

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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Suite 291
Los Angeles, CA 90036
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Washington DC
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Suite 403
Washington, DC 20009
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121 West 27th Street
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New York, NY 10001
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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 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:

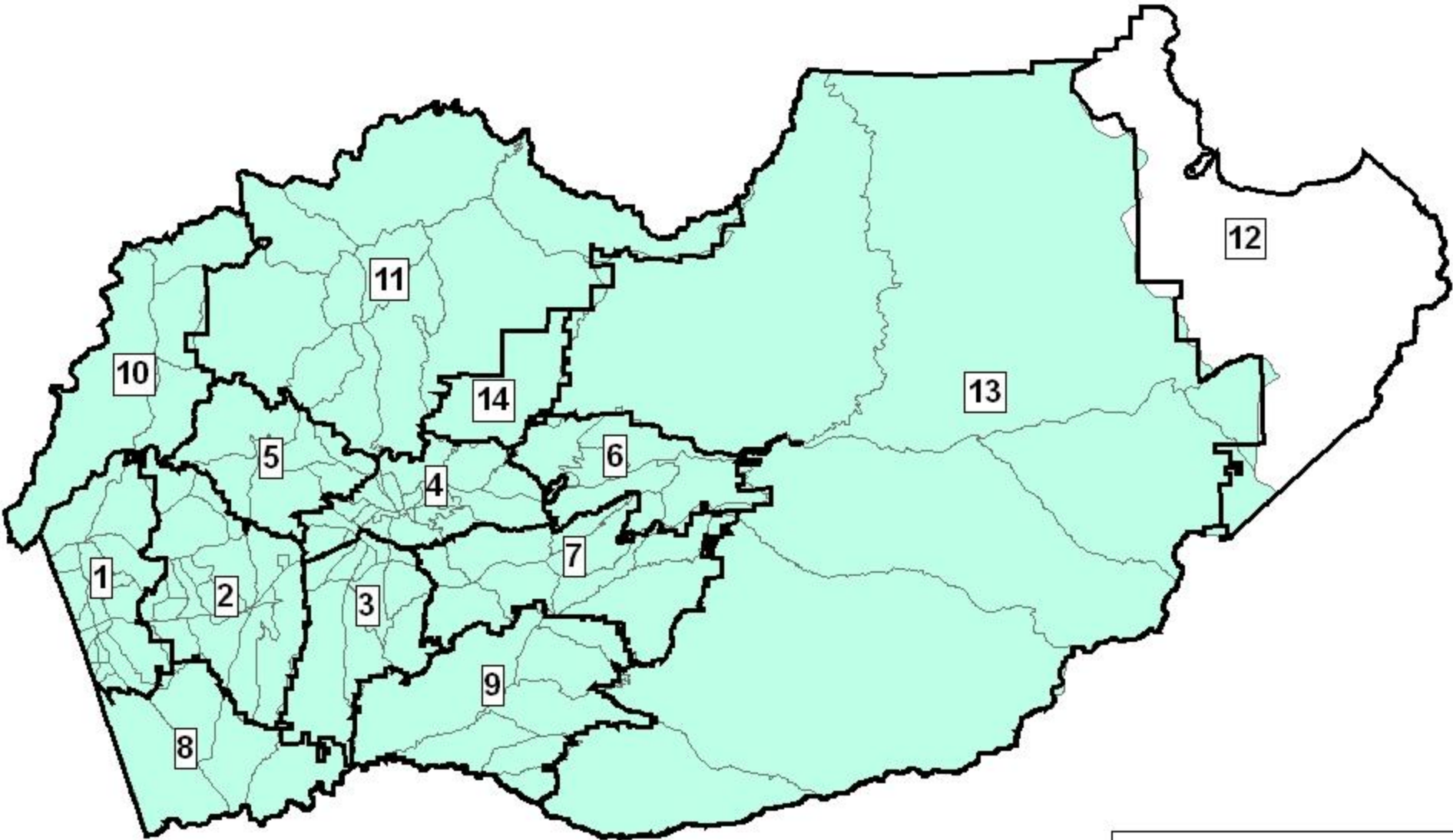
Figures in columns may not sum to totals due to rounding.

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



0 5 10 20 Miles

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:

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 | 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.