

SAN FRANCISCO HOMELESSNESS OVERSIGHT COMMISSION

DATA OFFICER REPORT

Homelessness System Trends 2024 vs. 2026

PIT Count & Internal System Data Comparison

Commissioner Guerrero, Data Officer | Regular Meeting, June 4, 2026

All figures cited directly from HSH Director's Reports, PIT Count publications, and Home by the Bay Progress Reports. No external analysis added.

2024 DATA

2026 DATA

▼ DECREASE

▲ INCREASE

⚠ 2026 PIT Count used different counting method than 2024. See slide 2.

Two Data Sources — Not Directly Comparable

BIENNIAL PIT COUNT — ONE NIGHT

- A single-night census conducted every 2 years
- Counts everyone visible as homeless on one night
- 2024: overnight visual count by volunteers
- 2026: early-morning direct engagement — DIFFERENT METHOD
- Most recent: January 2026 (preliminary)
- Full demographics pending summer 2026

ONE SYSTEM DATABASE — FULL YEAR

- Tracks everyone who seeks homeless services all year
- Not a count — a database of service interactions
- **Full-year FY 2024-25 figure: 23,561 people**
- **First-time entries FY 2024-25: 9,552 people**
- No equivalent FY 2023-24 annual figure released
- Commission cannot assess year-over-year trend yet

⚠ 2026 PIT Count changed from overnight visual count to early-morning direct engagement. HSH has not published a bridge analysis. All PIT comparisons are subject to this caveat. [KALW 1/29/26; DR May 2026]

What Each System Recorded: 2024 vs. 2026

PIT COUNT (One Night)

8,323

2024 total counted

[PIT 2024]

▼ 4.2%

7,973

2026 total counted

[DR May 2026]

4,354

2024 unsheltered

[PIT 2024]

▼ 22%

3,400

2026 unsheltered

[DR May 2026]

★ First time: more sheltered than unsheltered on census night (57% sheltered in 2026 vs. 47.7% in 2024)

ONE SYSTEM (Full Year)

2024 Annual Figure

>20,000 estimated
[PIT 2024 report — no annual ONE System figure released]

23,561

FY 2024-25 full-year users

[DR May 2026]

9,552

First-time entries FY 2024-25

[DR May 2026]

⚠ No FY 2023-24 annual ONE System figure has been released. Commission cannot determine if full-year homelessness is rising or falling. This baseline must be formally requested.

Internal System Data: Shelter, Waitlists & Housing Placements

SHELTER OCCUPANCY

2024: 93% (Sept 2024)

[DR Oct 2024]

2026: 90% (Feb 2026)

[DR Feb 2026]

▼ 3 pts

More capacity, lower pressure

ADULT WAITLIST (snapshot)

2024: 152-316 people (late 2024)

[DR Oct & Dec 2024]

2026: 424 people (Feb 2026)

[DR Feb 2026]

▲ 34-179% more waiting

Avg wait: 11 days → 15 days

FAMILY WAITLIST (snapshot)

2024: 498-533 families (late 2024)

[DR Oct & Dec 2024]

2026: 310 families / 896 people (Feb 2026)

[DR Feb 2026]

▼ 38-42%

But PIT family count rose 15% — see slide 6

MONTHLY HOUSING PLACEMENTS

2024: ~201 households (Aug-Oct 2024)

[DR Oct & Dec 2024]

2026: 144 households (Dec 2025)

[DR Feb 2026]

▼ ~28%

Adults, families, youth all declined

STREET TEAM HOUSING CONNECTIONS/MO

2024: 16 households (Oct 2024)

[DR Dec 2024]

2026: 6 households (Nov 2025)

[DR Feb 2026]

▼ 63%

Same # contacts — far fewer outcomes

MONTHLY PREVENTION HOUSEHOLDS

2024: 254-319 households (Aug-Oct 2024)

[DR Oct & Dec 2024]

2026: 146 households (Dec 2025)

[DR Feb 2026]

▼ 43-54%

Prevention fell; 9,552 new entries in FY24-25

Three Contradictions in the City's Own Data

1

⚡ Family census count ▲15% — Family shelter waitlist ▼38-42%

PIT Count found 465 homeless families in 2026 vs. 405 in 2024 [PIT 2024; DR May 2026]

vs.

Family shelter waitlist fell from 498-533 families (late 2024) to 310 families (Feb 2026) [DR Oct & Dec 2024; DR Feb 2026]

→ Where are the additional families? The data does not say.

2

⚡ Street contacts stable (~3,200/mo) — Housing connections ▼63%

SFHOT engaged ~3,200 people per month in Oct 2024 [DR Dec 2024]

vs.

SFHOT connected 6 people to housing in Nov 2025 vs. 16 in Oct 2024 — same contacts [DR Dec 2024; DR Feb 2026]

→ Same outreach effort — dramatically fewer housing outcomes. No explanation in Director's Reports.

3

⚡ Monthly housing placements ▼28% — Problem Solving resolutions ▲127%

Housing placements: ~201/mo (mid-2024) → 144/mo (Dec 2025) [DR Oct & Dec 2024; DR Feb 2026]

vs.

Problem Solving: 177 hhs (Jul-Aug 2024) → 402 hhs (Jul 2025-Jan 2026) [DR Oct 2024; DR Feb 2026]

→ Do these offset each other? Unknown — Commission has no unified exit definition from HSH.

What the Commission Cannot Currently See

NO FY 2023-24 ANNUAL SYSTEM POPULATION



HSH reported 23,561 full-year users (FY 2024-25) but no FY 2023-24 equivalent. Commission cannot assess if year-round homelessness is rising or falling. [DR May 2026]

NO 2026 DEMOGRAPHIC BREAKDOWNS



Race/ethnicity, TGNC share, chronic homelessness, housing stability rate all pending summer 2026. Equity assessment impossible. [DR May 2026]

NO METHODOLOGY BRIDGE ANALYSIS



2026 PIT changed from visual overnight to direct engagement. No analysis published on what this means for the 22% decline. [KALW 1/29/26]

NO FY 2024-25 ANNUAL PREVENTION FIGURE



City served 8,235 through prevention in FY 2023-24. No FY 2024-25 equivalent — even as monthly prevention fell 43-54%. [HbtB Y1; DR Feb 2026]

NO UNIFIED EXIT DEFINITION



Housing placements fell 28%; Problem Solving rose 127%. Do these overlap? Commission has no single exit count for tracking the 30,000-exit goal. [DR Oct 2024; DR Feb 2026]

Commission Questions & Suggested Motions

Q1

Methodology bridge: How much of the 22% unsheltered decline is real vs. counting method?

Motion: Move to request HSH deliver methodology analysis before any policy decisions relying on 2026 PIT are finalized.

Q2

Family census up 15%, waitlist down 38%: Where are these families, and how are they being tracked?

Motion: Move to request a family system status report cross-referencing PIT count, waitlist, and vehicle data.

Q3

Prevention down 43-54%, 9,552 new entries in FY 2024-25: What is the FY 2023-24 entry baseline?

Motion: Move to request FY 2023-24 first-time entry figure and a prevention-to-entry analysis before budget finalized.

Q4

407 PSH units offline and unavailable: What is the unit-level timeline to return them to service?

Motion: Move that units offline 90+ days trigger mandatory HOC progress reports, and request current inventory.