

ANNUAL REPORT



LETTER FROM OUR MANAGING DIRECTOR



THIS YEAR marks the 75th anniversary of the Housing Act of 1949, which passed into law the lofty, and as of yet unachieved goal of “a decent home and suitable living environment for every American family.” Not since the post-war years have we seen such widespread housing shortages and affordability challenges.

At Terner, we are responding to this challenging moment with renewed focus and a wider reach. That includes doubling down on our work, lifting up promising practices to add new housing supply, tackling opportunities for making housing subsidy dollars go farther, and engaging deeply on opportunities for cost control through innovations in the industrialized construction sector.

In addition, our research has expanded to include a core climate and housing policy focus. Climate policy and housing policy have an enormous impact on each other, from reducing pollution through decarbonization and infill development to densification efforts in climate havens. We saw that policymakers, advocates, and practitioners needed evidence based research that bridged both areas. We answered by founding a dedicated research area of focus that addresses these issues and more.

The 1949 Housing Act was passed with help from Catherine Bauer, who is the namesake of Bauer Wurster Hall, where the College of Environmental Design sits on campus; and, where the Terner Center was started. Our staff and students are working at the forefront of the housing crisis in California and nationally, with the aim of finally achieving Bauer’s goal: to house families from all walks of life in vibrant, sustainable, and affordable homes and communities. I am excited to share this year’s updates with you.

BEN METCALF
Managing Director



OUR PROJECTS had a major impact on several pieces of key legislation passed in 2023 and 2024. In December 2022, we began talks with State Senator Scott Wiener’s office and housing stakeholders to discuss updating and extending SB 35, which was intended to help shorten the approval process for affordable housing. In our research paper **Streamlining Multifamily Housing Production in California: Progress Implementing SB 35**, we found that over 18,000 affordable units were either approved or pending approval between 2018 and 2021 as a result of SB 35, and that the law had meaningfully removed obstacles to getting affordable housing approved, allowing them to be built faster and cheaper. We took our findings to the state legislature, which used it as a basis to advance SB 423, the continuation of SB 35. SB 423 was signed into law in August 2023, and included some of our recommendations to increase its impact.

“**SB4 not only has the potential to unlock meaningful amounts of new land for projects, but also land in key places that would otherwise be difficult to build.**”

SF CHRONICLE OP-ED

David Garcia, Quinn Underriner & Muhammad Alameldin

ANOTHER MAJOR legislative win came with the state’s efforts to make it easier to build affordable housing on church lands. Earlier attempts had failed to pass the legislative cycle three times. As a continuation of **previous Turner work** – where we identified around 38,000 acres of developable land owned by faith-based organizations (FBOs)—we published **The Housing Potential for Land Owned by Faith-Based Organizations and Colleges**, in which we identified over 171,000 acres of land owned by FBOs and nonprofit colleges that could be used for developing affordable housing. Our findings informed and motivated the passage of SB 4, a new bill that streamlines the process for interested FBOs and nonprofit colleges who want to build affordable multifamily housing on their land.



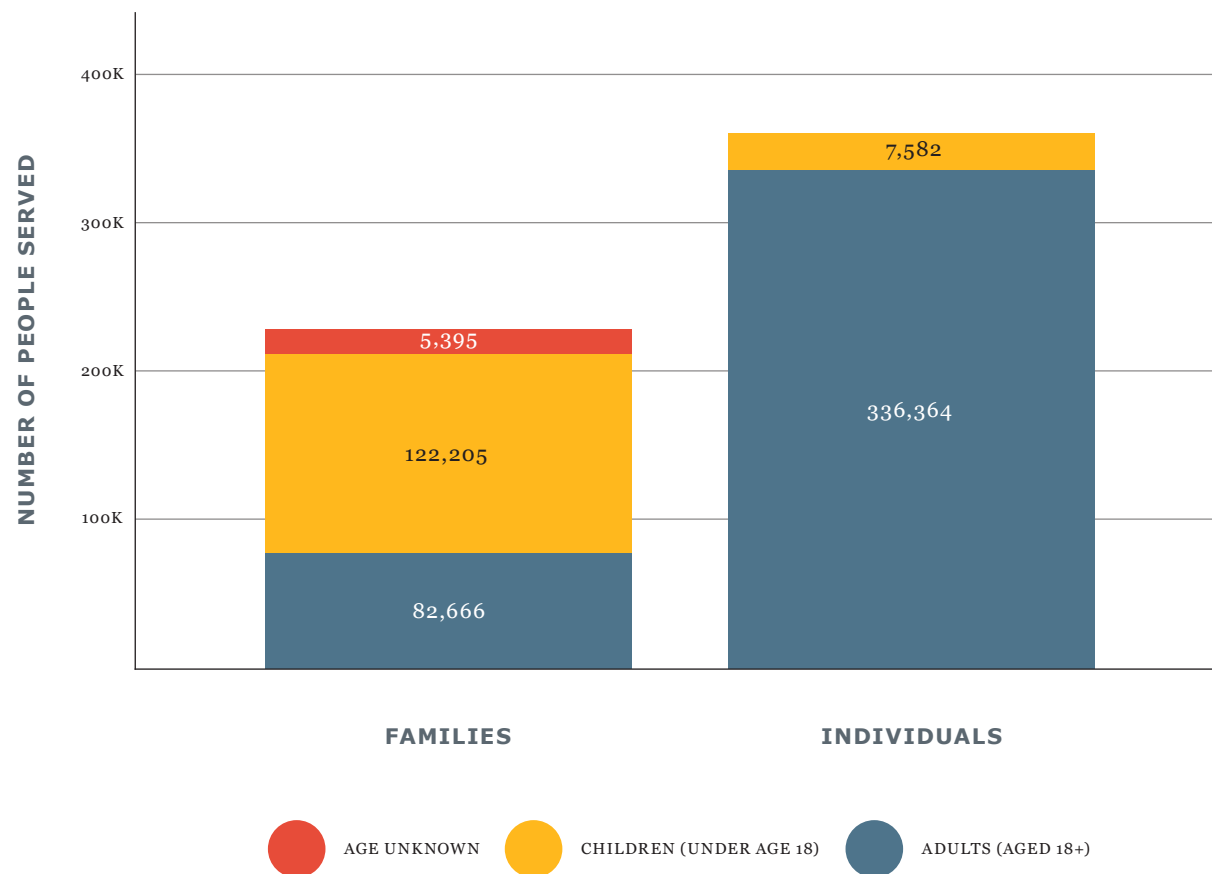
JORDAN COURT

an early example of affordable housing developed on land owned by faith-based organizations

WE ALSO CONTINUED to expand our work on homelessness, responding to the urgent need for evidence-based solutions. California’s homelessness crisis continues to grow: in 2023, over 180,000 people experienced homelessness on a given night. At the core of the crisis is the lack of affordable housing, but addressing homelessness will also require aligning housing and services to provide person-centered care. In partnership with the California Interagency Council on Homelessness, the UCSF Benioff Homelessness and Housing Initiative, and Abt Associates, we published a series of papers elevating key housing and service needs.

NUMBER OF PEOPLE SERVED BY HOMELESS SERVICE AND HOUSING ORGANIZATIONS

Between July 1, 2018 — June 30, 2021



SOURCE: Homeless Data Integration System

Five Recent Trends in Homelessness / October, 2023

This report describes the number and characteristics of people experiencing homelessness in California and documents trends in the available shelter and housing across the state. The patterns presented in the brief underscore the need for sustained resources to address homelessness, equitable service provision, and greater production of affordable housing.

How Homelessness Programs are Serving Four Populations in California / November, 2023

This set of four briefs examines how homelessness programs are serving unaccompanied children, older adults, families with children, and veterans. The briefs present findings on how many people in each population were served by these programs over a three-year study period (2021–2018), their characteristics, and their housing situations at the end of the period.

Stretched to Capacity: The Challenges Facing California’s Homelessness Service Providers / February, 2024

To inform the resources and policies that will enhance nonprofit homelessness organizations’ ability to resolve California’s homelessness crisis, this report presents findings from surveys and interviews with homelessness service providers, as well as interviews with other local homelessness system stakeholders and people with lived experience of homelessness.

EACH OF THESE reports presents new data, including original analysis of the state’s Homeless Data Integration System and results of a statewide service provider survey, as well as interviews with practitioners, policymakers, and people experiencing or with lived experience of homelessness across the state. This research is helping to inform state and local level investments into housing and homelessness programs, and is laying the groundwork for more research into evidence-based solutions.

THIS YEAR, with founding support from the Wells Fargo Foundation, we launched a new research area that addresses the intersection of housing and climate policy. Research at this intersection is long overdue: worsening climate impacts are **disrupting housing markets** sooner than expected, while housing policies—including where and how that housing is built—are critical for reducing climate pollution and increasing community resilience. To set the stage for this new area of work, we published a literature review that **identified research gaps**, highlighting the risk that siloed policymaking could undermine efforts to address both the housing affordability and climate crises. Research and coordinated policy are needed to equitably decarbonize existing homes while protecting renters and low-income households; to proactively plan for climate disasters and make sure that recovery funding is available to renters; and to align climate-friendly land use reforms with affordability, equity, and environmental justice goals. We also published a report illustrating **the importance of infill housing** for reducing carbon pollution, highlighting the overlooked opportunity to build more housing in walkable, job-rich, yet historically exclusionary communities such as Palo Alto.



“**California and our country now have a preeminent center for housing research that we can rely on for quality housing data. Students have a research center they can turn to in order to gain experience and pursue their passion. And, national policymakers and local leaders have a premier research center that can help inform our decision making, provide advice and counsel, and shape the housing policies of the future.**”

U.S Senator Alex Padilla

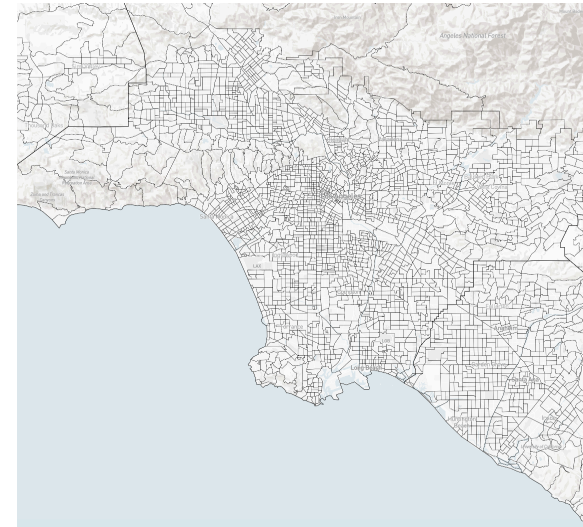
TO CONTINUE our mission to advance fair housing, we partnered with California’s Department of Housing and Community Development (HCD), the Othering and Belonging Institute, and the California Housing Partnership to review and strengthen the state’s approach to Affirmatively Furthering Fair Housing (AFFH). Every year, we help to implement revisions to the state’s **Opportunity Map**, which guides state funding for affordable housing development. The map identifies high-opportunity areas based on indicators including employment rates, high school graduation rates, and poverty levels. This year, we supported the development of a new **Neighborhood Change Map**, which identifies places where significant demographic change has occurred and that show markers of disproportionate housing need (like rising rents). HCD is planning to use this map to advance several AFFH objectives, including advancing racial and economic integration and preventing displacement.

In partnership with the U.S. Department of Housing and Urban Development, we co-hosted the Housing Technology event series with our affiliate nonprofit Turner Labs, which explored the opportunities, risks and challenges present in implementing technology to improve affordability, sustainability and equity in housing. This series of convenings, held across the country, brought together leading housing policy experts, including senior leaders from state and local government as well as the U.S. Environmental Protection Agency, the U.S. Department of Energy, and the White House. It leveraged Turner Center’s research expertise in areas such as **barriers to voucher utilization for low-income families**, **landlord tenant screening practices**, and **barriers to homeownership for people of color**. The events planted seeds for interagency partnerships which we hope will lead to additional resources and energy towards innovative technological solutions to housing challenges.

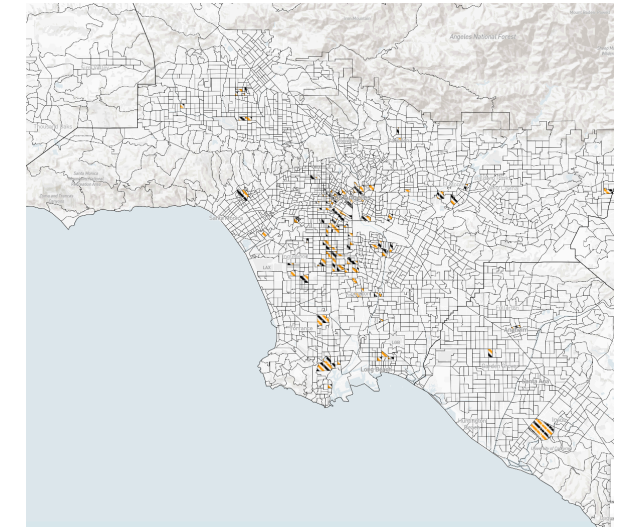
DID YOU KNOW?

The state uses this map as part of the LIHTC scoring process to encourage development in higher opportunity areas.

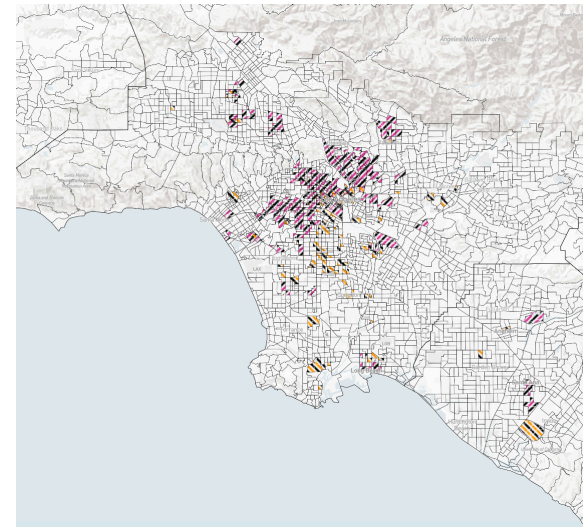
2024 CALIFORNIA OPPORTUNITY MAP



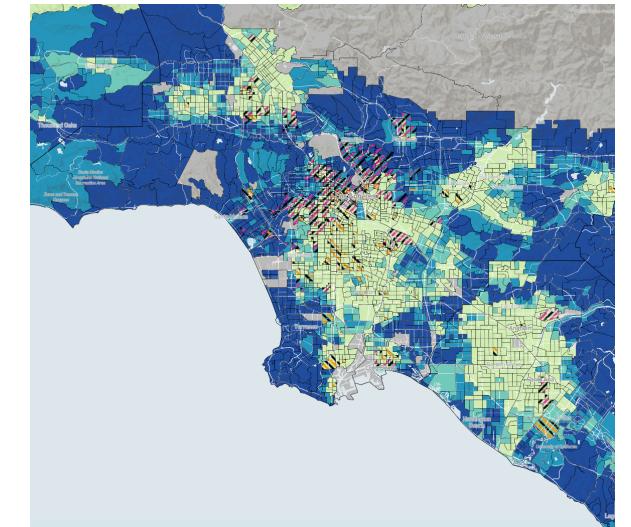
Census tracts in the Los Angeles metro area



The yellow and black stripes indicate areas that meet standards for both high poverty rates and racial segregation



The purple and black stripes indicate areas that have experienced substantial racial and economic demographic change



The final layer shows areas by their resource designation, based on economic, educational, and environmental metrics. The dark blue represents areas identified as “highest resource” and the light green represents areas identified as “low resource”.

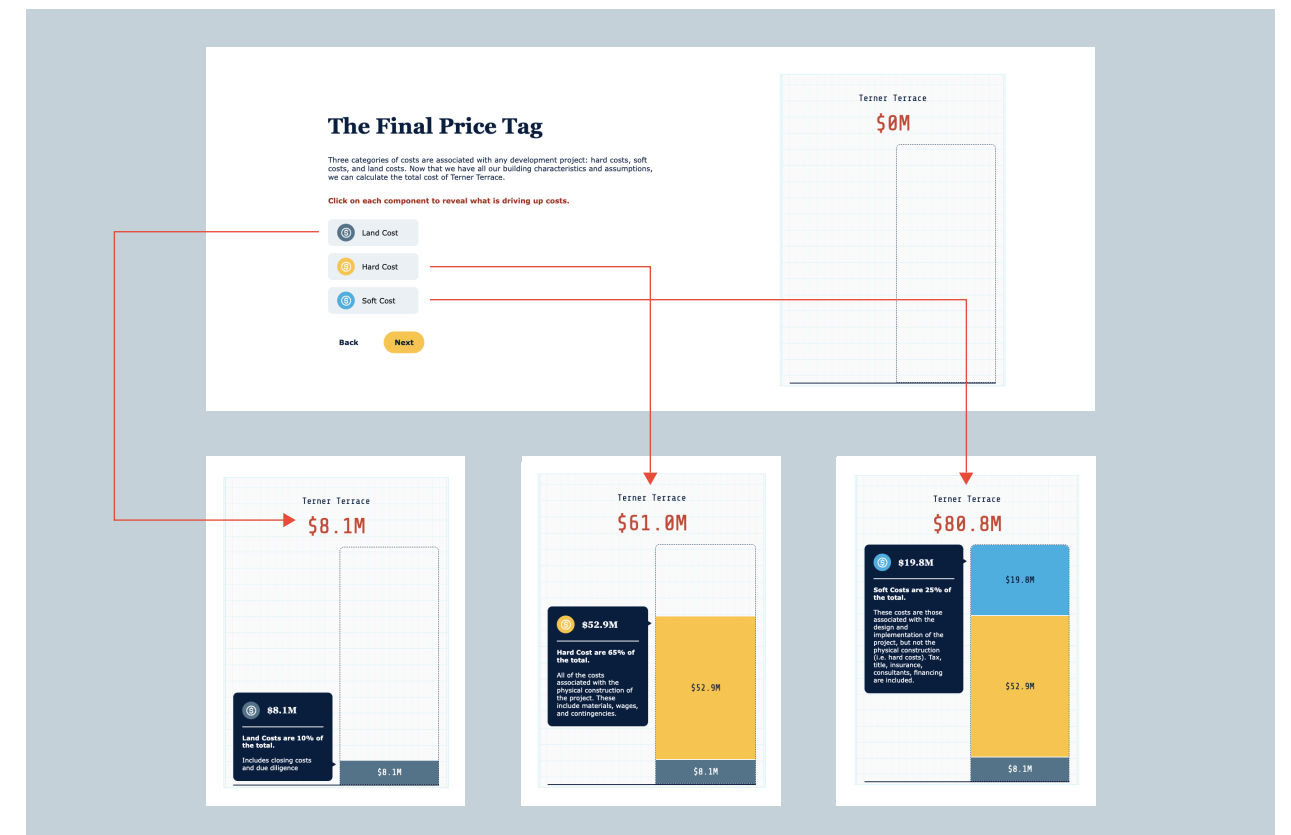
“The Turner Center’s importance as a thought leader in the housing field cannot be overstated, and is emblematic of what UC Berkeley can do: raising the bar for other campus centers taking on impactful work that influences student education, produces rigorous research, and serves campus and community.”

UC Berkeley Chancellor Emerita Carol Christ

4,000+

Our interactive tool, Making It Pencil, has been accessed over 4,000 times since launch

THIS YEAR, we have advanced our efforts to make research more broadly accessible. In partnership with Citizen Codex, we released an **interactive tool** alongside our report, **Making It Pencil: the Math Behind Housing Development**, which explains the financial metrics that underpin whether a project “pencils,” including how financing is obtained and how rents are determined. Building a shared understanding of what it takes to build housing is critical to advancing policies to spur new supply. This brief also updates **our original paper** with cost data based on current market conditions to illustrate how the costs have changed across key regions of California, and the challenges those costs pose to new housing production.



METRICS

150+

media article quotes in publications including the New York Times, the Wall Street Journal, and the San Francisco Chronicle

19

publications including 10 white papers and 9 commentaries or blog posts

1,000+

attendees at 9 webinars and 3 events



DID YOU KNOW?

We have held an average of one webinar or event per month, leading to our largest ever number of webinars in a twelve month period. With an average attendance of nearly 300 people, we have held webinars on topics including permanent supportive housing, California's sliding homeownership ladder, and the management of small multifamily rental properties.

100+

meetings with government representatives, including legislative staff, policymakers, White House officials, and federal government representatives

125+

speaking engagements, presenting on topics ranging from increasing the supply of affordable housing to lessons learned from the Emergency Housing Voucher program

20+

seats on influential advisory committees or policy working groups, including board memberships at several California-based housing groups and state-led advisory panels

6

awarded contracts from state and federal agencies

20+

state and federal policies impacted

2023

IN AUGUST 2023, in partnership with the Hilton Foundation, the NYU Furman Center, and UCLA, we held **From Scarcity to Abundance: Research and Strategies for Housing Policy**, a symposium bringing together researchers, policymakers, and practitioners to discuss issues related to housing supply. We welcomed over 200 people to UCLA to hear from researchers, local advocates, experts, and elected officials. Panels focused on pro housing policies, the impact of new supply on gentrification and affordability, and how land use laws can be used as tools in the housing supply and affordability crisis. The symposium yielded fruitful discussions and conversations and highlighted the importance of bringing together diverse stakeholders to discuss how to advance pro-housing policies that align with affordability and climate goals.



IN DECEMBER, we celebrated Turner Center Founder Carol Galante's retirement with a reception and program in downtown Berkeley. Speakers included California Assemblymember Buffy Wicks, UC Berkeley Chancellor Carol Christ, College of Environmental Design Dean Renee Chow, and prerecorded remarks from US Senator Alex Padilla. Around 100 guests came together to honor Carol and her contributions to the housing field and to Turner.



TOP: Donna Borak, NYU Furman Center (left) and LA Councilmember Nithya Raman speaking at our August symposium

BOTTOM: Housing Venture Lab Director Kara Murray-Badal celebrating Carol Galante's retirement
(Photo Credit: Brittany Hosea-Small)

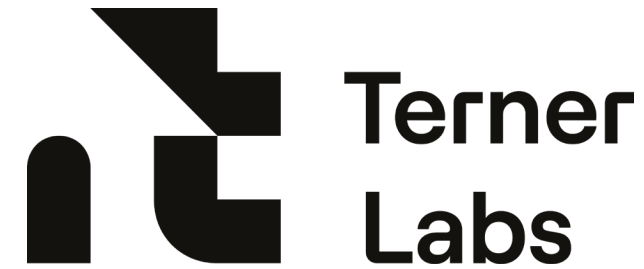
2024

IN APRIL, we welcomed nearly 150 guests to Bauer Wurster Hall on UC Berkeley's campus to discuss what's at stake for housing in the 2024 election. We hosted a lively discussion on topics including the Bay Area regional affordable housing bond on the ballot in November, the potential impacts of White House or congressional transitions, and public opinion data on housing policy efficacy. Panelists included Sarah Brundage, National Association of Affordable Housing Lenders; Graciela Castillo-Krings, Sacramento Advocates; Chris Elmendorf, UC Davis; and Justine Marcus, Enterprise Community Partners.

A KEY PART of our work is mentoring and training the next generation of housing leaders. This year, across the Center and the Labs, we worked with and mentored nineteen UC Berkeley students pursuing degrees in city planning, public policy, and business. Our students have researched and analyzed data relating to **California’s pro-housing designation program**, contributed to internal memos relating to California’s implementation of Affirmatively Furthering Fair Housing, conducted interviews with developers and city planners to better understand impact fee reform, and supported our Housing Venture Lab selection process.



Turner Center & Labs Staff and Graduate Students, May 2024

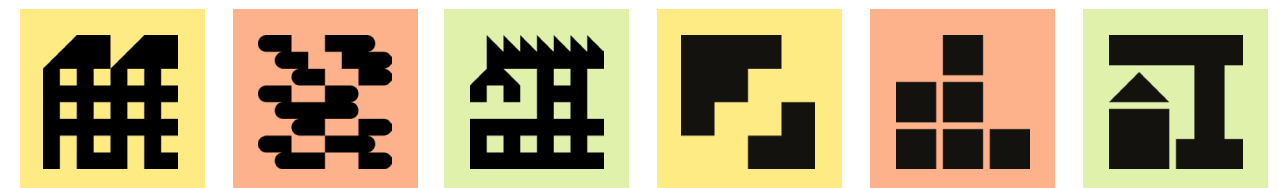


OUR SISTER NONPROFIT, Turner Labs, runs three initiatives designed to spur housing innovation and equitably improve the housing market: the Housing Venture Lab, the Builders Lab, and the Data Solutions Lab. Turner Center and Turner Labs’ work is tightly integrated in multiple ways, from drawing on our research findings to inform the selection of Housing Venture Lab cohort members to leveraging the power of the Housing Policy Simulator to provide data-driven evidence into policy debates.

In a guest paper for the Turner Center, Shane Phillips with the Lewis Center at UCLA used the Turner Housing Policy Simulator to **model inclusionary zoning’s impact** on housing production in Los Angeles. The Simulator, created for the city of Los Angeles by the Data Solutions Lab, helped Shane highlight tradeoffs between increasing inclusionary zoning requirements and housing affordability.

After years of Turner Center research on industrialized construction, Turner Labs launched their **Builders Lab**, a new venture that aims to specifically support early- to middle-stage companies in this sector.

The Labs also underwent a rebrand – [check it out here](#).





Terner Center Staff, Summer 2024

TERNER CENTER FUNDERS

July 2023 to June 2024

GOVERNMENT PARTNERS

California Air Resources Board
California Department of Housing and
Community Development

LEADERS

The James Irvine Foundation
Wells Fargo
Yardi Systems

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The Ballmer Group
Bank of America
California Health Care Foundation
Chan Zuckerberg Initiative
Cooper Housing Institute
Eden Housing
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RAND Corporation
Sares Regis
The San Francisco Foundation
Sobrato Philanthropies
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Sheela Jivan
Gustavo Lamanna and Valerie Lapena
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Alastair MacTaggart
Dave Madan
Alex Mehran
Mercy Housing
Merritt Community Capital Corporation
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RCLCO Real Estate Consulting
Sangchin and Anthony Sertich
Sean and Amelita Spear
William Sternlicht
C. Augusta Stewart

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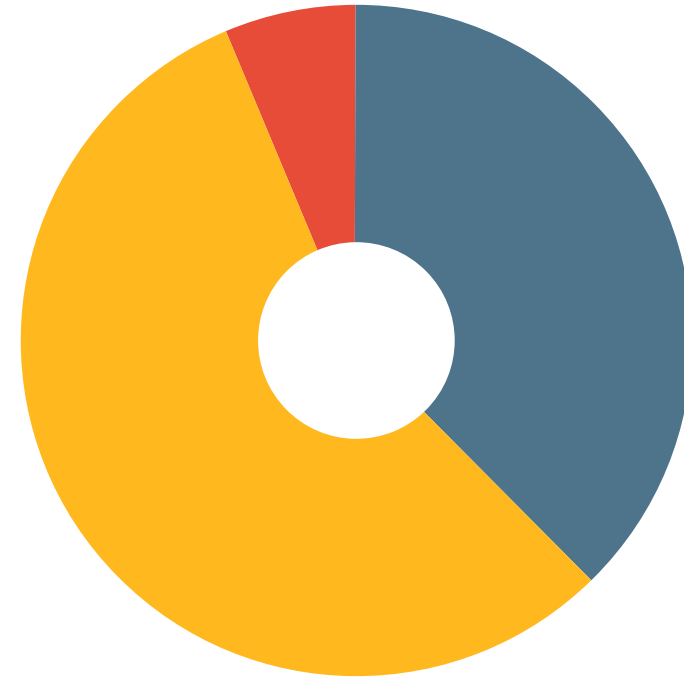
MARK ZANDI

*Chief Economist,
Moody's Analytics*

BUDGET

REVENUE

\$4,852,203



GIFTS: CHAMPIONS & AFFILIATES
\$264,305

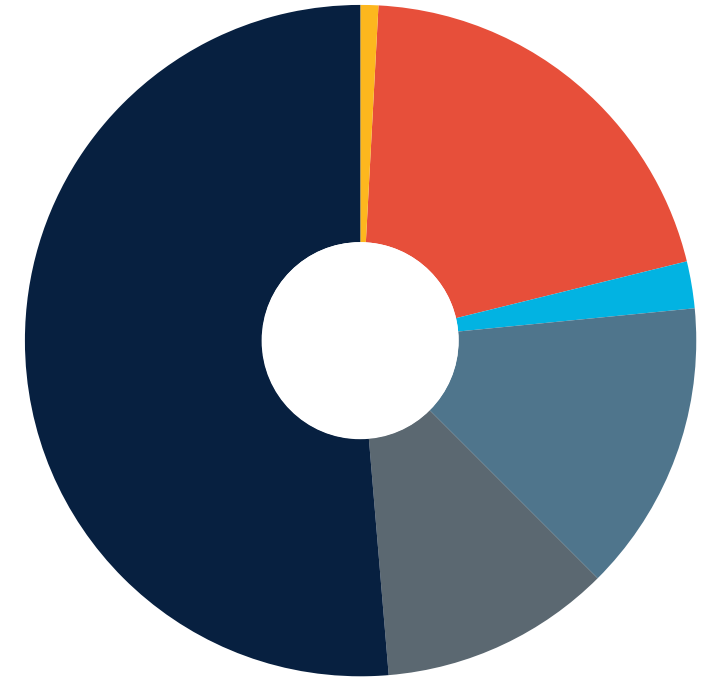
GIFTS: CORPORATIONS & FOUNDATIONS
\$2,525,000

SPONSORED RESEARCH GRANTS
\$2,062,898

BUDGET

EXPENSES

\$4,852,203



PERSONNEL
\$2,518,547

RESEARCH INFRASTRUCTURE & CONSULTANTS
\$494,573

UNIVERSITY & OFFICE OVERHEAD
\$708,761

EVENTS & COMMUNICATIONS
\$172,542

CONTRIBUTIONS TO RESERVES & FUTURE YEAR LIABILITIES
\$923,830

MISCELLANEOUS & CONTINGENCY
\$33,950

The Turner Center for Housing Innovation is a part of UC Berkeley's College of Environmental Design.

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