

Memorandum

To: Shawna Purvines, County of El Dorado

From: Matt Kowta, Principal
Nina Meigs, Associate

Date: March 14, 2013

Re: 2035 Growth Projections

Introduction

The County of El Dorado commissioned BAE Urban Economics, Inc. (BAE) to prepare an updated set of housing and employment growth projections, to assist the County in the preparation of an updated Travel Demand Model. The Travel Demand Model will be used to prepare the Traffic Chapter of the Environmental Impact Report (EIR) for the Targeted General Plan Amendment and Comprehensive Zoning Code Update. The updated growth projections cover the western slope of El Dorado County, and covers the period from 2010 to 2035.

General Plan and Zoning Ordinance Amendments With Potential to Influence Growth Rates

County staff provided BAE with information to summarize proposed General Plan and Zoning Ordinance changes that the County is considering. In turn, BAE evaluated the changes and identified the potential changes that may influence the projected growth rates over the next 20 to 25 years. Following is a summary of these potential changes:

Increase residential density

- Policy 2.1.1.3: Consider amending allowable residential density by increasing residential use as a part of Mixed-use Development from 16 units to 20 units per acre.
- Policy 2.2.1.2: Consider amending multi-family density from 24 units per acre to 30 units per acre.
- Policy 2.2.1.2: Consider analyzing the effects of increasing High Density Residential Land Use density from a maximum of 5 units per acre to 8 units per acre.

Reduce policy barriers to commercial and industrial employment in rural areas

- Policy 2.2.1.2: Consider allowing commercial and industrial uses in rural regions.
- Policy 2.2.1.2: Consider deleting the requirement for Industrial lands to be located in or within close proximity to Community Regions and Rural Centers. Delete the requirement that Industrial lands in the Rural Region can only provide for on-site support of agriculture and natural resource uses.
- Policy 8.2.4.2: Consider deleting requirement for special use permit for Agriculture Support Services.

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- Policy 8.2.4.4: Consider amending to allow for ranch marketing activities on grazing lands.
- Policy-various: Increase potential uses to provide additional agricultural support, recreation, home occupation, and other rural residential, tourist-serving, and commercial uses in zones in the Rural Region.

Increase flexibility for mixed-Use developments

- Policy 2.2.1.2: Encourage a full range of housing types including small lot single family detached design without a requirement for Planned Development.
- Policy 2.1.1.3, 2.1.2.5 and 2.2.1.2: Allow up to 15% of the project area in Multi-Family zones for commercial uses as part of a Mixed Use development.
- Policy 2.2.1.2: Consider deleting the sentence, “The residential component of the [mixed use] shall only be implemented following or concurrent with the commercial component.”

Encourage infill

- New Policy Proposed: Set criteria for and identify infill and opportunity areas that will provide incentives substantial enough to encourage the development of these vacant/underutilized areas. This amendment would set criteria for California Environmental Quality Act (CEQA) streamlining opportunities but would not amend current land uses or densities.
- Policy 2.2.3.1: Provide alternative means to open space requirement as part of a planned development to provide more flexibility and incentives for infill development and focus on built recreation options in the Community Regions and Rural Centers.

Other

- Policy TC-1y: Consider analyzing the potential for deleting the El Dorado Hills Business Park employment cap limits.

The overall effect of these proposed changes is to increase the number of locations where development of different types would be allowed within the County, and to increase the flexibility to plan and develop residential and commercial uses within the County. Although these changes would not be expected to fundamentally change the County’s competitive position to capture a share of regional growth over the next 20 to 25 years, the changes could have a marginal impact on where developers choose to accommodate demand for residential and non-residential development within different sub-areas of the County over the projection period.

Base Year Housing and Employment Estimates

It is necessary to establish a starting-point for the projections exercise. This is made challenging by the fact that the projections cover only the western slope of the county (i.e., the area outside of the Lake Tahoe Basin, which is under the jurisdiction of the Tahoe Regional Planning Agency). Outside of the Sacramento Area Council of Governments (SACOG), no government agency compiles data specifically for the portion of the County on the western slope. Even SACOG has limited information on the housing and employment within this area. Table 1 provides estimates of 2010 population and housing within this area, as estimated using 2010 Census data approximated for the area by using aggregations of Census block groups. Table 1 provides an estimate of the 2010 employment in this area using an

aggregation of SACOG Traffic Analysis Zone (TAZ)-level estimates from 2008 and projections for 2014.

Table 1: Baseline Conditions, West Slope, Less City of Placerville

	<u>2010</u>
Population (a)	139,941
Housing Units (a)	59,668
Employment (b)	32,597

Notes:

(a) Based on 2010 Census. El Dorado countywide population, minus population in census tracts located in Tahoe Basin, minus City of Placerville. Tahoe Basin is defined by census tracts 302, 303.01, 303.02, 304.01, 304.02, 305.02, 305.04, 305.05, 316, 320, 9900.

(b) Based on Draft SACOG TAZ-level employment estimates for 2008 and projections for 2014, for El Dorado County West Slope, less employment in City of Placerville area. Assumes constant average annual rate of growth between 2008 and 2014, to estimate 2010 employment.

Sources: U.S. Census, 2010; SACOG, 2012; BAE, 2012.

As shown on Table 1, it is estimated that the West Slope, less Placerville, had 139,941 residents, 59,668 housing units, and 32,597 jobs, as of 2010.

Residential Growth Projections

Table 2 presents residential growth projections for El Dorado County as a whole and for the West Slope, from the California State Department of Finance (DOF), from SACOG, and a third set of projections that are based on historic construction trend data furnished by El Dorado County. Due to differences in methodology and geography inherent in the source data, these three sets of projections offer distinct estimates of future growth in El Dorado County. By setting the three sets of projections side by side, Table 2 depicts a range of growth scenarios and provides the information needed to develop one single reasonable growth trend, upon which the rest of the report's calculations are based.

More specifically, DOF projects that overall countywide population will increase by about 67,700 people between 2010 and 2035, including growth in the Tahoe basin. This equates to a 1.28 percent average annual growth rate for the time period.

For the West Slope, less the City of Placerville, the SACOG growth projections indicate residential housing unit growth of 10,500 units during the 2010 to 2035 time frame, for an average annual growth rate of 0.72 percent.

As shown in the lower part of the table, a residential growth projection that is based on a continuation of the County's historic West Slope residential growth trend over the 2010 to 2035 time period yields an average annual growth rate of 1.03 percent. This is based on building permit data compiled by El Dorado County (see Appendix A). As this estimate falls in the middle of the range between the DOF and SACOG residential growth rates, this growth trend has been deemed a reasonable basis to project residential growth through 2035. Table 2 further assumes that the 2010 West Slope residential vacancy rate will prevail, and that the number of occupied housing units will therefore track the growth in residential units over time. Finally, Table 2 assumes that the 2010 average household size will remain the same, yielding estimates of the growth in West Slope residential population through 2035.

Table 2: Projected Residential Growth Rates, 2010 to 2035

	Base	Projection					Avg. Ann. Growth
	2010	2015	2020	2025	2030	2035	2010-2035
CA Department of Finance Projection							
Countywide Population	180,921	184,195	203,095	220,384	234,485	248,623	1.28%
SACOG Projection							
SACOG West Slope Housing Units, Less Mkt. Area 4	53,429		56,972	59,297		63,955	0.72%
2000-2011 Growth Trend, Excluding Placerville							
West Slope Housing Units (a)	59,668	62,803	66,102	69,575	73,230	77,077	1.03%
Vacancy Rate (b)	7.98%	7.98%	7.98%	7.98%	7.98%	7.98%	
Occupied Housing Units	54,904	57,788	60,824	64,020	67,383	70,923	
West Slope Population (c)	139,941	147,360	155,102	163,251	171,827	180,854	

Note:

(a) This projection is for the West Slope, less City of Placerville, starting from Census 2010 housing unit estimate (See Table 1). Assumes constant average annual rate of growth from 2010 through 2035, based on average annual rate of of new units permitted between 2000 and 2011, applied to 2010 base. The resulting annual average growth rate is applied for each subsequent year, through 2035. Actual new units in any given year may vary from projections due to economic fluctuations and other factors; however, the overall average annual growth rate is assumed to be valid over the 2010 to 2035 time period.

(b) Assumes 2010 Census vacancy rate remains constant.

(c) Assumes 2010 Census average persons per occupied housing unit remains constant.

2.55 persons per occupied housing unit

Sources: Ca. Dept. of Finance, 2013; SACOG, 2012; County of El Dorado, 2012; BAE, 2013.

Residential Growth Allocations Within the West Slope of El Dorado County

The next step in the residential growth projections process was to allocate the total growth projected for the West Slope to the various sub-county Market Areas defined by El Dorado County for planning purposes. Figure 1 shows the boundaries of the 14 different El Dorado County Market Areas. Note that Market Area 12 represents the portion of El Dorado County that lies east of the Sierra Crest and therefore in the Lake Tahoe Basin, which is excluded from this analysis. Note also that Market Area 4 encompasses the City of Placerville. Since the purpose of these calculations is to estimate growth projections for the unincorporated County, in most cases the reported Market Area 4 figures reflect only the growth projected for areas that are outside of Placerville's current city limits. Exceptions are clearly noted in table footnotes.

Growth allocations within the West Slope area are done based on the distribution of new development in El Dorado County over the 2000 to 2011 time period. These historic trends are summarized in Appendix A for residential development. It should be noted that there were a number of issues that constrained the development pattern within the County during the first half of the 2000-2011 time period for which the historic trend data was analyzed. This included legal restrictions on development due to environmental issues relating to rare plant species. In addition, the alignment for the Diamond Springs Parkway was not resolved until 2011. In order to test for the possible effect of changes in the development pattern due to the lifting of these constraints, County staff provided BAE with data on development application activity from 2006 through the present, which indicated that, if anything, the trend since that time has shown even greater interest in developing within Market Areas 1 and 2 than indicated by the longer term historic trend. However, this may have been the result of pent up demand due to the constraints in the prior period; thus, the historic trend in development is used as the first step in allocating countywide demand for new development.

Table 3 calculates the increase in the number of housing units in each Market Area, during each time frame. These figures are not cumulative. In other words, for Market Area 1, the model projects an increase of 861 housing units between 2010 and 2015. Then the model projects an increase of 906 housing units between 2015 and 2020. The total number of new housing units in Market Area 1 between 2010 and 2020 is thus 1,767 (861+906).

Table 3 also splits housing units between single-family units and multifamily units, in a two-step process. First, it is assumed that the split of new units between 2010 and 2035 will be similar to the split in units permitted between 2000 and 2011, in areas which currently have capacity to accommodate multifamily units, which was 10.3 percent of all units built in those areas. However, if a given Market Area does not have sufficient capacity on land designated for multifamily units to accommodate the full 10.3 percent for the entire period, then the multifamily units assigned to the area are capped at the maximum capacity, and those multifamily units are assumed to be absorbed in a nearby Market Area that has capacity. In the Market Areas which have no multifamily residential capacity, zero multifamily residential units have been assigned.

Table 3: Projected Residential Growth, West Slope of El Dorado County, 2010-2035

	<u>2010</u>	<u>2015</u>	<u>2020</u>	<u>2025</u>	<u>2030</u>	<u>2035</u>
Total Housing Units	59,668	62,803	66,102	69,575	73,230	77,077

New Housing Units Each Period

<u>Market Area (a)</u>	<u>Incremental Growth from Prior 5 Years</u>					<u>Total</u>
	<u>2015</u>	<u>2020</u>	<u>2025</u>	<u>2030</u>	<u>2035</u>	
#1 - El Dorado Hills	861	906	954	1,004	1,057	4,781
<i>Single-family Units</i>	772	812	855	973	1,057	4,469
<i>Multifamily Units</i>	89	94	99	31	0	312
#2 - Cameron Park/Shingle Springs	755	795	837	881	927	4,195
<i>Single-family Units</i>	677	713	750	717	702	3,560
<i>Multifamily Units</i>	78	82	86	164	225	635
#3 - Diamond Springs	164	172	181	191	201	909
<i>Single-family Units</i>	147	155	163	171	180	815
<i>Multifamily Units</i>	17	18	19	20	21	94
#4 - Unincorporated Placerville Area	82	86	90	95	100	454
<i>Single-family Units</i>	73	77	81	85	70	387
<i>Multifamily Units</i>	8	9	9	10	30	67
#5 - Coloma/Gold Hill	166	175	184	193	204	921
<i>Single-family Units</i>	166	175	184	193	204	921
<i>Multifamily Units</i>	0	0	0	0	0	0
#6 - Pollock Pines	203	214	225	237	250	1,129
<i>Single-family Units</i>	182	172	178	188	218	938
<i>Multifamily Units</i>	21	42	47	50	32	191
#7 - Pleasant Valley	208	219	230	243	255	1,155
<i>Single-family Units</i>	186	216	230	243	255	1,131
<i>Multifamily Units</i>	21	3	0	0	0	24
#8 - Latrobe	17	18	19	20	21	94
<i>Single-family Units</i>	17	18	19	20	21	94
<i>Multifamily Units</i>	0	0	0	0	0	0
#9 - Somerset	125	131	138	145	153	692
<i>Single-family Units</i>	125	131	138	145	153	692
<i>Multifamily Units</i>	0	0	0	0	0	0
#10 - Cool/Pilot Hill	166	175	184	194	204	924
<i>Single-family Units</i>	166	175	184	194	204	924
<i>Multifamily Units</i>	0	0	0	0	0	0
#11 - Georgetown/Garden Valley	245	258	271	286	301	1,361
<i>Single-family Units</i>	245	258	271	286	301	1,361
<i>Multifamily Units</i>	0	0	0	0	0	0
#12 - Tahoe Basin	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
<i>Single-family Units</i>	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
<i>Multifamily Units</i>	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
#13 - American River	91	95	100	106	111	503
<i>Single-family Units</i>	91	95	100	106	111	503
<i>Multifamily Units</i>	0	0	0	0	0	0
#14 - Mosquito	52	55	58	61	64	291
<i>Single-family Units</i>	52	55	58	61	64	291
<i>Multifamily Units</i>	0	0	0	0	0	0
Total	3,135	3,299	3,473	3,655	3,847	17,409

Notes:

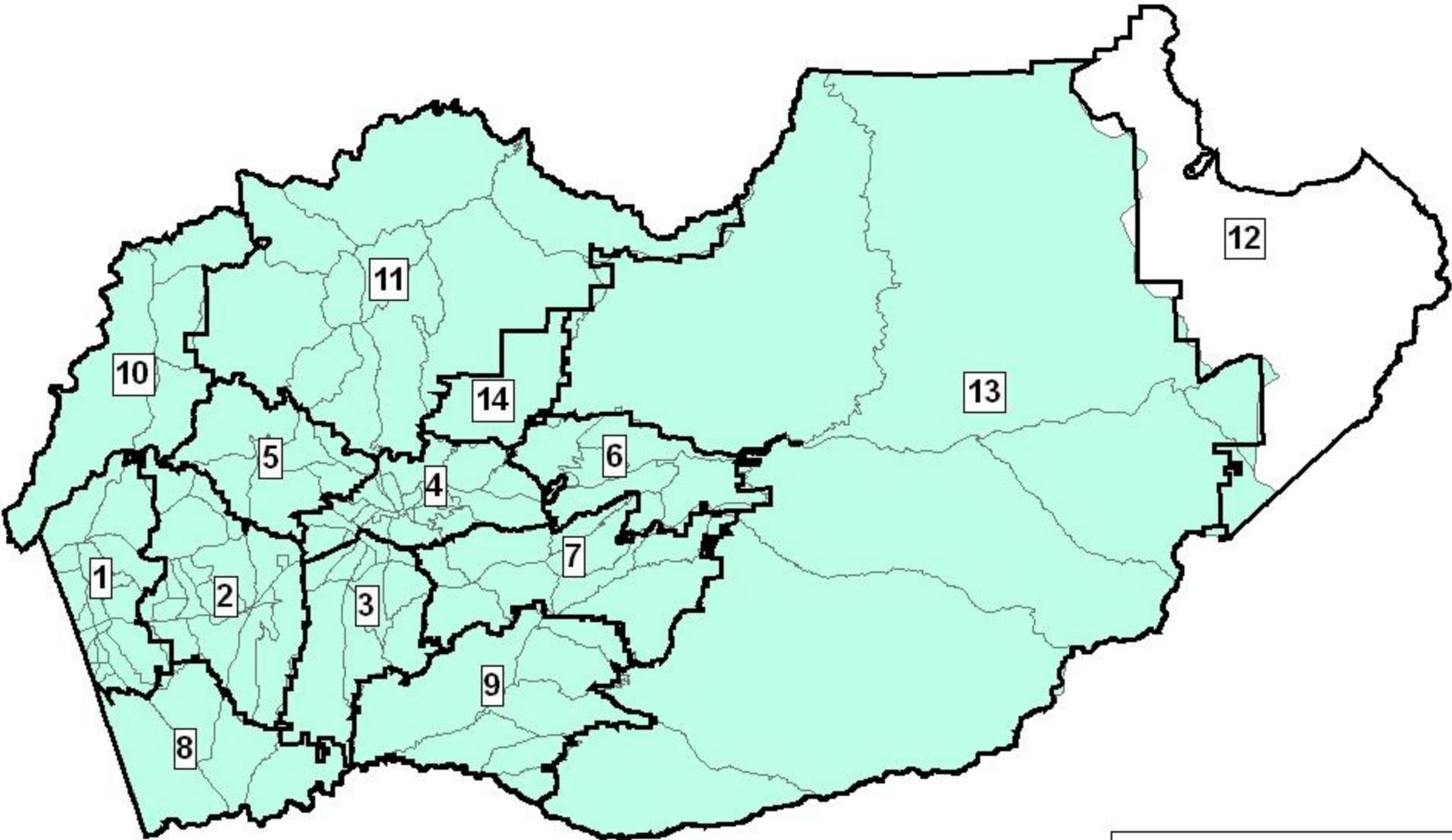
Figures in columns may not sum to totals due to rounding.

For the geographic boundaries of the various Market Areas, please refer to Figure 1 on page 9.

(a) Projected overall growth is allocated to Market Areas based on each Market Area's proportionate share of West Slope, less City of Placerville growth from 2000 to 2011. See Appendix A.

Sources: El Dorado County, BAE, 2013.

Figure 1
El Dorado County Market Areas and SACOG TAZ Boundaries



Legend

- Market Area Boundaries
- SACOG TAZ Boundaries

Non-Residential Growth Allocations Within the West Slope of El Dorado County

This set of employment projections follows the same general methodology as that used to prepare the 2002 El Dorado County growth projections. That is, it assumes that an overall relationship between housing growth and job growth will prevail through 2035, which is expressed in terms of the ratio between jobs and housing in a given area. Due to the West Slope's varied geography and the diverse range of communities found there, jobs/housing ratios vary significantly from Market Area to Market Area, with those located closer to Sacramento, and closer to the County's major transportation corridor (Highway 50) tending to have the highest jobs/housing ratios, and those more isolated communities tending to have the lower jobs/housing ratios. The non-residential growth projections assume that as residential growth proceeds in the West Slope area, the increase in jobs will track the increase in housing, based on each Market Area's jobs/housing ratio.

Table 4 is the first step in calculating the projected job growth. For each Market Area, Table 4 shows the anticipated jobs/housing ratio for the increment of new residential and non-residential growth, according to SACOG's latest regional projections. The jobs/housing ratios are based on the projected number of new households (equal to the number of new occupied housing units) and the projected number of new jobs. Note that, since SACOG's projections differ from the growth projections assumed in Table 3, only the jobs/housing ratio calculated in Table 4 is incorporated into the non-residential growth calculations in Tables 5 and 6, not SACOG's absolute projected growth figures or SACOG's projected rate of growth. These jobs/housing ratios are used only to establish the future relationship between anticipated population growth and anticipated job growth.

The upper part of Table 5 then translates the new housing unit growth by Market Area from Table 3 into an estimate of new occupied housing units, assuming the same overall housing vacancy rate from the 2010 Census. Then, the lower part of Table 5 projects the overall increase in jobs in each Market Area assuming that the jobs/housing ratios from Table 4 apply through 2035.

Finally, Table 6 breaks out the overall job growth in each Market Area, from Table 5, into various land use sectors. These assume the same percentage allocation of jobs to different sectors as projected in SACOG's latest regional forecast; however, they are keyed to the Table 5 job increase numbers, which are linked to the projected residential growth from Table 2, rather than to SACOG's overall employment projections for the area.

Table 4: Projected New Jobs to New Household Ratios, by Market Area, 2008 - 2035

Market Area	New Households	New Jobs	Jobs to Housing
	2008 - 2035	2008 - 2035	Ratio
#1 - El Dorado Hills	5,340	9,532	1.79
#2 - Cameron Park/ Shingle Springs	4,259	4,498	1.06
#3 - Diamond Springs	890	1,264	1.42
#4 - Placerville Area	1,348	1,818	1.35
#5 - Coloma/Gold Hill	62	82	1.32
#6 - Pollock Pines	42	0	0.00
#7 - Pleasant Valley	157	83	0.53
#8 - Latrobe	n.a.	n.a.	n.a.
#9 - Somerset	43	0	0.00
#10 - Cool/Pilot Hill	36	0	0.00
#11 - Georgetown/Garden Valley (a)	-88	-12	0.14
#12 - Tahoe Basin	n.a.	n.a.	n.a.
#13 - American River	187	4	0.02
#14 - Mosquito	122	12	0.10

Notes:

For the geographic boundaries of the various Market Areas, please refer to Figure 1 on page 9.

Table 4 excludes the Tahoe Basin but includes the City of Placerville.

(a) Reflects SACOG projections of declining population and jobs in TAZs associated with Market Area 11. Negative figures do not affect overall growth projections, as only the resulting jobs/housing ratios are used for the purposes of the growth projections.

Source: SACOG, 2012.

Table 5: Projected New Jobs by Market Area, 2010-2035

Market Area	New Households (i.e., occupied units) Each Period (a)					Total
	2015	2020	2025	2030	2035	
#1 - El Dorado Hills	792	834	878	924	972	4,400
#2 - Cameron Park/ Shingle Springs	695	732	770	811	853	3,860
#3 - Diamond Springs	151	159	167	176	185	837
#4 - Unincorporated Placerville Area	75	79	83	88	92	417
#5 - Coloma/Gold Hill	153	161	169	178	187	848
#6 - Pollock Pines	187	197	207	218	230	1,039
#7 - Pleasant Valley	191	201	212	223	235	1,063
#8 - Latrobe	16	16	17	18	19	87
#9 - Somerset	115	121	127	134	141	637
#10 - Cool/Pilot Hill	153	161	170	178	188	850
#11 - Georgetown/Garden Valley	225	237	250	263	277	1,252
#12 - Tahoe Basin	n.a.	n.a.	n.a.	n.a.	n.a.	0
#13 - American River	83	88	92	97	102	463
#14 - Mosquito	48	51	53	56	59	267
Total	2,885	3,036	3,196	3,363	3,540	16,020

Market Area (a)	New Jobs Each Period (b)					Total
	2015	2020	2025	2030	2035	
#1 - El Dorado Hills	1,414	1,488	1,567	1,649	1,735	7,853
#2 - Cameron Park/ Shingle Springs	734	773	813	856	901	4,077
#3 - Diamond Springs	214	225	237	250	263	1,188
#4 - Unincorporated Placerville Area	101	107	112	118	124	563
#5 - Coloma/Gold Hill	202	212	224	235	248	1,121
#6 - Pollock Pines	0	0	0	0	0	0
#7 - Pleasant Valley	101	106	112	118	124	561
#8 - Latrobe (c)	22	23	24	25	27	121
#9 - Somerset	0	0	0	0	0	0
#10 - Cool/Pilot Hill	0	0	0	0	0	0
#11 - Georgetown/Garden Valley	31	33	35	36	38	174
#12 - Tahoe Basin	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
#13 - American River	8	9	9	10	10	46
#14 - Mosquito	67	71	74	78	82	373
Total	2,895	3,047	3,207	3,376	3,553	16,078

Notes:

Figures in columns may not sum to totals due to rounding.

For the geographic boundaries of the various Market Areas, please refer to Figure 1 on page 9.

(a) Converts new housing units from Table 3 into new households assuming 7.98 percent average vacancy rate, from Table 2.

(b) Projects new jobs based on SACOG's projected ratio of new jobs to new households, from Table 4.

(c) Due to an anomaly in SACOG's projections for Market Area 8, BAE utilized the average jobs/housing ratio from all other market areas to estimate the Market Area 8 job growth.

Sources: U.S. Census, 2010; SACOG, 2012; El Dorado County, 2012; BAE, 2013.

Table 6: New Jobs, by Sector

Market Area	Education Sector					Office Sector				
	10 to 15	15 to 20	20 to 25	25 to 30	30 to 35	10 to 15	15 to 20	20 to 25	25 to 30	30 to 35
#1 - El Dorado Hills	35	37	39	41	43	822	866	911	959	1,009
#2 - Cameron Park/Shingle Springs	58	61	64	68	71	71	75	78	83	87
#3 - Diamond Springs	(1)	(1)	(1)	(1)	(1)	32	34	36	38	40
#4 - Unincorporated Placerville Area	2	2	2	2	2	22	23	24	26	27
#5 - Coloma/Gold Hill	-	-	-	-	-	62	66	69	73	76
#6 - Pollock Pines	-	-	-	-	-	-	-	-	-	-
#7 - Pleasant Valley	3	3	3	4	4	9	10	10	11	11
#8 - Latrobe	-	-	-	-	-	7	7	7	8	8
#9 - Somerset	-	-	-	-	-	-	-	-	-	-
#10 - Cool/Pilot Hill	-	-	-	-	-	-	-	-	-	-
#11 - Georgetown/Garden Valley	-	-	-	-	-	8	9	9	9	10
#12 - Tahoe Basin	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
#13 - American River	3	4	4	4	4	3	4	4	4	4
#14 - Mosquito	-	-	-	-	-	17	18	19	20	21
Total	100	105	111	117	123	1,055	1,110	1,168	1,230	1,294

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Notes:

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For the geographic boundaries of the various Market Areas, please refer to Figure 1 on page 9.

Sources: SACOG, TAZ-level growth projections (2008-2035), 2012; BAE, 2012.

Table 6: New Jobs, by Sector (continued)

Market Area	Retail Sector					Service Sector				
	10 to 15	15 to 20	20 to 25	25 to 30	30 to 35	10 to 15	15 to 20	20 to 25	25 to 30	30 to 35
#1 - El Dorado Hills	136	143	151	159	167	137	144	151	159	168
#2 - Cameron Park/Shingle Springs	374	394	415	436	459	162	170	179	188	198
#3 - Diamond Springs	71	75	79	83	87	63	67	70	74	78
#4 - Unincorporated Placerville Area	28	30	31	33	35	37	39	41	43	45
#5 - Coloma/Gold Hill	15	16	17	17	18	10	10	11	12	12
#6 - Pollock Pines	-	-	-	-	-	-	-	-	-	-
#7 - Pleasant Valley	39	41	43	45	48	37	39	41	44	46
#8 - Latrobe	3	3	3	3	3	2	2	2	2	2
#9 - Somerset	-	-	-	-	-	-	-	-	-	-
#10 - Cool/Pilot Hill	-	-	-	-	-	-	-	-	-	-
#11 - Georgetown/Garden Valley	8	8	8	9	9	14	15	16	17	18
#12 - Tahoe Basin	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
#13 - American River	1	1	1	1	1	1	1	1	1	1
#14 - Mosquito	16	17	18	19	20	31	32	34	36	38
Total	691	727	765	805	848	493	519	546	575	605

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Notes:

Figures in columns may not sum to totals due to rounding.

For the geographic boundaries of the various Market Areas, please refer to Figure 1 on page 9.

Sources: SACOG, TAZ-level growth projections (2008-2035), 2012; BAE, 2012.

Table 6: New Jobs, by Sector (continued)

Market Area	Medical Sector					Industrial Sector				
	10 to 15	15 to 20	20 to 25	25 to 30	30 to 35	10 to 15	15 to 20	20 to 25	25 to 30	30 to 35
#1 - El Dorado Hills	161	170	179	188	198	123	129	136	143	151
#2 - Cameron Park/Shingle Springs	14	15	15	16	17	56	58	61	65	68
#3 - Diamond Springs	8	8	9	9	10	40	42	44	47	49
#4 - Unincorporated Placerville Area	7	7	8	8	9	6	6	6	7	7
#5 - Coloma/Gold Hill	5	5	6	6	6	110	115	121	128	135
#6 - Pollock Pines	-	-	-	-	-	-	-	-	-	-
#7 - Pleasant Valley	4	4	4	4	4	9	9	10	10	11
#8 - Latrobe	1	1	1	1	1	11	11	12	12	13
#9 - Somerset	-	-	-	-	-	-	-	-	-	-
#10 - Cool/Pilot Hill	-	-	-	-	-	-	-	-	-	-
#11 - Georgetown/Garden Valley	1	1	1	1	2	-	-	-	-	-
#12 - Tahoe Basin	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
#13 - American River	-	-	-	-	-	-	-	-	-	-
#14 - Mosquito	3	3	3	3	3	-	-	-	-	-
Total	203	214	225	237	249	353	372	391	412	433

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Notes:

Figures in columns may not sum to totals due to rounding.

For the geographic boundaries of the various Market Areas, please refer to Figure 1 on page 9.

Sources: SACOG, TAZ-level growth projections (2008-2035), 2012; BAE, 2012.

Table 6: New Jobs, by Sector (continued)

Market Area	Total, All Sectors					Total
	10 to 15	15 to 20	20 to 25	25 to 30	30 to 35	10 to 35
#1 - El Dorado Hills	1,414	1,488	1,567	1,649	1,735	7,853
#2 - Cameron Park/Shingle Springs	734	773	813	856	901	4,077
#3 - Diamond Springs	214	225	237	250	263	1,188
#4 - Unincorporated Placerville Area	101	107	112	118	124	563
#5 - Coloma/Gold Hill	202	212	224	235	248	1,121
#6 - Pollock Pines	-	-	-	-	-	-
#7 - Pleasant Valley	101	106	112	118	124	561
#8 - Latrobe	22	23	24	25	27	121
#9 - Somerset	-	-	-	-	-	-
#10 - Cool/Pilot Hill	-	-	-	-	-	-
#11 - Georgetown/Garden Valley	31	33	35	36	38	174
#12 - Tahoe Basin	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
#13 - American River	8	9	9	10	10	46
#14 - Mosquito	67	71	74	78	82	373
Total	2,895	3,047	3,207	3,376	3,553	16,078

Notes:

Figures in columns may not sum to totals due to rounding.

For the geographic boundaries of the various Market Areas, please refer to Figure 1 on page 9.

Sources: SACOG, TAZ-level growth projections (2008-2035), 2012; BAE, 2012.

Capacity to Accommodate Projected Growth

The last step in the growth projections process was to compare the 2010 to 2035 projected levels of growth with the existing supply of appropriately-zoned vacant land, taking into account existing zoning and parcel assembly patterns. Appendix B estimates the capacity of the existing vacant single-family residential and multifamily residential land in each Market Area to accommodate residential growth. As summarized in Appendix B, there is more than adequate capacity in the available land on an overall basis and within each Market Area to accommodate projected residential growth through 2035. An oversupply of residential and non-residential land use designations in order to provide market and landowner flexibility to more feasibly accommodate the market is an identified General Plan objective.

Appendix C compares the number of currently vacant acres zoned for job-generating uses with estimates of the acreage that would be required to accommodate the projected 2010–2035 demand for non-residential development. These estimates rely on job density assumptions and Floor Area Ratio (FAR) assumptions which were developed for different use types, and are outlined in Appendix D. The assumed FARs range between 0.12 and 0.4, depending on land use. Note that the Appendix D calculations further assume that, on average, commercial developments achieve 85 percent of the maximum FAR allowed by zoning regulations. For example, the table assumes that retail land will be built out at 85 percent of the allowed 0.25 FAR, achieving a FAR of 0.2125 in practice.

Appendix D indicates that all Market Areas, with the exception of Market Area 7 and Market Area 14 have sufficient vacant land to accommodate projected growth. In Market Area 7, the estimated land shortfall is about four acres. In Market Area 14, the estimated shortfall is approximately 10 acres. Assuming additional land is not designated to accommodate the projected growth in these two market areas, it is likely that the excess job growth that could not be accommodated on the available land would shift to adjacent Market Areas, such as Market Area 4 and Market Area 6, which both have more than sufficient vacant land to accommodate their projected job growth as well as any excess from Market Areas 7 and 14.

Projection Variance Under the No Project Alternative

The no project alternative assumes that El Dorado County would not enact the proposed targeted General Plan amendments and the Comprehensive Zoning Ordinance Update, and instead leave existing policies in place. As mentioned previously, it is not likely that the proposed General Plan amendments and Zoning Code updates will significantly alter the County's position to compete for a share of regional growth; however, it is possible that the proposed changes would lead to some slight changes in the locations in which developers propose to accommodate growth within the County's various sub-areas, potentially increasing development interest in those Market Areas where the increased flexibility would apply.

Appendix A: Summary of Historic Distribution of Housing Permits, 2000-2011

Market Area	Single Family Units (a) Permitted (2000-2011)	Multifamily Units Permitted 2000-2011	Total Units Permitted 2000-2011	% of West Slope
#1 - El Dorado Hills	1,842	182	2,024	27.5%
#2 - Cameron Park/Shingle Springs	1,538	238	1,776	24.1%
#3 - Diamond Springs	263	122	385	5.2%
#4 - Unincorporated Placerville Area	192	0	192	2.6%
#5 - Coloma/Gold Hill	390	0	390	5.3%
#6 - Pollock Pines	478	0	478	6.5%
#7 - Pleasant Valley	489	0	489	6.6%
#8 - Latrobe	40	0	40	0.5%
#9 - Somerset	293	0	293	4.0%
#10 - Cool/Pilot Hill	391	0	391	5.3%
#11 - Georgetown/Garden Valley	576	0	576	7.8%
#12 - Tahoe Basin	n.a.	n.a.	n.a.	n.a.
#13 - American River	213	0	213	2.9%
#14 - Mosquito	123	0	123	1.7%
Total	6,828	542	7,370	100.0%

Note:

Figures in columns may not sum to totals due to rounding.

For the geographic boundaries of the various Market Areas, please refer to Figure 1 on page 9.

(a) Includes single family homes, two-family homes, manufactured homes, and second dwelling units.

(b) Includes townhouses, apartment units, and condominiums.

Source: El Dorado County permit records, 2012.

Appendix B: Maximum Residential Capacity on Currently Vacant Parcels

Market Area	Outstanding SFR Capacity	Outstanding Multifamily Capacity	Total Outstanding Residential Capacity
#1 - El Dorado Hills	8,033	312	8,345
#2 - Cameron Park/ Shingle Springs	4,660	2,201	6,861
#3 - Diamond Springs	3,870	2,401	6,271
#4 - Unincorporated Placerville Area	941	83	1,024
#5 - Coloma/Gold Hill	925	0	925
#6 - Pollock Pines	1,197	191	1,388
#7 - Pleasant Valley	1,236	24	1,260
#8 - Latrobe	1,275	0	1,275
#9 - Somerset	853	0	853
#10 - Cool/Pilot Hill	2,345	0	2,345
#11 - Georgetown/Garden Valley	2,748	0	2,748
#12 - Tahoe Basin	n.a.	n.a.	n.a.
#13 - American River	1,198	0	1,198
#14 - Mosquito	318	0	318
Total	29,599	5,212	34,811

Notes and exclusions:

Figures in columns may not sum to totals due to rounding.

For the geographic boundaries of the various Market Areas, please refer to Figure 1 on page 9.

1. Excludes Mixed Use residential capacity on commercial lands.
2. Rural Regions analyses is based on vacant residential lands capacities only, additional underutilized capacity exists but is not analyzed.
3. Community Regions analyses is based on draft land use capacity dated 12/1/12, minor adjustments may be expected prior to completion.
4. Camino/Pollock Pines Community Region analysis is based on underlying land uses only, with no parcel specific analyses (performed for Market Area 6).
5. Vacant Rural Region analyses is based on underlying residential land uses on vacant lands without parcel specific constraints analysis. It does not include vacant agricultural lands.
6. Underdeveloped Rural Region analyses is based on underlying land uses without parcel specific constraints analysis and includes partially developed residential lands and vacant agricultural lands.

Source: Kimley-Horn and Associates, Inc., 2012.

Appendix C: Non-Residential Development Capacity

<u>Job Sector</u>	<u>Projected Job Growth 2010 - 2035</u>	<u>New Demand for Building Square Feet (a)</u>	<u>Acres Needed to Meet Demand (b)</u>	<u>Currently Vacant Acres Zoned for Compatible Uses (c)</u>
Market Area 1				
Education	193	125,768	28.3	
Office	4,567	1,255,971	135.7	
Retail	755	377,510	40.8	
Service	759	379,568	41.0	
Medical	896	279,942	30.2	
Industrial	683	682,564	46.1	
Total	7,853	3,101,323	322.1	1,267.6
Market Area 2				
Education	323	209,792	47.2	
Office	393	108,205	11.7	
Retail	2,078	1,038,985	112.2	
Service	898	448,776	48.5	
Medical	77	24,082	2.6	
Industrial	308	308,250	20.8	
Total	4,077	2,138,091	243.0	666.6
Market Area 3				
Education	-4	(2,442)	(0.5)	
Office	180	49,455	5.3	
Retail	395	197,563	21.3	
Service	351	175,612	19.0	
Medical	44	13,793	1.5	
Industrial	222	221,863	15.0	
Total	1,188	655,845	61.6	458.8
Market Area 4				
Education	9	5,635	1.3	
Office	122	33,631	3.6	
Retail	157	78,484	8.5	
Service	204	102,169	11.0	
Medical	39	12,191	1.3	
Industrial	32	31,579	2.1	
Total	563	263,688	27.9	297.8
Market Area 5				
Education	0	-	-	
Office	346	95,163	10.3	
Retail	83	41,526	4.5	
Service	55	27,684	3.0	
Medical	28	8,651	0.9	
Industrial	609	609,042	41.1	
Total	1,121	782,066	59.8	146.5
Market Area 6				
Education	0	-	-	
Office	0	-	-	
Retail	0	-	-	
Service	0	-	-	
Medical	0	-	-	
Industrial	0	-	-	
Total	0	-	-	42.1

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Appendix C: Non-Residential Development Capacity (continued)

Market Area 7				
Education	17	10,984	2.5	
Office	51	13,941	1.5	
Retail	216	108,151	11.7	
Service	208	103,926	11.2	
Medical	20	6,337	0.7	
Industrial	49	49,006	3.3	
Total	561	292,346	30.9	26.9
Market Area 8				
Education	0	-	-	
Office	37	10,196	1.1	
Retail	14	7,089	0.8	
Service	8	4,215	0.5	
Medical	3	988	0.1	
Industrial	58	58,343	3.9	
Total	121	80,831	6.4	286.9
Market Area 9				
Education	0	-	-	
Office	0	-	-	
Retail	0	-	-	
Service	0	-	-	
Medical	0	-	-	
Industrial	0	-	-	
Total	0	-	-	67.9
Market Area 10				
Education	0	-	-	
Office	0	-	-	
Retail	0	-	-	
Service	0	-	-	
Medical	0	-	-	
Industrial	0	-	-	
Total	0	-	-	171.8
Market Area 11				
Education	0	-	-	
Office	45	12,426	1.3	
Retail	42	20,855	2.3	
Service	80	39,973	4.3	
Medical	7	2,172	0.2	
Industrial	0	-	-	
Total	174	75,427	8.1	111.9
Market Area 13				
Education	19	12,062	2.7	
Office	19	5,103	0.6	
Retail	6	3,093	0.3	
Service	3	1,546	0.2	
Medical	0	-	-	
Industrial	0	-	-	
Total	46	21,805	3.8	110.2

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Appendix C: Non-Residential Development Capacity (continued)

Market Area 14				
Education	0	-	-	
Office	97	26,645	2.9	
Retail	89	44,719	4.8	
Service	171	85,711	9.3	
Medical	15	4,658	0.5	
Industrial	0	-	-	
Total	373	161,732	17.5	7.9

Notes:

Figures in columns may not sum to totals due to rounding.

For the geographic boundaries of the various Market Areas, please refer to Figure 1 on page 9.

(a) Calculations translate projected job growth into new demand for built space using the job density assumptions defined in Appendix C.

(b) Calculations translate building square feet into acres using the FAR assumptions defined in Appendix D, which range between 0.12 and 0.4 FAR depending on the land use. Calculations also assume that developments achieve only 85% of the allowed FAR.

(c) Total includes existing vacant acres zoned for Commercial Use, Retail Use, Office Use, and Industrial Use.

Source: BAE, 2013.

Appendix D: West Slope Job Density Assumptions for New Development

Land Use	Assumed Building Square Feet per Job	Assumed Floor Area Ratio
Education	650 (a)	0.12
Office	275	0.25
Retail	500	0.25
Service	500	0.25
Medical	312.5 (b)	0.25
Industrial	1,000	0.4

Notes:

(a) Educational FAR assumes employment density for elementary schools, from Employment Density Summary Report, Natelson Company, for Southern California Association of Governments, 2001.

(b) Per SACOG, medical is assumed as 25% "public" at 650 square feet per employee and 75% office, at 200 square feet per employee.

Sources: SCAG, 2001; County of El Dorado, 2013; SACOG, 2013; BAE, 2013.