (PBV) program	
Units by Size	82 Lottery Units: • 37 – 1 bedroom • 22 – 2-bedroom • 17 – 3-bedroom • 6 – 4-bedroom	28 PBV units: • 12 – 1 bedroom • 7 – 2-bedroom • 6 – 3-bedroom • 2 – 4-bedroom • 1 – 5-bedroom
Total Number of Applicants	6,012	

Mayor's Office of Housing and Community Development, 1 South Van Ness Avenue – Fifth Floor, San Francisco, CA 94103
Phone: (415) 701-5500 Fax: 628-652-5871 TDD: (415) 701-5503

Affordability Level(s)	Lottery Units: • Between 39% and 50% Area Median Income (AMI) SFHA PBV Units: • 0% and 50% AMI
Marketing Start Date	11/26/2024
Construction Completion Date	5/15/2025
Building Fully Occupied	1/5/2026
Lottery Preferences	1. Certificate of Preference 2. Displaced Tenant Housing Preference 3. Neighborhood Resident Housing Preference 4. San Francisco residents and employees 5. General Public
COP Applicants	92
COP Applicants Housed in Lottery Units	9
SFHA PBV Preferences	1. Certificate of Preference 2. Other involuntarily displacement from San Francisco 3. Veteran
COP Applicants Housed in SFHA PBV Units	22
Total Number of People Living in the 110 Affordable Units	239

Marketing

Like Dorris M. Vincent apartments, the overall marketing strategy for Oscar James Residences was to target Certificate of Preference (COP) holders, including descendants, as well as residents of District 10. This focus reflected a commitment to equitable outreach within the community. Using this strategy, Jonathan Rose Companies and Bayview Hunters Point Multipurpose Senior Services (Bayview Senior) reached 92 COP holders, 924 neighborhood residents with a total of 6,012 applications. These outcomes reflect the effectiveness of the targeted approach and the strength of the outreach efforts. Oscar James Residences received approximately 1,500 more applications than Dorris M. Vincent Apartments, perhaps driven in part by the momentum generated. Raised awareness among COP holders likely contributed to more COP applicants being prepared after missing the earlier deadline.

Building on lessons learned and the success of hosting in-person neighborhood workshops, Bayview Senior hosted two workshops at 1753 Carroll Avenue in the Bayview neighborhood and conducted a “word of mouth” campaign. They sent out flyers to their social media listserv and worked with other D10 community organizations to get the word out to COP holders and the neighborhood. They directly contacted other agencies as they are widely known in the community, and they provided one-on-one services to help applicants apply. 33 applicants listed BHPMSS as their alternate contact, including 11 COP holders.

The partnership of these two organizations resulted in a successful marketing campaign that achieved its primary goal of reaching a significant number of COP holders and District 10 residents while also attracting a substantial number of other applicants.

Jonathan Rose Companies engaged the John Stewart Company (JSCo) to lease Oscar James. The lease-up was delayed following the unexpected departure of the Regional Manager for this property, which left a newly assembled leasing team without the specialized tax credit program training needed to navigate the project’s requirements. Additional time was required to provide technical and cultural competency training for the leasing team and align on staffing needs. After this reset, the team was able to move forward effectively to lease up the project.

Outreach to COP Holders

The 2017 survey of COP holders identified areas of the city where COP holders wanted to live. The Bayview Hunters Point area was high on the respondents list. Because Oscar James Residences offered many subsidized apartments where tenants pay 30% of their income, it was a great opportunity for COP holders. COP outreach efforts included three rounds of project-specific notification postcards sent to nearly 2,000 COP holders, timed to align with the start of construction and the upcoming application period. This provided COP applicants with enough time for adequate application preparation time without overwhelming them with too many notices. MOHCD staff also included the information in its monthly emailed COP newsletter is subscribed by approximately 1,300 certificate holders.

By the application deadline, Oscar James Residences received the highest number of COP applicants to date, surpassing the previous record set by Dorris M. Vincent Apartments. Again, this reflects the timing of the availability of units, a strong collaborative marketing plan and the availability of SFHA PBV units for COP holders requiring rental assistance.

DAHLIA Lottery Units

The following table summarizes the number of applicants by preference category. Applicants in the top 3 preferences are also counted in the Live/Work and general population categories.

Preference Type	**Certificate of Preference (COP)**	**16 Units available for Displaced Tenant Housing Preference (DTHP)**	**32Units available for Neighborhood Resident Housing Preference (NRHP)**	**Live and/or Work in SF**	**General Population**
Number of Applicants	COP-A: 0 COP-C: 18 COP-D: 74 Total: 92	13	924	5,026	937

As one of the first new affordable rental housing opportunities available to hundreds of recently approved descendant COP holders, the Oscar James Residences lottery presented an opportunity many COP holders felt they could not pass up, even if they did not ultimately move into the building. Like originally displaced households, direct descendant COP holders receive top priority in the affordable housing lottery. Most COP applicants for Oscar James Residences were descendants.

COP holders applied primarily from San Francisco (81%) but several outside areas as well: Sacramento, Oakland, Antioch, Pittsburgh, Berkeley, Richmond, Pinole, San Pablo, El Cerrito, San Leandro, Fairfield, Roseville, Stockton, and Suisun City. Most (94%) of the COP holders that signed leases were from San Francisco.

83 of the COP applicants did not end up living at Oscar James Residences. Of the 83 COP applicants who did not move in, 55 withdrew their application and 2 joined the waitlist to have the option of moving in at a later time. Fourteen (14) moved into a SFHA PBV units, 9 were over income, and 3 did not meet the minimum income requirements and the PBV units had been exhausted.

San Francisco Housing Authority Project-Based Voucher Units

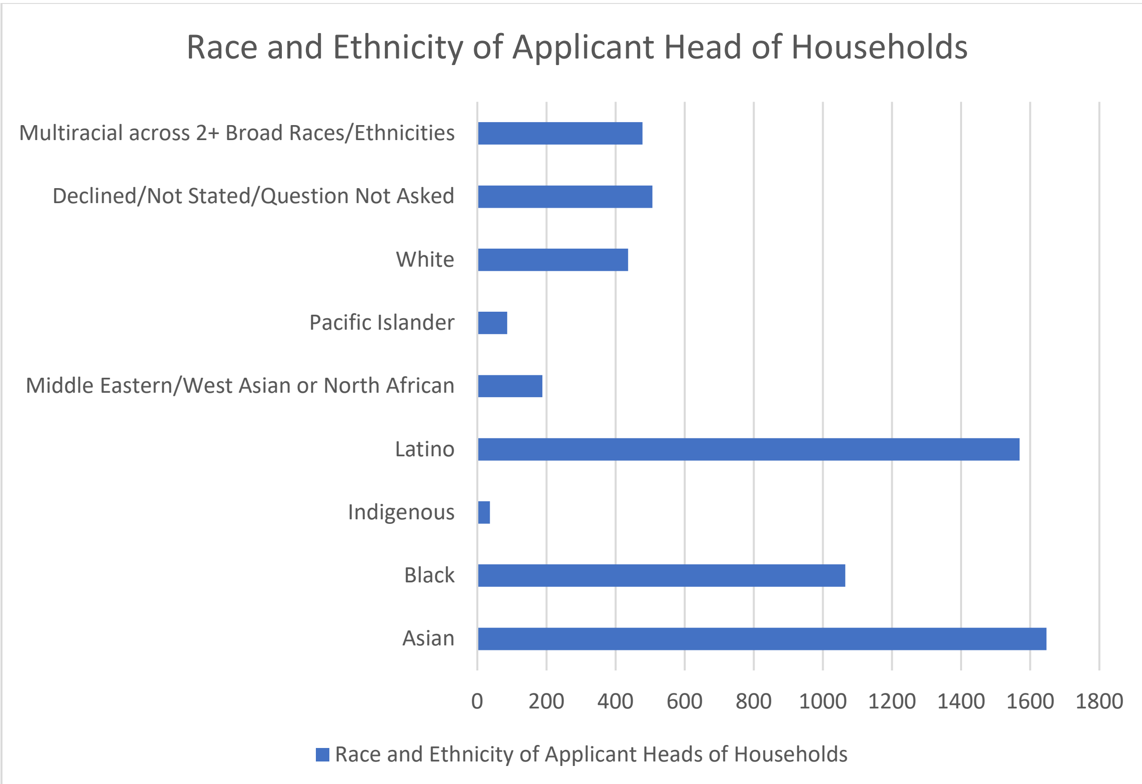
To be eligible for a SFHA PBV unit, total household annual income must not exceed 50% AMI or $88,150 in 2024, for a family of 3. Rent for these units is subsidized and based on 30% of the household's annual gross income. PBV units are managed by the SFHA and are not posted on the DAHLIA San Francisco Housing Portal and are not included in the housing lottery for City-sponsored housing units. SFHA had a total of 28 PBV units available at Oscar James Residences and they filled vacancies through referrals from its PBV waitlist.

The PBV waitlist is ranked using a point-based system based on specific preference. COP holders received the highest priority followed by applicants who qualified as being involuntarily displaced from a San Francisco residence for other reasons and finally, veterans or surviving veteran spouses. COP applicants were housed in 79% of all the PBV units available.

Having had the recent experience of leasing the Dorris M. Vincent Apartments, MOHCD and OCII staff partnered with SFHA and John Stewart Company (JSCo) to further streamline referrals, eligibility reviews, approvals, and leasing for COP applicants. MOHCD and OCII worked closely with JSCo and Bayview Senior to facilitate COP referrals for PBV units to SFHA and to support applicants throughout the process. Due to staffing changes at JSCo and a less experienced new team taking on both lottery and PBV lease-up, MOHCD and OCII provided additional coordination to ensure clear communication among the lease-up team, SFHA, Bayview Senior, and COP applicants. Ultimately, 22 COP holders leased PBV units, paying 30% of their income for housing.

Applicant Demographics

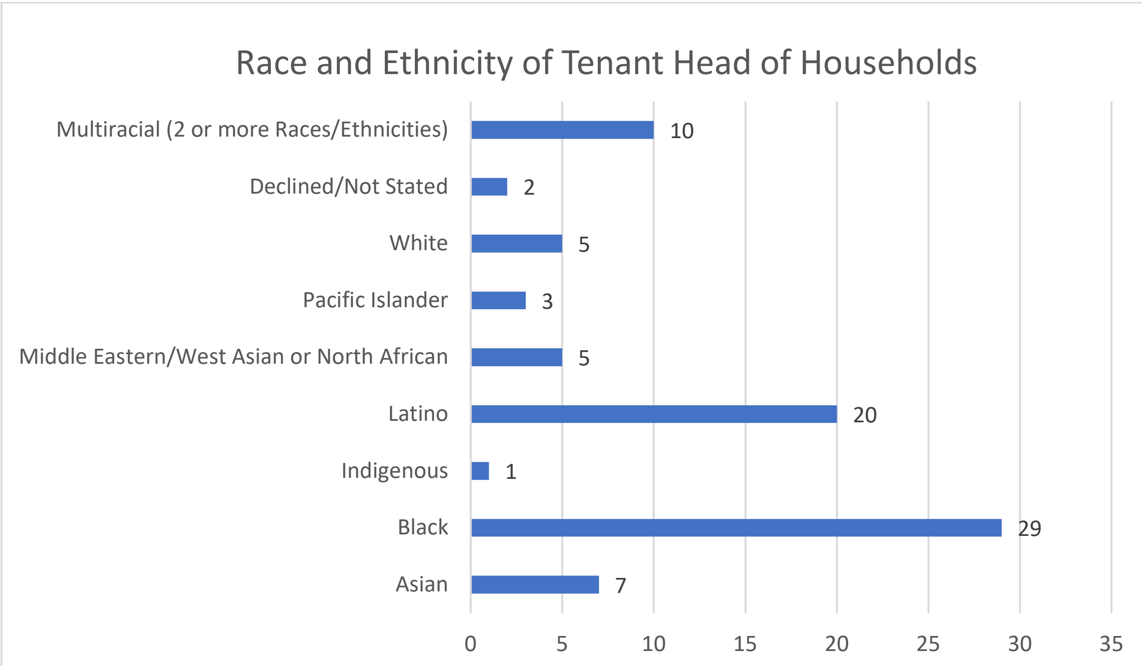
The following summarizes the demographics of the 6,012 lottery applicants to Oscar James Residences. MOHCD uses an expanded list of race categories to classify the demographics of the primary applicant of each household. Among Oscar James Residencies lottery applicants, 27% identified as Asian, 26% as Latino, and 18% as Black.



Tenant Demographics

The following is demographic information focusing on the 82 primary applicants that signed leases to occupy Oscar James Residences.

Race and Ethnicity



Of the successful lottery applicant households, 35% (or 29 households) identify their race as Black, 29% (or 20 households) identified as Latino. Of the 22 COP tenants in PBV units, 18 people identify their race as Black, and 4 identify as Pacific Islander.

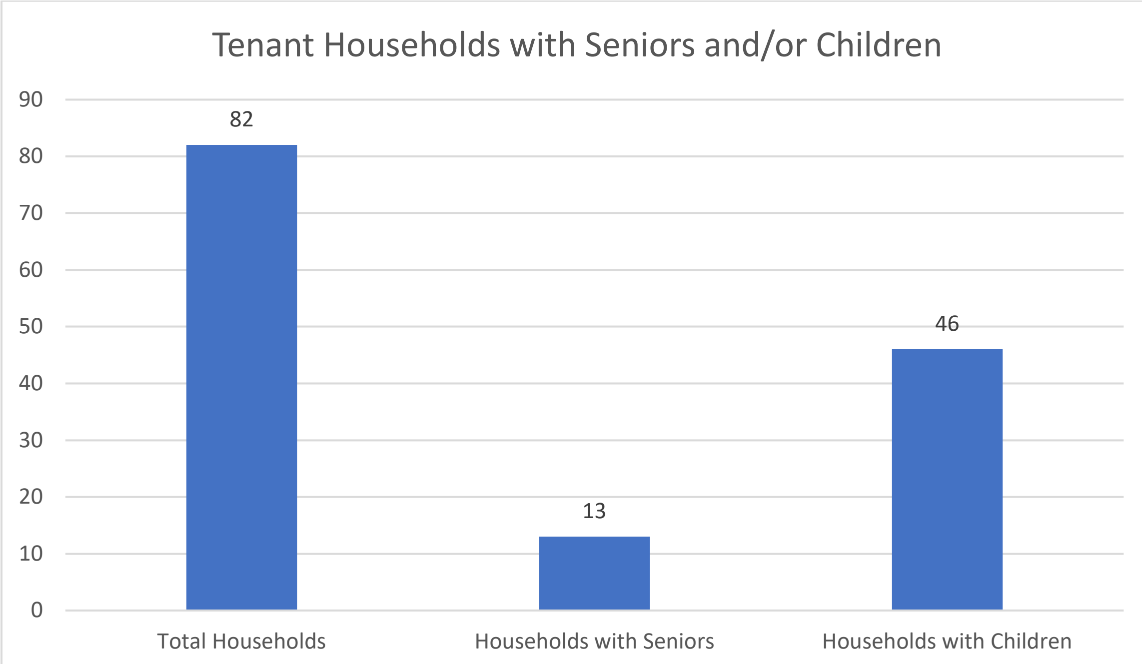
Average Household Size

Applicants were assigned units at Oscar James Residences based on household size. For example, 1-2 people could live in a studio, and 8-11 people could live in a 5-bedroom unit. Of the total 110 housing units, the average household size varied:

- 1.08 people – 1 bedroom
- 2 people – 2-bedroom
- 3.8 people – 3-bedroom
- 4.1 people – 4-bedroom
- 9 people – 5-bedroom

Households with Seniors and/or Children

The following is the number of multi-generational households living at Oscar James Residences.

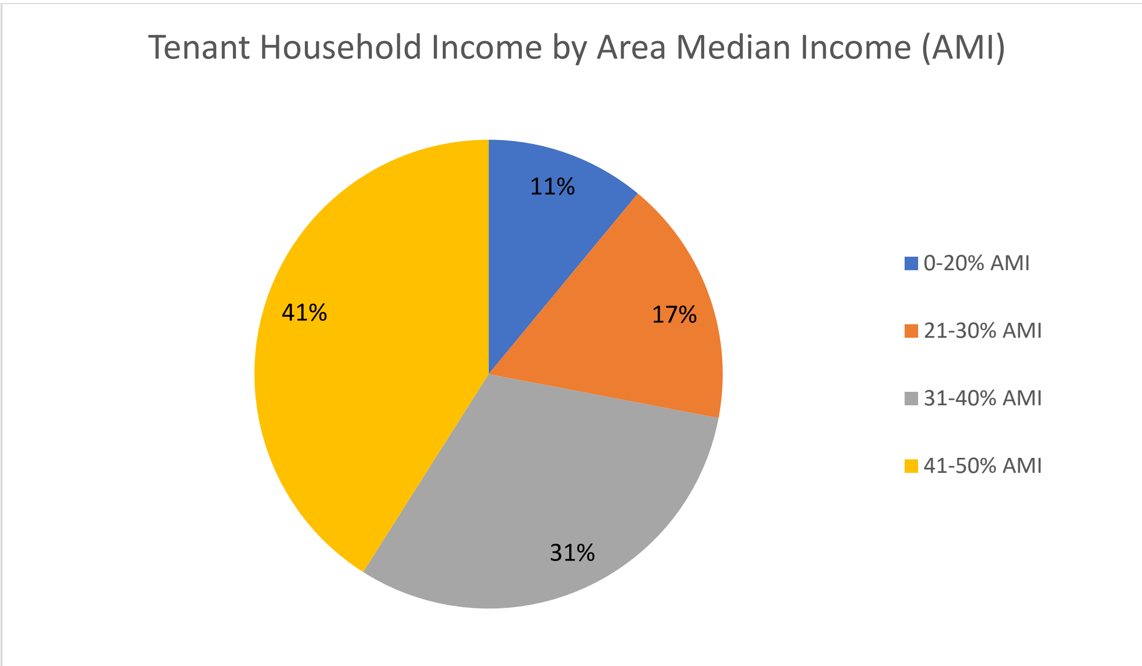


The larger unit mix of two, three, and four-bedroom units addressed a great housing need for families. Over half of all households include children, representing a total of 88 children at the property. Nearly half are between 6 and 12 years old and 25% are under the age of 6. In addition, 16% of households include seniors, reflecting multi-generational living at Oscar James Residences.

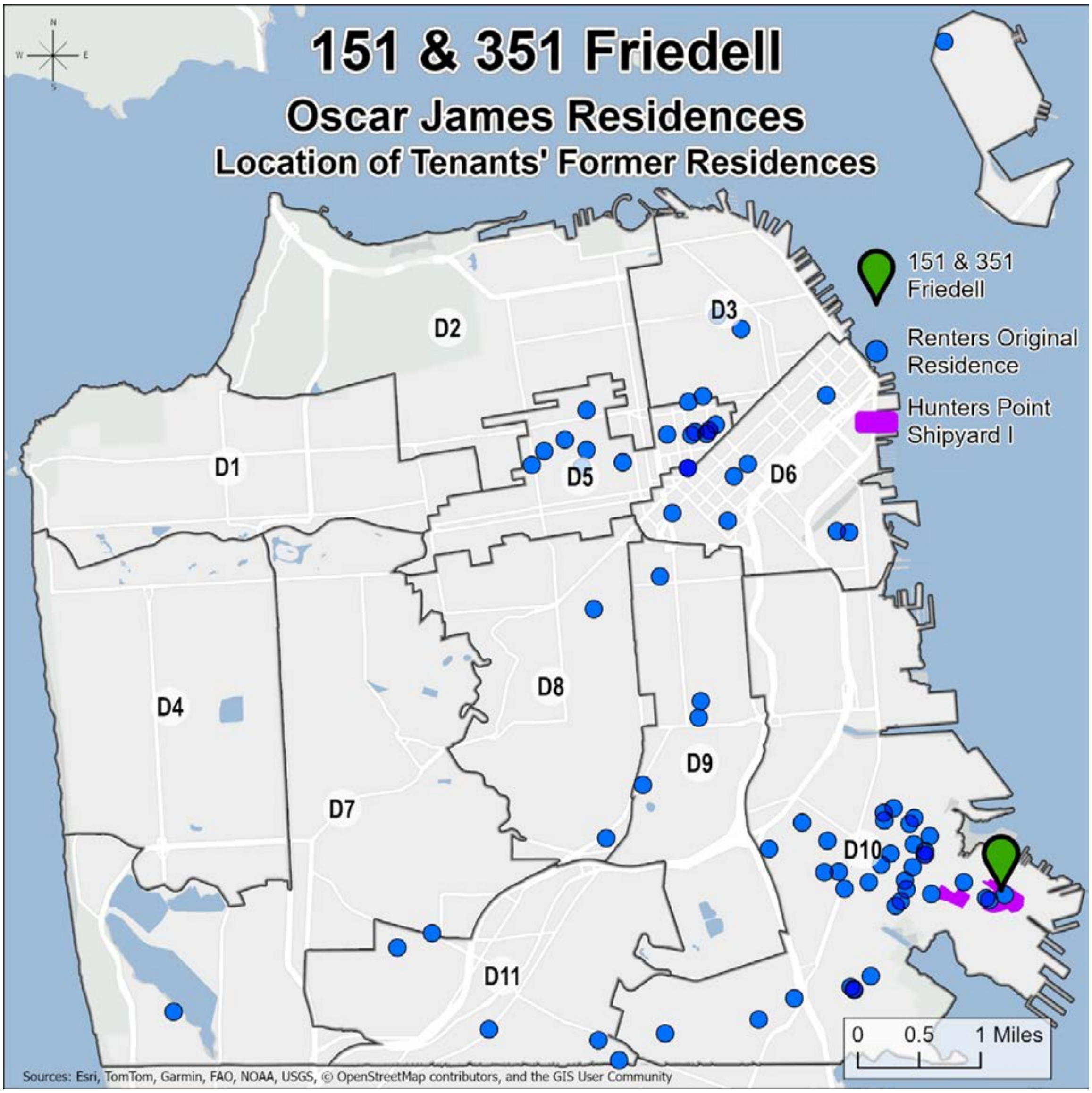
Like Dorris M. Vincent tenants, people living at Oscar James Residences frequently cite the safe and stable neighborhood as especially important for themselves and their young children. The building's amenities including proximity to bus lines, landscaped courtyards, fitness room, on-site laundry, resident services programs, and controlled property access support the needs of families and seniors.

Area Median Income (AMI)

The rent for the lottery units was set to be affordable to households between 30% and 50% AMI or $40,450and $67,450 for a 3-person household. The largest number of households are between 41% and 50% AMI. About one-third are between 31% and 40% AMI, and one-third have income below 30% AMI. Not shown here but notable are the 28 households living in PBV units who are below 50% AMI and pay rent that is 30% of their monthly income.



Location of Tenants Origin



At 44%, District 10 is well represented in households served by this affordable housing opportunity. That means nearly half of the tenant families were able to stay within their neighborhood. The second largest group of tenants lived in District 5 (17%) and District 6 (13%). Six percent (6%) of the households hailed from outside of San Francisco, all of whom are COP holders.

Most of the 22 households living in PBV units moved from within San Francisco (64%) including District 10 (32%) and District 5 (14%). The remaining COP PBV tenants (14%) moved from Berkeley, Vallejo, San Pablo, and Oakland. Three (3) COP PBV tenants are formerly homeless and now enjoying the comfort and security of their own affordable home.

COP Stories

After many years living in a one-bedroom SFHA housing unit, one Certificate of Preference holder and her daughter, direct descendants of a family originally displaced, moved into a two-bedroom SFHA PBV unit at Oscar James Residences. Encouraged by her brother to apply, she signed her lease on her 35th birthday and was drawn to the property's quality and peaceful environment. In just four months, she has experienced a strong sense of community and even led a successful petition effort to advocate for a school bus stop for Shipyard families. As a licensed insurance agent and healthcare professional, she values the stability and on-site amenities that support both her work and her family's well-being. Her story highlights the stability, opportunity, and community engagement made possible through affordable housing.

Another COP holder, a direct descendant of a family originally displaced, moved into a four-bedroom PBV unit with his family, marking a transformative turning point. Prior to moving to the Residences, the family lived in Las Vegas, where both parents were focused on career advancement and building stability for their young children. The family struggled financially and were evicted in 2024. Now, stable housing has enabled them not only to recover but to thrive. One parent is attending San Francisco State University, while pursuing an insurance license. Their children are growing up in a safe and consistent environment rooted in opportunity. The family extends profound appreciation to OCII and MOHCD for advancing policies that strengthen families, restore generational connection, and ensure that San Francisco remains a place where legacy and opportunity can coexist.