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DRAFT

NON-RESIDENTIAL AFFORDABLE HOUSING FEE REPORT

Prepared for
City of Goleta

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1.0 EXECUTIVE SUMMARY

This Non-Residential Affordable Housing Fees report (“Non-Residential Fee Report”) has been prepared for the City of Goleta (“City”) to support establishing a new affordable housing impact fee program for non-residential development. Establishing a non-residential affordable housing impact fee is an implementation action for the City’s Housing Element Policy HE 2.2b, Mitigation of Employee Housing Impacts, which requires new non-residential development to contribute to providing affordable employee housing. This report summarizes the nexus analysis identifying maximum fee levels, presents analyses that provide context for potential fee levels, and provides recommendations regarding a potential new affordable housing impact fee program.

Goleta is the only jurisdiction in Santa Barbara County identified as having a policy to mitigate the impacts of non-residential development on the demand for housing, although there are approximately 50 jurisdictions in California with such programs. The “Non-Residential Affordable Housing Nexus Analysis (“Nexus Analysis”), included as Appendix C, determines maximum impact fees, with results ranging from \$25 to \$112 per square foot of building area, depending on the use. Fees after making an optional “commute adjustment” range from approximately \$6 to \$26, depending on the use, and reflect mitigation of a share of housing impacts based on the 23% share of jobs in Goleta that are held by Goleta residents. Nexus maximums are technical results only, not recommendations, and jurisdictions nearly always set affordable housing impact fees below these levels based on additional policy considerations.

Goleta’s total existing impact fees are higher than fees in Santa Barbara, Ventura, and Santa Maria, and similar to adjacent unincorporated areas of Santa Barbara County. Despite having relatively high impact fees, the City captured nearly half of office development and nearly a third of hotel development in Santa Barbara County over the prior ten years. However, Goleta Water District’s temporary moratorium on new water service connections is likely to limit additional non-residential development in the near term.

Housing payments made by past non-residential projects to comply with Housing Element Policy HE 2.2b were determined on a project-by-project basis and have averaged approximately \$6 per gross square foot of building area, which equates to an estimated 1% to 2% of the total development cost for non-residential projects and demonstrates an ability of non-residential projects to sustain an impact fee at a similar level.

Based on the review of non-residential market conditions, development costs, housing fees in other jurisdictions, and overall fee burden in Goleta, KMA recommends adoption of an affordable housing impact fee of up to approximately \$8 per gross square foot for Office and Medical, \$5 per gross square foot for Warehouse and Industrial, \$2 per gross square foot for Retail and Commercial, and \$4,800 per room for Hotel. Recommended fees for Warehouse and Industrial are somewhat lower than Office due to the lower rent and lower cost nature of these buildings, which can make them more sensitive to increased costs. Recommended fees for

Retail are lower based on consideration of the comparatively high existing fees that already apply to Retail. Recommended fees would establish Goleta's program within the upper half of the range of affordable housing impact fee programs within Southern California and the Central Coast, somewhat below the cities of Santa Monica and West Hollywood and above the cities of San Diego, Glendale and Los Angeles. Additional discussion of recommendations is provided in Section 3.2.

2.0 INTRODUCTION

This Non-Residential Affordable Housing Fees report (“Non-Residential Fee Report”) has been prepared by Keyser Marston Associates, Inc. (“KMA”) for the City of Goleta (“City”) to support establishing a proposed new citywide affordable housing impact fee program for non-residential development within the City. The report summarizes the nexus analysis identifying maximum fee levels, presents analyses that provide additional context for potential fee levels, and provides recommendations regarding a potential new affordable housing impact fee program.

The City’s Housing Element, Policy HE 2.2b, Mitigation of Employee Housing Impacts, requires that new non-residential development and proposed expansion or intensification of existing non-residential development contribute to providing affordable employee housing. Projects subject to this policy have generally complied by making an in-lieu financial contribution to the City, which is used to provide financial assistance to affordable housing projects that expand the supply of affordable housing. These past in-lieu financial contributions have been established as part of the conditions of approval for projects and were determined on a project-by-project basis. Financial contributions under the policy have equated to an average of approximately \$6 per gross square foot of non-residential development¹.

This Non-Residential Fee Report presents a range of materials to help the City Council determine if the City should adopt new affordable housing impact fees for non-residential development to assist in providing affordable housing. Non-residential affordable housing impact fees are also referred to as “commercial linkage fees.” Establishing a non-residential affordable housing impact fee is an implementation action for the City’s Housing Element Policy HE 2.2b and, once adopted, would replace the current project-by-project approach, and help to mitigate the impacts of new development on the need for affordable housing. Context materials presented in this report include the following:

1. Nexus results establishing maximum fee levels proportionate to the cost of mitigating affordable housing impacts of non-residential development,
2. Nexus results after an optional adjustment for the existing share of jobs that are held by Goleta residents,
3. Application of Housing Element Policy HE 2.2b to past projects,
4. Market context and non-residential development activity in Goleta,
5. Summary of developer and property owner interviews,
6. Fees as a percent of total development costs,
7. Summary of non-residential affordable housing fee programs elsewhere in California,
8. Comparison of total fees and permit cost to other jurisdictions, and
9. Analysis to support an option to construct affordable units rather than pay a fee.

¹ \$6 per square foot average is based on six prior non-residential projects reviewed in Section 4.3 and is adjusted for inflation.

A companion report, entitled “Non-Residential Affordable Housing Nexus Analysis (“Nexus Analysis”) provides the nexus analysis to support the potential adoption of affordable housing impact fees and is included as Appendix C to this report.

3.0 SUMMARY OF FINDINGS AND RECOMMENDATIONS

3.1 Summary of Findings

The following is a summary of the analyses and context information assembled in this report.

1. ***Upper Limit on Fees*** – The Nexus Analysis establishes an upper limit on fees by building type ranging from \$25 per square foot for warehouse up to \$112 per square foot for retail / commercial uses. The City is free to select fees anywhere below this level by taking into account a range of other policy considerations. Findings after an optional adjustment for commuting are also provided and reflect mitigation of a 23% share of the total affordable housing impacts, which is consistent with the share of jobs in Goleta that are held by Goleta residents. These commute-adjusted findings range from approximately \$6 per square foot for warehouse up to \$26 per square foot for retail / commercial uses.
2. ***Prior Application of Employee Housing Mitigation Requirement*** – Past non-residential projects subject to the City's policy requiring mitigation of employee housing impacts have complied through an in-lieu payment determined on a project-by-project basis. These fees have equated to approximately \$2 to \$7 per gross square foot of building area, apart from one medical office project which was subject to a fee equivalent to \$11 per square foot. The overall average for six prior non-residential projects reviewed in Section 4.3 is \$6 per gross square foot of building area.
3. ***Development Activity in City of Goleta*** – In the last 10 years, the City has captured nearly half of the total new office development activity and nearly a third of the total new hotel development activity occurring in Santa Barbara County. In contrast, the City has captured less than 10% of recent industrial and retail development activity occurring in the County. Starting in September of 2014, the Goleta Water District introduced a temporary moratorium on new water service connections, except for projects with historical water credits based upon past water usage, which is likely to limit new development in the near-term. As the City becomes more built-out, availability of undeveloped lands that are suitable for non-residential development is also likely to limit the level of new development activity citywide.
4. ***Development Community Contacts*** – KMA conducted interviews with developers and property owners who have been active in the City to gain a better understanding of local market conditions and any unique considerations pertinent to the design of an affordable housing fee program. Interview participants noted that while there is market support for new non-residential development in the City, the complexity of the local entitlement process and the temporary moratorium on new water service connections represent significant barriers to bringing forward new projects. Impact fees were noted as a

secondary concern and that a modest increase in fees is unlikely to deter development of projects that are otherwise able to address the primary challenges of entitlements and difficulty in obtaining water service.

5. ***Total Impact Fee Comparison*** – To assist in understanding how impact fees in the City compare to other nearby jurisdictions, KMA assembled information regarding total impact fees in the cities of Santa Barbara, Ventura, and Santa Maria, as well as County of Santa Barbara unincorporated areas. The results indicate that the City’s impact fees are higher than nearby communities, except for the County’s Goleta planning area, which includes the Eastern Goleta Valley Community Plan area and the unincorporated area within the Goleta Community Plan. The “total fee burden” is one of many factors that non-residential developers and end users may consider in assessing locations for a potential new development. Other important factors include land costs, infrastructure capacity, transportation networks, zoning, and proximity to suppliers, labor, and customers.
6. ***Commercial Linkage Fees in Other Jurisdictions*** – Statewide, there are over 50 “commercial linkage fee” programs. The cities of Los Angeles and San Diego both have programs along with at least four other jurisdictions located in Southern California. Both the City and County of San Luis Obispo also have programs. Currently, Goleta appears to be the only jurisdiction in Santa Barbara County with a policy to mitigate the impacts of non-residential development on the demand for housing. Fee levels for programs in other jurisdictions outside of Santa Barbara County range from a low of approximately \$1 per square foot in the County of San Luis Obispo up to a high of approximately \$13 per square foot with office uses in the City of Santa Monica. Additionally, some jurisdictions have set the same fee rate for all land use categories while others have chosen to distinguish their fees by use.
7. ***Housing Fees as a Percent of Total Development Costs*** – Previous housing fees paid by prior non-residential development projects in the City represent an estimated 1% to 2% of the total development cost inclusive of direct construction, other governmental fees, design and other indirect costs, financing, and land. Housing fees appear unlikely to have a material influence on development decisions to the extent they continue to represent a modest share of the overall development costs.

3.2 Program Recommendations

The following are recommendations regarding fee levels and other key features of a new non-residential affordable housing impact fee program for the City to consider for implementing General Plan Housing Element Policy HE 2.2b.

1. **Fee Level** – Based on the review of non-residential market conditions, development costs, housing fees in other jurisdictions, and overall fee burden summarized above, the following recommended non-residential affordable housing impact fee levels should be considered:

- Adopt a new housing impact fee for most non-residential development of up to approximately \$8.00 per gross square foot or up to \$4,800 per room² for Hotel uses.
- Adopt new housing impact fees for Warehouse and Industrial uses of up to approximately \$5.00 per gross square foot. This lower recommended fee for Warehouse and Industrial recognizes the lower rent and lower cost nature of these types of buildings, which can make them more sensitive to additional costs. Warehouse buildings also have fewer employees than other uses, which results in lesser housing impacts.
- For Retail, adopt a fee in the range of \$2.00 per gross square foot. This lower fee recognizes the comparatively high existing fees that already apply to Retail uses. Although the City's retail appears to have been relatively resilient to the impacts of the Covid-19 pandemic and the increasing shift toward on-line shopping, retail uses are facing an increasingly uncertain future due to these broader trends.

The impact fee levels recommended above reflect the considerations discussed within the Non-Residential Fee Report. The City is free to bring other policy considerations to bear in selecting fees within the maximums supported by the Nexus Analysis.

Table 3-1 presents the recommended impact fee levels in combination with other context materials including total fees, fees as a share of development costs, impact fees in comparison jurisdictions, housing fees in other jurisdictions, and the results of the Nexus Analysis. The City's fees are either at or near the high end of the range of the comparison jurisdictions surveyed. These higher fees are primarily driven by the City's traffic impact fees and would remain comparatively higher with the addition of the proposed fees.

Recommended fees represent a modest increase over the fees that have been applied historically as part of the City's application of policy HE 2.2b for mitigating employee housing impacts.

² A rate of \$4,800 per hotel room is approximately the equivalent to \$8.00 per square foot based on 600 gross square foot of building area per hotel room.

Table 3-1 – Maximum Recommended Fees and Selected Context Information

	Warehouse/ Distribution (\$/GSF)	Business Park ⁽²⁾ (\$/GSF)	Medical Office (\$/GSF)	Retail / Shopping Center (\$/GSF)	Hotel (\$/GSF)
1. Impact Fees (Existing + Proposed)					
Housing Fee Recommended, up to:	\$5	\$7 ⁽³⁾	\$8	\$2	\$8
Other Existing Impact Fees ⁽¹⁾	\$6	\$22	\$49	\$69	\$19
Total Existing + Housing Fee	\$11	\$29	\$57	\$71	\$27
2. Goleta Fees as Percent of Total Development Cost					
Existing Impact Fees	3%	6%	9%	13%	5%
Existing + Housing Fee	5%	8%	11%	14%	7%
3. Comparison Jurisdiction Total Impact Fees ⁽¹⁾					
Low (City of Santa Barbara)	\$1	\$1	\$1	\$1	\$1
High (County: Goleta Area)	\$14	\$26	\$64	\$69	\$15
4. Prior Goleta Housing Fees					
	N/A	\$5	\$13	N/A	\$6
5. Other Linkage Fee Programs: Southern Calif & Central Coast					
Low (SLO Co. for most uses)	\$1	\$1	\$1	\$1	\$0
High (Santa Monica most uses)	\$5	\$13	\$9	\$11	\$9
6. Nexus Findings ⁽⁴⁾					
Total Nexus Cost	\$25	R&D: \$45; Industrial: \$80; Office: \$97	\$97	\$112	\$45
Nexus Cost After Optional Commute Adjustment	\$6	R&D: \$10; Industrial: \$18; Office: \$22	\$22	\$26	\$10

(1) See Appendix A Tables A-6 to A-11 for details.

(2) Business Park includes a mix of Office, Industrial, and R&D land uses. These uses are analyzed as part of a Business Park prototype for purposes of the development cost context and fee comparison addressed in this report but are separately analyzed for purposes of the Nexus Analysis.

(3) Business Park reflects a mix of Office / R&D / Industrial; Accordingly, the fee reflects a blended rate calculated as 40% X \$5 per sq.ft. Warehouse / Industrial fee + 60% X \$8 per sq.ft. Office fee = \$6.80 per sq. ft. rounded to \$7 per sq.ft.

(4) Rounded down to the nearest whole dollar. See Tables 4-2 and 4-3 for exact figures.

- Indexing** – Consider implementing an indexing feature to allow fees to be adjusted automatically to keep pace with increases in costs over time, based on a published inflation index. Other impact fee programs in the City use the Construction Cost Index published by the Engineering News Record. This same index should be considered for affordable housing impact fees.
- Exemptions** – The City could also consider extending its existing development impact fee policy for “beneficial projects” to the new affordable housing impact fees as well. This “beneficial projects” policy exempts the initial 15,000 square feet of gross building area for

all non-profit organizations, exempts non-profit residential care and assisted living facilities from all impact fees, and reduces fees by 85 percent for any new for-profit facility of the same type. Additionally, exemptions for schools, assembly, and governmental uses are recommended because these structures were not analyzed in the Nexus Analysis.

4. **Project Size Threshold** – Some programs include a minimum project size threshold above which fees apply while others apply fees to projects of all sizes. Thresholds are a way to try to encourage smaller scale and infill projects while applying the full fee to larger-scale projects seen as having greater impacts and more robust feasibility. The other Southern California and Central Coast jurisdictions surveyed use thresholds that range from 1,250 to 15,000 square feet. The City's existing development impact fee schedule for non-residential projects applies fees to projects of all sizes. If the City would like to reduce fees for smaller-scale projects, the City could include a minimum project size for application of fees.
5. **Phase-In** – When adopting new or increased fees, communities sometimes include a phase-in schedule prior to implementation of the full fee levels. This is a way to allow time for the market to adjust to the new requirement and for projects to plan for the new fee. The City may wish to consider a phase-in feature if fees will be increased significantly over fee levels that have been applied previously in implementing the City's General Plan Housing Element Policy HE 2.2b.
6. **On-site Option** – Many housing impact fee programs include an option to deliver affordable units directly as an alternative to paying a fee. Some communities specify a formula to calculate fee credits for developers that provide affordable units while other programs include more general ordinance language to address this situation. Section 3-9 of this report and Appendix A Table A-21 provide information that could be used to establish fee credits for developers that provide affordable units, in the event the City would like to develop such a formula.

4.0 CONTEXT MATERIALS

The purpose of this section is to provide a series of context materials and analyses to assist the City in adopting an affordable housing fee program for non-residential development. Fee levels may be set at any level below the maximums supported by the Nexus Analysis and policy makers are free to consider a variety of policy goals in the selection of fee levels. This section includes a range of materials that decision making bodies sometimes find useful as context for decision-making.

4.1 Maximum Fee Levels

The separate Nexus Analysis, which is included as Appendix C, establishes a maximum or ceiling on potential fee levels based on the cost of mitigating the affordable housing impacts of new non-residential development. These Nexus Analysis maximum fee levels represent the upper-most fee that would be consistent with the Mitigation Fee Act (Government Code Section 66000 et seq.) requirement that a reasonable relationship be established between fees and the impacts the fee mitigates. Table 4-1 lists the Nexus Analysis maximum fee level results for each of the eight land use types studied. The results are derived from the technical analysis only and are not recommended fee levels. The City is encouraged to take other policy considerations into account as it determines fee levels, which could be set anywhere below the maximums identified in the Nexus Analysis.

Table 4-1 – Nexus Analysis Maximum Fee Levels Per Square Foot of Gross Building Area	
Office	\$97.80
Medical	\$85.20
Retail / Commercial	\$112.90
Hotel	\$45.40
Industrial	\$80.10
Research and Development	\$45.00
Warehouse	\$25.90
Residential Care	\$25.70

Source: Nexus Analysis (Appendix C).

4.2 Nexus Results After Optional Adjustment for Local Commuting

This section of the report presents the results of the Nexus Analysis after making an optional adjustment for local commuting. The adjustment for commuting is based on the 23% share of people who work in Goleta that also live in Goleta, based on data from the U.S. Census. If the existing commute relationship were to hold for new employee households, 23% would be expected to reside within Goleta, with the remaining 77% living in other communities throughout the County and region. The figures shown below in Table 4-2 are provided to illustrate the cost of mitigating a 23% share of the affordable housing impacts consistent with the existing share of

jobs in Goleta that are held by Goleta residents. As this adjustment is not required for nexus purposes, it is not reflected in the Nexus Analysis itself.

Table 4-2 – Nexus Analysis Fee Levels After 23% Commute Adjustment Per Square Foot of Gross Building Area	
Office	\$22.50
Medical	\$19.60
Retail / Commercial	\$26.00
Hotel	\$10.40
Industrial	\$18.40
Research and Development	\$10.40
Warehouse	\$6.00
Residential Care	\$5.90

Source: Nexus Analysis, and 2015-2019 American Community Survey Tables B08008, S0804, and B08006.

It is possible that more than a 23% share of those who work in Goleta would choose to live in Goleta if additional housing options or more affordable housing options were available. However, it is unlikely that 100% of people who work in the City would choose to live in the City because choices regarding where to live depend on a number of additional factors (schools, style of housing, types of amenities, viewsheds, noise, local services, etc.), in addition to where someone works, and many households also have more than worker, and so must consider the locations of multiple jobs in selecting a place to live.

4.3 Existing Affordable Housing Requirements

Goleta Housing Element Policy HE 2.2b requires new non-residential development to contribute to providing affordable employee housing, either through fee payment, provision of on-site units, housing assistance as part of employee benefit packages, or other alternatives of similar value. To date, Housing Element Policy HE 2.2b has been applied on a project-by-project basis through conditions of approval for new development projects that are subject to this policy and its requirements. Projects have generally complied through a monetary payment to the City that is dedicated to help finance future affordable housing projects. The City's General Plan Housing Element Policy HE 2.2b, Mitigation of Employee Housing Impacts, is excerpted below:

The City will require new non-residential development and proposed expansion or intensification of existing non-residential development to contribute to providing affordable employee housing. The proposed amount of floor area and type of non-residential use must be factors in establishing the requirement for individual projects. Alternatives to satisfy this requirement may, at the discretion of the City, include payment of a development impact fee, providing housing on site, housing assistance as part of employee benefit packages, or other alternatives of similar value. The City will prepare an Affordable Employee Housing Plan that includes details of the program, including the results of a development impact fee study and/or alternative programs.

To illustrate the City's current administrative practices, affordable housing payments for six non-residential projects approved since 2008 are summarized. Fees paid by those six projects are summarized in Table 4-3 below. As shown, fees for the "Hotel" and "Business Park" land uses, which includes Office, Industrial, and R&D, averaged approximately \$4 to \$5 per square foot (\$5 to \$6 per square foot after adjusting for inflation). One medical office project paid a higher fee of approximately \$11 per square foot (or \$13 per square foot when adjusted for inflation). The average fee for all six projects is approximately \$6 per square foot, weighted based on building area and adjusted for inflation.

Table 4-3 – In-Lieu Affordable Housing Payment Applied to Prior Non-Residential Projects

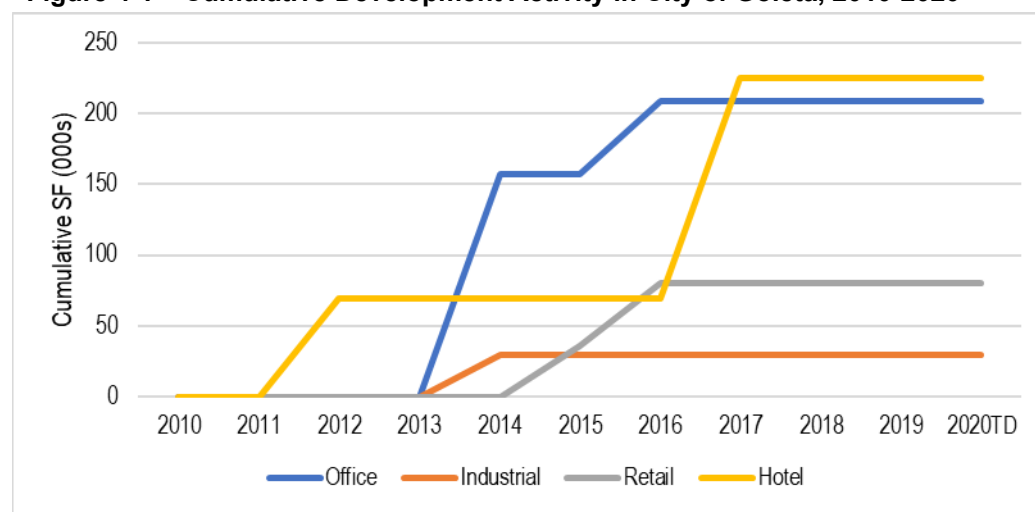
	Business Park*	Hotel	Medical Office
Sample Projects	3	2	1
Total Square Feet	55,000	148,000	10,000
Approval Year(s)	2009-2012	2008-09	2011
Fee Range PSF (Nominal \$)	\$2-\$7	\$4-\$5	\$10.70
Avg. Fee PSF (Nominal \$)	\$4.10	\$4.50	\$10.70
Avg. Fee PSF (\$current)	\$5.00	\$5.60	\$12.80

Source: City of Goleta. Note: "Nominal \$" means prior to inflation adjustment and "\$current" indicates after adjusting for inflation.

4.4 Market Context

Office and Hotel uses have comprised most of the development activity in Goleta over the past 10 years. Figure 4-1 provides a summary of cumulative development activity in the City from 2010 through 2020. As shown, Office development totaled 210,000 square feet and Hotel development totaled 225,000 square feet (375 rooms). Industrial and Retail development activity has been more modest at 30,000 and 80,000 square feet of cumulative development, respectively.

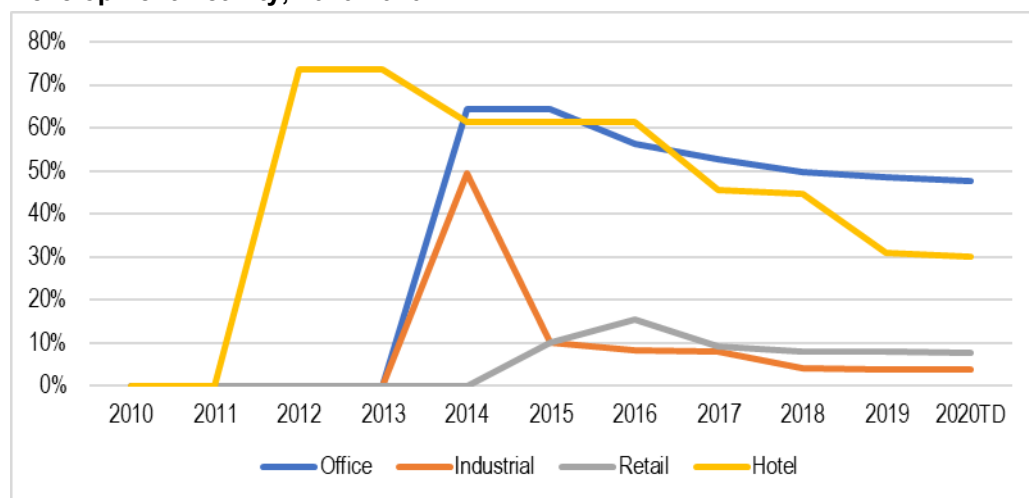
Figure 4-1 – Cumulative Development Activity in City of Goleta, 2010-2020



Source: Costar (10/2020). Hotel square feet estimated at 600 square feet per room.

Goleta has captured nearly half of the Office development activity within Santa Barbara County in the last 10 years and nearly a third of the Hotel development in the County. In contrast, Goleta has captured less than 10% of recent Industrial and Retail development activity. Figure 4-2 expresses cumulative development activity in Goleta as a percentage of total development activity throughout the County.

Figure 4-2 – Cumulative Development Activity in Goleta as Percentage of Countywide Development Activity, 2010-2020



Source: Costar

In 2014, the Goleta Water District ceased to approve new and additional water connections throughout its service area in order to comply with the voter-approved SAFE Water Supplies Ordinance of 1991, which prohibits such connections unless certain conditions are met. Since the temporary moratorium went into effect, only development projects that had previously paid connection fees or relied upon historical water credits have been able to move forward in the permit process. In October 2020, the Goleta Water District extended the moratorium for calendar year 2021 because it was unable to meet its annual storage commitment to the drought buffer required by the SAFE Ordinance. As a result, new non-residential development in Goleta is likely to continue to be limited in the near term.

The commercial real estate market in Goleta has been relatively resilient through the coronavirus pandemic. The number of lease transactions declined during the pandemic and remained muted during the first quarter of 2021, but signs of increasing activity were evident and office rents have generally held at pre-pandemic levels as indicated in the Q1 2021 Market Report by Hayes Commercial. Rents have increased across office, retail, and industrial sectors compared to 2020 and vacancy rates remain relatively low, according to the same Hayes Commercial Market Report. The retail tenant base in Goleta is weighted toward grocery and home improvement sectors, which have outperformed other types of retail during the pandemic.

Table 4-4 – Goleta Real Estate Market Conditions in 2021, Q1 (and change from prior year)

	Office		Retail		Industrial	
Vacancy	6.0%	▼ 8%	2.7%	▲ 6%	5.4%	▼ 7%
Lease Transactions	6	▼ 23%	4	▲ 100%	3	▼ 60%
Gross Absorption (SF 000s)	68	▲ 0%	7	▼ 41%	9	▼ 83%
Rent	\$2.11	▲ 8%	\$3.39	▲ 55%	\$1.72	▲ 10%

Source: Hayes Commercial Q1 2021 Market Report. Percentage change based on comparison to prior year.

The local hotel market was significantly impacted by the pandemic but is showing signs of recovery³. Statewide, domestic travel is forecast to approach approximately 80% of pre-pandemic levels in 2021; however, recovery in international travel has lagged and is not forecast to reach pre-pandemic levels until 2024⁴.

4.5 Development Community Contacts

KMA conducted interviews with several local developers with recent or currently active development projects and/or significant investments in non-residential property in the City. The purpose of the discussions was to gain a better understanding of local market conditions and any unique considerations that could be pertinent to establishing affordable housing fees and compliance alternatives. Interview participants represented the following organizations:

- Price Management with Flowers & Associates
- Cottage Hospital
- Towbes Group
- City Ventures

The following key themes emerged in these discussions:

- *Market Demand for Additional Non-Residential Development* – Developers believe there is market support for additional non-residential development in the City, due to locational advantages, including a skilled workforce and proximity to UC Santa Barbara.
- *Entitlement Process, Water Service Viewed as Primary Barriers to Development* – Nearly all of the developers cited the complexity of the local entitlement process and the current moratorium on new water service as the primary barriers to new non-residential development in the City. These factors were also cited as having discouraged them from pursuing additional projects in Goleta. While the City's impact fees are higher than in nearby communities, challenges around water service and the approval process for projects were emphasized as the primary barriers to development rather than fees.
- *Interest in Program Outcomes* – In general, developers support the goal of meeting the housing needs of the local workforce and expressed interest in how the City will use

³ Visit Santa Barbara hosts General Meeting & Tourism Celebration. June 30, 2021. <https://keyt.com/news/santa-barbara-s-county/2021/06/30/general-meeting-of-tourism-makes-comeback-santa-barbara/>

⁴ California Travel-Related Spend & Visitation Forecast (June update). July 15, 2021.

affordable housing fees to achieve this goal. Developers encouraged the City to define a plan for how affordable housing fees will be spent and to provide regular updates on the affordable housing units that receive local funding derived from the program.

- *Shared Responsibility* – One developer expressed support for commercial linkage fees as an approach to sharing the burden of addressing the need for affordable housing relative to inclusionary requirements that apply to residential projects. The need for other public funding sources was also emphasized during the discussions.

The above summary reflects comments pertinent to non-residential housing requirements. The companion report entitled Residential Affordable Housing In-Lieu Fee Analysis and Recommendations summarizes the same interviews with an emphasis on those themes that are pertinent to residential development projects. Additionally, KMA reached out to approximately five other developers who either declined, or did not respond to, requests for an interview.

4.6 Development Cost Analysis

Understanding existing and proposed non-residential fee levels in the context of total development costs is one consideration that many jurisdictions include in their fee setting discussions.

KMA prepared total development cost estimates for five prototype non-residential development projects identified in consultation with City staff. The cost estimates include local land costs, local fees, and all indirect and financing costs. This cost analysis allows potential fee levels to be framed in terms of a percentage of total development costs.

Development Prototypes

For the development cost analysis, KMA evaluated development costs for five prototype projects including:

- Warehouse,
- Business Park (assumed to be 60% Office/R&D and 40% Warehouse/Light-Industrial based upon recent development activity),
- Medical Office,
- Neighborhood Shopping Center, and
- Hotel.

The development prototypes used in the analysis were based upon a review of recently approved projects and others that are currently in the permit process. These prototypes are intended to be representative of the types of non-residential development expected to occur within the City in the coming years.

Table 4-5 provides a summary of programmatic assumptions for each development prototype. While it is acknowledged that there will be differences in density from one project to another, it is

not necessary to analyze every variation of project density or prototype for purposes of the development cost assessment. Instead, the intent of the analysis is to provide a general range of development costs for new projects and show the impact that fees can have relative to those costs.

Table 4-5 – Non-Residential Development Prototypes

	Warehouse/ Distribution	Business Park*	Medical Office	Shopping Center	Hotel
Land Acres	6.1	3.3	2.3	7.3	3.1
FAR	0.30	0.35	0.50	0.25	0.55
Gross Sq. Ft.	80,000	50,000	50,000	80,000	75,000
Hotel Rooms	n/a	n/a	n/a	n/a	125
Building Floors	1	2	2	1	3

* Assumed to be 60% office/R&D and 40% warehouse/light industrial.

"FAR" (Floor Area Ratio) percentage shown in decimal form.

Prototypes assume surface parking rather than structured consistent with recently approved projects.

Development Costs

The estimates of total development costs for the non-residential prototypes are shown in Table 4-6 below, before the cost of complying with affordable housing requirements are factored in. The costs include estimates for land acquisition, direct construction costs, other development impact fees (not including housing fees), other indirect costs, and financing. Additional detail is provided in Appendix A, Table A-2. The estimates are based on KMA's database of costs from similar commercial projects and third-party data sources, as well as fee schedules from Goleta and other local agencies.

As shown, total development costs range from a low of approximately \$215-\$260 per square foot for the Warehouse prototype to a high of approximately \$480-\$585 per square foot for the Medical Office prototype.

Existing impact fees represent between 3% and 13% of total development costs. The City's transportation impact fee explains most of the variation in impact fees for each prototype. Lastly, the impact fee estimates exclude any public water and sewer connection fees because most projects built in the near term are likely to solely rely upon historical water credits due to the Goleta Water District's temporary moratorium on new or additional water service connections.

Table 4-6 – Non-residential Development Cost Summary (\$/GSF)

	Warehouse/ Distribution	Business Park	Medical Office	Shopping Center	Hotel
Land Acquisition ⁽¹⁾	\$100/sf	\$129/sf	\$90/sf	\$180/sf	\$91/sf
Direct Costs ⁽²⁾	\$100/sf	\$145/sf	\$290/sf	\$185/sf	\$195/sf
Impact Fees	\$6/sf	\$22/sf	\$49/sf	\$69/sf	\$19/sf
Other Indirect Costs	<u>\$32/sf</u>	<u>\$43/sf</u>	<u>\$104/sf</u>	<u>\$93/sf</u>	<u>\$75/sf</u>
Total Costs	\$238/sf	\$339/sf	\$533/sf	\$527/sf	\$379/sf
Total Costs Range (+/-10%)	\$215-\$260/sf	\$305-\$375/sf	\$480-\$585/sf	\$475-\$580/sf	\$340-\$415/sf

⁽¹⁾ Land acquisition costs estimated based on recent land sale comps. (See Appendix A, Table A-18.)

⁽²⁾ Direct construction cost estimates from RS Means, Saylor Current Construction Costs, and other project pro formas.

Fees as a Percentage of Development Costs

One approach to understanding the likelihood that a new fee will influence development decisions is to consider how those fees would relate to the total development cost of a project. Fees representing a smaller share of overall development costs will be less likely to affect development decisions and vice versa.

Table 4-7 presents a range of potential non-residential impact fee levels, expressed as a percentage of total development costs. Warehouse and Industrial buildings represent the low end of the development cost range, and as a result, each dollar of fees represents a larger burden relative to the total investment being made. As one illustration, a fee of \$2 per square foot would represent approximately the same percentage of costs for a Warehouse building as a \$4 per square foot impact fee would represent for a Retail or Medical Office building.

Past non-residential projects in Goleta subject to the City's affordable housing requirements have made payments (summarized above in Section 4.3) representing an estimated 1% to 2% of the total cost to develop new non-residential buildings. Those costs include direct construction, other governmental fees, design and other indirect costs, financing, and land. The successful completion of prior projects subject to affordable housing fees representing an estimated 1% to 2% of total cost is an indicator that projects could sustain an affordable housing impact fee at a similar level.

Table 4-7 – Linkage Fees as a Percentage of Total Development Costs

	Warehouse/ Distribution	Business Park	Medical Office	Shopping Center	Hotel
Total Cost Range	\$215-\$260/sf	\$305-\$375/sf	\$480-\$585/sf	\$475-\$580/sf	\$340-\$415/sf
<u>Prior Project-Specific Fees as % of Costs</u>					
Past Practice (Current\$)	Not available	\$5.00/sf	\$12.80/sf	Not available	\$5.60/sf
% of Costs	Not available	1.5%	2.4%	Not available	1.5%
<u>Illustrative Fee % of Costs*</u>					
\$2/sf	0.8%	0.6%	0.4%	0.4%	0.5%
\$4/sf	1.7%	1.2%	0.8%	0.8%	1.1%
\$6/sf	2.5%	1.8%	1.1%	1.1%	1.6%
\$8/sf	3.4%	2.4%	1.5%	1.5%	2.1%
\$10/sf	4.2%	3.0%	1.9%	1.9%	2.6%
\$12/sf	5.1%	3.5%	2.3%	2.3%	3.2%
\$15/sf	6.3%	4.4%	2.8%	2.8%	4.0%
key: up to 1% 1-2% 2-3% over 3%					

*Fee percentage burden calculated at mid-point of cost range.

4.7 Other Non-Residential Affordable Housing Fee Programs

Statewide, there are over 50 jurisdictions with non-residential affordable housing impact fee programs. Goleta's employee housing mitigation requirement appears to be the only comparable program within Santa Barbara County. Table 4-8, below, summarizes affordable housing fee levels for other programs throughout Southern California and the Central Coast. Fee levels range from a low of under \$1 per square foot for Industrial in San Luis Obispo County to approximately \$13 per square foot for Office in Santa Monica.

Table 4-8 – Non Residential Affordable Housing Fees, Selected Jurisdictions (\$ / sq.ft.)

	Office	Retail	Hotel	Industrial
Los Angeles	\$3.11 - \$5.19 depending on Zone for all Non-Res.			
Santa Monica	\$12.81	\$11.14	\$3.51	\$8.61
West Hollywood	\$8.92	\$8.92	\$8.92	\$8.92
Culver City (proposed) ⁽¹⁾	\$5.00	\$5.00	\$5.00	\$5.00
Glendale	\$4.00	\$4.00	\$0.00	\$4.00
San Diego	\$2.12	\$1.28	\$1.28	\$0.00
County of San Luis Obispo	\$0.96	\$1.36	\$1.44	\$0.58
City of San Luis Obispo ⁽²⁾	\$6.25	\$5.50	\$7.25	\$5.25

⁽¹⁾ Proposed fee program that was not yet adopted as of the date of review.

⁽²⁾ Fee is 5% of building permit value. Per square foot figures calculated based on building permit valuation assumptions reflected in Appendix A Table A-4.

In addition to the programs listed above, the City of Thousand Oaks has an adopted affordable housing impact fee ordinance but does not appear to currently apply a fee, since its fees were set to zero in 2009 during the last recession and have not been reinstituted.

Additionally, a common feature of “commercial linkage fee” programs is a minimum project size threshold that is subject to affordable housing fees, with projects below the minimum size being exempt from the requirement. Other programs include a minimum project size threshold below which fee reductions apply. Table 4-9, below, summarizes minimum project size thresholds for the same list of programs previously discussed. The thresholds range from 1,250 square feet (Glendale) up to 15,000 square feet (Los Angeles). San Diego does not have a minimum size threshold and therefore applies their fee to projects of all sizes.

Table 4-9 – Minimum Project Size Subject to Non-Residential Affordable Housing Fees

	Minimum Project Size Subject to Fee (GSF)
Los Angeles	15,000 SF
Santa Monica	1,000 SF
West Hollywood	10,000 SF
Culver City (proposed) ⁽¹⁾	10,000 SF
Glendale	1,250 SF
San Diego	No minimum size - all projects subject
County of San Luis Obispo	5,000
City of San Luis Obispo	2,500

⁽¹⁾ Proposed fee program that was not yet adopted as of the date of review.

Appendix B provides additional information on “commercial linkage fee” programs throughout the State, including additional information on fee levels, thresholds, and exemptions.

4.8 Comparison of Impact Fees to Other Jurisdictions

As context for establishing affordable housing fees, KMA compiled a comparison of the total impact fees in Goleta and the following five potential competitive locations for the same types of development occurring in Goleta:

- City of Santa Barbara,
- Santa Barbara County, Goleta Planning Area,
- Santa Barbara County, Orcutt Planning Area,
- City of Ventura, and
- City of Santa Maria.

KMA prepared fee estimates for each of the development prototypes previously identified in Table 4-5 based on published fee schedules. The fee estimates focus on development impact fees, such as traffic police, fire, parks, and school fees, which are designed to offset the costs of public facilities required to service the new development. Fees related to processing of entitlements and building inspection are excluded from the estimate.

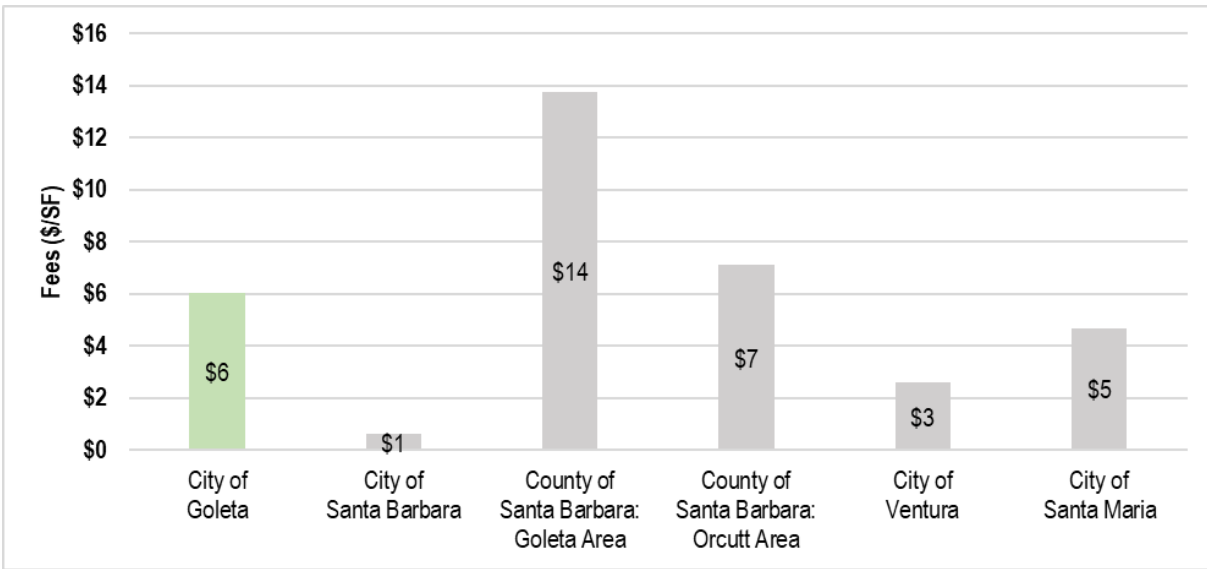
Figure 4-3 through Figure 4-7, below, depict total fees per square foot applicable to development in Goleta versus nearby jurisdictions. The figures show that total impact fees tend

to be lower for the Warehouse, Business Park, and Hotel development prototypes (ranging from \$6 to \$22 per square foot) and higher for the Medical, Office and Retail prototypes (ranging from \$64 to \$69 per square foot). As mentioned earlier, the City's traffic impact fee explains most of the variation in fees by development prototype. Fee estimates are shown without water and sewer connection fees due to the Goleta Water District's moratorium. For additional context, Appendix A, Table A-6 provides a fee comparison that includes public water and sewer connection fees. Lastly, the cost of compliance with Goleta's Housing Element Policy HE 2.2b is not included in the summary since the application of the policy has been on a project-by-project basis.

In terms of the competitive landscape, impact fees in Goleta are generally higher than comparison jurisdictions, except for the unincorporated "Goleta" community planning areas of Santa Barbara County. While these areas border the City, they are almost entirely residential or agricultural land and historically capture a small share of regional development activity. When the City incorporated in 2002, the County's impact fee schedule for the Goleta Planning Area was adopted by the City Council. Since that time, fee updates and administrative procedures in each jurisdiction have led to some differences in City and County impact fees. Compared to the County's "Goleta" community planning areas, the City's fees are less for the Industrial, Business Park, and Medical Office prototypes, similar for the Retail prototype, and higher for the Hotel prototype.

The total impact fee burden is one of many factors that non-residential developers may consider in assessing potential future development sites. Other important factors include, but are not limited to, land costs, infrastructure capacity, zoning, and proximity to labor and customers. As described earlier in Section 4-4, over the last decade, the City has captured a significant share of Office and Hotel development activity, despite having higher impact fees than most of the other comparison jurisdictions.

Figure 4-3 – Warehouse Prototype: Total Impact Fees PSF (Excluding Water / Sewer)



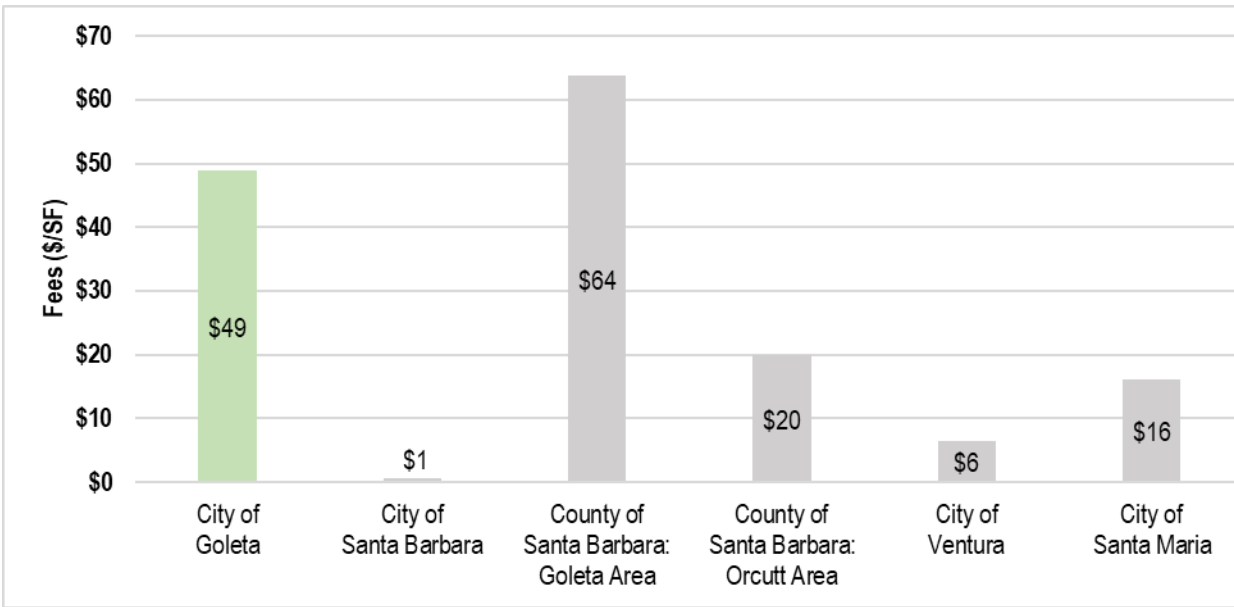
Source: KMA survey. See Appendix A Table A-7 for detailed breakout of development fees.

Figure 4-4 – Business Park Prototype: Total Impact Fees PSF (Excluding Water / Sewer)



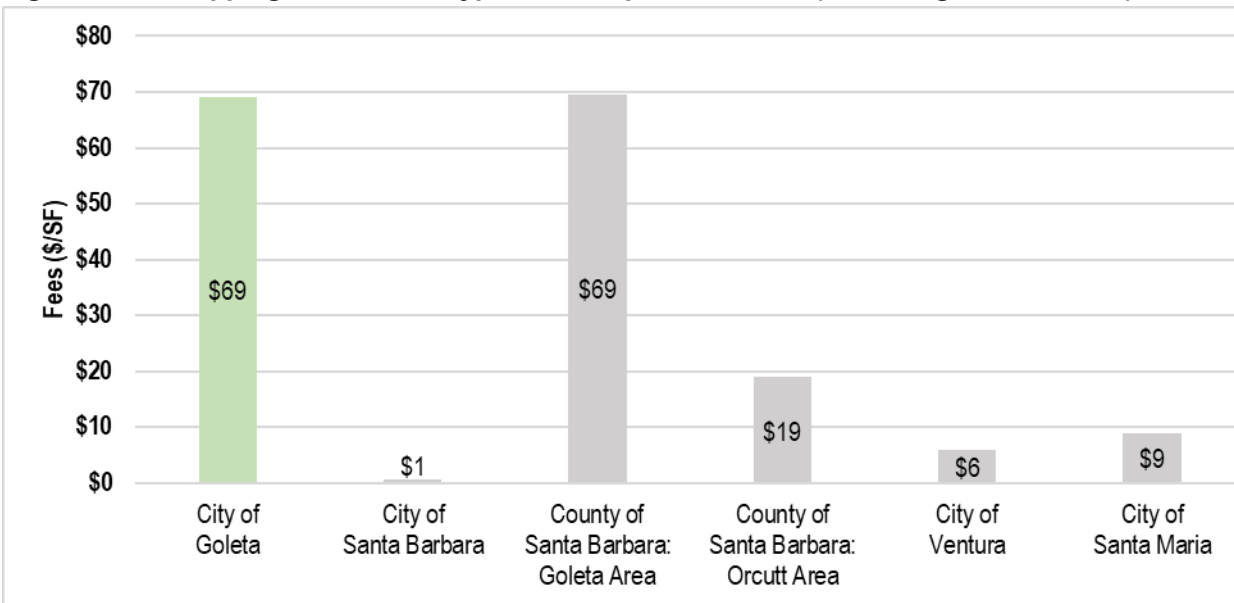
Source: KMA survey. See Appendix A Table A-8 for detailed breakout of development fees.

Figure 4-5 – Medical Office Prototype: Total Impact Fees PSF (Excluding Water/ Sewer)



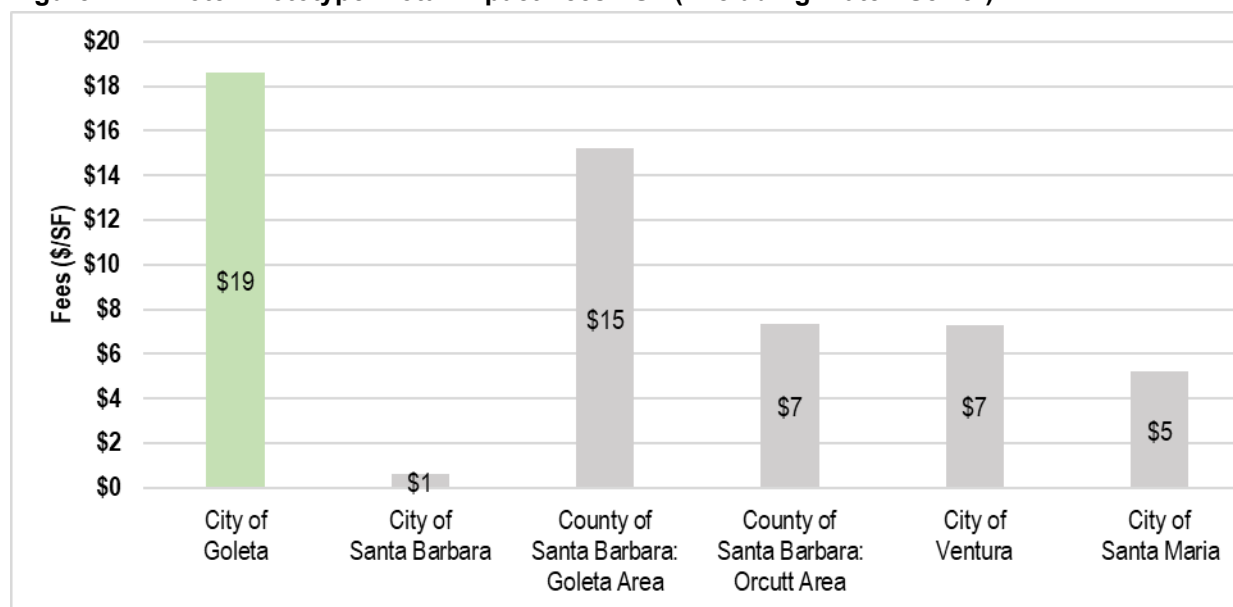
Source: KMA survey. See Appendix A Table A-9 for detailed breakout of development fees.

Figure 4-6 – Shopping Center Prototype: Total Impact Fees PSF (Excluding Water/ Sewer)



Source: KMA survey. See Appendix A Table A-10 for detailed breakout of development fees.

Figure 4-7 – Hotel Prototype: Total Impact Fees PSF (Excluding Water/ Sewer)



Source: KMA survey. See Appendix A Table A-11 for detailed breakout of development fees.

4.9 Credits for Providing Affordable Units

For projects that provide affordable units as part of their project, including on-site, off-site, or other alternatives⁵ it may be necessary to provide credit toward payment of the fee to the extent the affordable housing impacts documented in the Nexus Analysis are being fully mitigated. Some communities specify a formula to govern credits for provided affordable units while others include more general ordinance language to address this situation. Specifying a formula and establishing credits at a level that is in balance with fees is an approach to encouraging projects to provide affordable units directly, which adds flexibility to the program and may accelerate delivery of affordable units in some instances. Mixed-use projects with a significant residential component would be the most likely candidates to take advantage of such a provision. Appendix A, Table A-21 includes a matrix of example credits that could be used to establish credits for delivery of affordable units in the event the City would like to specify a formula. The sample uses the maximum fees levels from the Nexus Analysis. To provide an incentive for delivering affordable units, the schedule of credits would need to be rescaled to reflect the City-adopted fee levels using the procedure noted in the table.

⁵ Refer to Goleta Municipal Code subsection 17.28.050(D) for a discussion of inclusionary housing compliance hierarchy.

Appendix A – Supporting Technical Tables

Non-Residential Development Costs and Fee Comparison

Appendix A Table A-1
Non-Residential Development Prototypes
Non-Residential Fee Context
Goleta, CA

Non-Residential Prototype	Warehouse / Distribution	Business Park: Office/ R&D/ Lt. Ind. ⁽¹⁾	Medical Office	Neighborhood Shopping Center	Hotel
Gross Building Area	80,000 sf	50,000 sf	50,000 sf	80,000 sf	75,000 sf
FAR	0.30 FAR	0.35 FAR	0.50 FAR	0.25 FAR	0.55 FAR
Land Area	6.1 acres	3.3 acres	2.3 acres	7.3 acres	3.1 acres
Building Floors	1 floor	2 floors	2 floors	1 floor	3 floors
Construction Type	III-B	III-B	II-B	V-B	III-A
Hotel Rooms	n/a	n/a	n/a	n/a	125 rooms
Parking	Surface	Surface	Surface	Surface	600sf/rm Surface

⁽¹⁾ Assumed to be 60% office/R&D and 40% warehouse/ light industrial.

Appendix A Table A-2
Estimated Development Costs of Non-Residential Development Prototypes
Non-Residential Fee Context
Goleta, CA

Non-Residential Prototype	Warehouse / Distribution	Business Park: Office/ R&D/ Lt. Ind.	Medical Office	Neighborhood Shopping Center	Hotel
Gross Building Area	80,000 sf	50,000 sf	50,000 sf	80,000 sf	75,000 sf 125 rooms
FAR	0.30 FAR	0.35 FAR	0.50 FAR	0.25 FAR	0.55 FAR
Land Area	6.1 acres	3.3 acres	2.3 acres	7.3 acres	3.1 acres
	<u>\$/SF</u> <u>Total</u>	<u>\$/SF</u> <u>Total</u>	<u>\$/SF</u> <u>Total</u>	<u>\$/SF</u> <u>Total</u>	<u>\$/SF</u> <u>\$000/rm</u> <u>Total</u>
<u>Land Acquisition</u> ⁽¹⁾	\$100 \$8,000,000 \$30 /land sf	\$129 \$6,430,000 \$45 /land sf	\$90 \$4,500,000 \$45 /land sf	\$180 \$14,400,000 \$45 /land sf	\$91 \$55 \$6,820,000 \$50 /land sf
<u>Directs</u> ⁽²⁾	\$100 \$7,980,000	\$145 \$7,250,000	\$290 \$14,500,000	\$185 \$14,800,000	\$195 \$117 \$14,630,000
<u>Indirects</u>					
A&E	\$4 \$280,000	\$5 \$250,000	\$15 \$730,000	\$9 \$740,000	\$8 \$5 \$590,000
FF&E/Tenant Improvements	\$5 \$400,000	\$5 \$250,000	\$38 \$1,900,000	\$33 \$2,660,000	\$29 \$18 \$2,190,000
Permits & Fees ⁽³⁾	\$8 \$619,900	\$25 \$1,225,100	\$52 \$2,596,200	\$71 \$5,717,700	\$22 \$13 \$1,625,800
Other Indirects & Financing	\$22 \$1,730,000	\$31 \$1,540,000	\$48 \$2,420,000	\$48 \$3,830,000	\$35 \$21 \$2,590,000
Total Indirects & Financing	\$38 \$3,029,900	\$65 \$3,265,100	\$153 \$7,646,200	\$162 \$12,947,700	\$93 \$56 \$6,995,800
Total Costs	\$238 \$19,009,900	\$339 \$16,945,100	\$533 \$26,646,200	\$527 \$42,147,700	\$379 \$228 \$28,445,800
Total Cost Range (+/-10%)	\$215-\$260/sf	\$305-\$375/sf	\$480-\$585/sf	\$475-\$580/sf	\$340-\$415/sf

⁽¹⁾ Land acquisition costs estimated based on recent land sale comps adjusted for building FAR.

⁽²⁾ Direct construction cost estimates from RS Means, Saylor Current Construction Costs (2020), and other project pro formas.

⁽³⁾ Water/sewer fees excluded due to current moratorium on new water connections. See Appendix A Table A-4

Appendix A Table A-3
Fees as % of Average Total Development Cost
Non-Residential Fee Context
Goleta, CA

Fees as % of Total Development Cost								
	<i>Total Dev Cost Per GSF</i>	<i>Illustrative Linkage Fees (\$/GSF) as a Percent of Total Dev Cost</i>						
		\$2	\$4	\$6	\$8	\$10	\$12	\$15
Warehouse / Distribution	\$238/GSF	0.8%	1.7%	2.5%	3.4%	4.2%	5.1%	6.3%
Business Park	\$339/GSF	0.6%	1.2%	1.8%	2.4%	3.0%	3.5%	4.4%
Medical Office	\$533/GSF	0.4%	0.8%	1.1%	1.5%	1.9%	2.3%	2.8%
Nbhd. Shopping Center	\$527/GSF	0.4%	0.8%	1.1%	1.5%	1.9%	2.3%	2.8%
Hotel	\$379/GSF	0.5%	1.1%	1.6%	2.1%	2.6%	3.2%	4.0%

key: up to 1% 1-2% 2-3% over 3%

Appendix A Table A-4
Estimated Fees Applicable to Non-Residential Development Prototypes in City of Goleta
Non-Residential Fee Context
Goleta, CA

Non-Residential Prototype	Warehouse / Distribution		Business Park: Office/ R&D/ Lt. Ind. ⁽¹⁾		Medical Office		Neighborhood Shopping Center		Hotel		
Gross Building Area	80,000 sf		50,000 sf		50,000 sf		80,000 sf		75,000 sf		
Hotel Rooms	n/a		n/a		n/a		n/a		125 rooms		600sf/rm
Building Valuation/ GSF ⁽²⁾	\$80 /GSF		\$125 /GSF		\$145 /GSF		\$110 /GSF		\$145 /GSF		
Net Peak PM Trips/ 1,000 SF ⁽³⁾	0.19 /KSF		1.21 /KSF		3.21 /KSF		4.98 /KSF		0.96 /KSF		
Water ERU / 1,000 SF ⁽⁴⁾	0.12 /KSF		0.23 /KSF		0.25 /KSF		0.50 /KSF		0.67 /KSF		
	<u>\$/SF</u>	<u>Total</u>	<u>\$/SF</u>	<u>Total</u>	<u>\$/SF</u>	<u>Total</u>	<u>\$/SF</u>	<u>Total</u>	<u>\$/SF</u>	<u>\$000/rm</u>	<u>Total</u>
Permit & Processing Fees											
Planning Fees ⁽⁵⁾	\$0.68	\$54,200	\$1.06	\$52,900	\$1.23	\$61,400	\$0.93	\$74,500	\$1.23	\$1	\$92,100
Building Fees ⁽⁶⁾	\$1.02	\$81,200	\$1.59	\$79,300	\$1.84	\$92,000	\$1.40	\$111,700	\$1.84	\$1	\$138,100
Subtotal, Permit & Processing	\$1.69	\$135,400	\$2.64	\$132,200	\$3.07	\$153,400	\$2.33	\$186,200	\$3.07	\$2	\$230,200
City Impact Fees											
Public Administration	\$0.25	\$19,700	\$0.50	\$24,800	\$0.66	\$33,100	\$0.49	\$39,400	\$0.49	\$0	\$37,000
Library	\$0.08	\$6,200	\$0.15	\$7,700	\$0.21	\$10,300	\$0.15	\$12,300	\$0.15	\$0	\$11,600
Park Fee	\$0.95	\$75,700	\$1.91	\$95,400	\$2.55	\$127,500	\$1.90	\$151,900	\$1.90	\$1	\$142,400
Storm Drain	\$1.00	\$80,100	\$2.02	\$101,000	\$2.70	\$134,900	\$2.01	\$160,600	\$2.01	\$1	\$150,600
Transportation ⁽³⁾	\$2.34	\$187,300	\$15.21	\$760,400	\$40.39	\$2,019,700	\$62.61	\$5,008,700	\$12.07	\$7	\$905,200
Bicycle and Pedestrian	\$0.25	\$19,700	\$0.50	\$24,800	\$0.66	\$33,200	\$0.49	\$39,500	\$0.49	\$0	\$37,100
Fire	\$0.59	\$47,000	\$0.97	\$48,300	\$1.07	\$53,600	\$0.88	\$70,300	\$0.88	\$1	\$65,900
Subtotal, City Impact Fees	\$5.45	\$435,700	\$21.25	\$1,062,400	\$48.25	\$2,412,300	\$68.53	\$5,482,700	\$18.00	\$11	\$1,349,800
Other Agency Fees											
Sanitary Connection Fee ⁽⁴⁾	\$0.26	\$20,500	\$0.51	\$25,600	\$0.55	\$27,500	\$1.10	\$87,900	\$1.47	\$1	\$109,900
Water Connection Fee ⁽⁷⁾	\$0.95	\$76,400	\$1.91	\$95,500	\$2.05	\$102,300	\$4.09	\$327,300	\$5.46	\$3	\$409,200
School Fees	\$0.61	\$48,800	\$0.61	\$30,500	\$0.61	\$30,500	\$0.61	\$48,800	\$0.61	\$0	\$45,800
Subtotal, Other Agency Fees	\$1.82	\$145,700	\$3.03	\$151,600	\$3.21	\$160,300	\$5.80	\$464,000	\$7.53	\$5	\$564,900
Total, All Fees	\$8.96	\$716,800	\$26.92	\$1,346,200	\$54.52	\$2,726,000	\$76.66	\$6,132,900	\$28.60	\$17	\$2,144,900
Excluding Water & Sewer	\$7.75	\$619,900	\$24.50	\$1,225,100	\$51.92	\$2,596,200	\$71.47	\$5,717,700	\$21.68	\$13	\$1,625,800

Source: City of Goleta, Goleta Sanitary District, Goleta Water District, Urban Economics, Goleta Union School District, Santa Barbara Unified School District

⁽¹⁾ Fees differentiated by land use reflect are weighted 60% to office/R&D and 40% to warehouse/ light industrial.

⁽²⁾ Based on RS Means cost estimate excluding general contractor markups.

⁽³⁾ The Transportation impact fee is \$12,572 per net PM peak trip. Net PM peak trips assume a reduction for passby trips, based on the 2019 fee study by Urban Economics .

⁽⁴⁾ The Goleta Sanitary District connection fee is \$2,198 per equivalent residential unit (ERU). ERUs are estimated based on water demand tables included Goleta's CEQA guidelines.

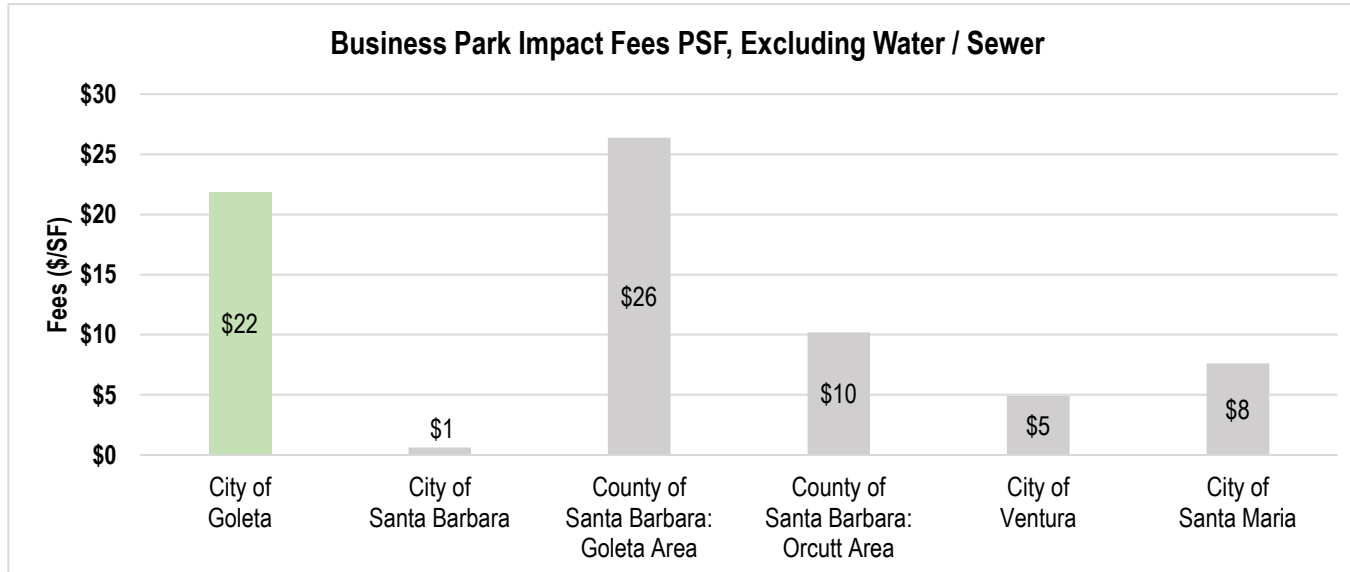
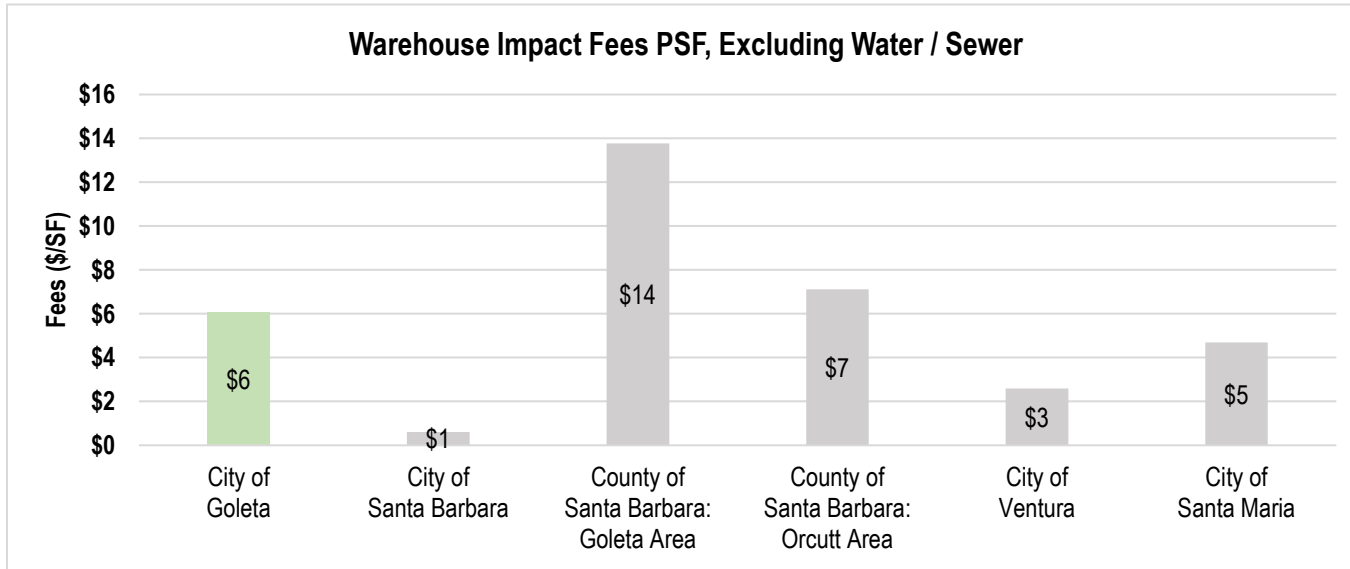
⁽⁵⁾ Planning fees are estimated to be 0.8% of the building permit valuation, based on recent projects.

⁽⁶⁾ Building fees are estimated to be 1.3% of the building permit valuation, based on recent projects.

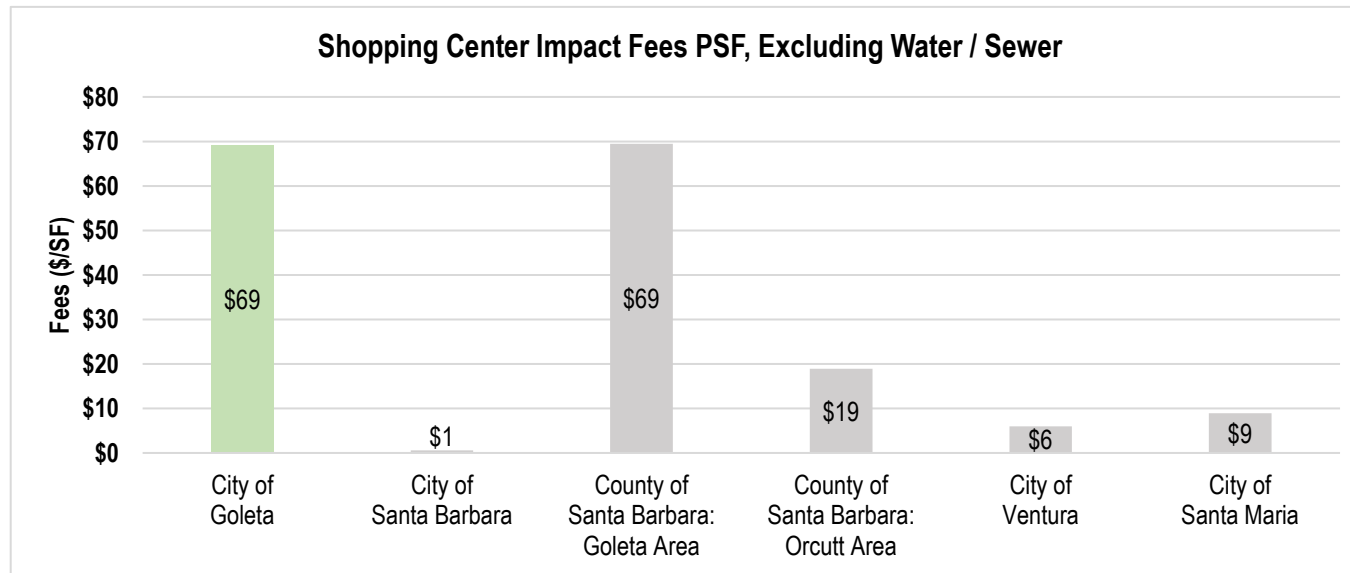
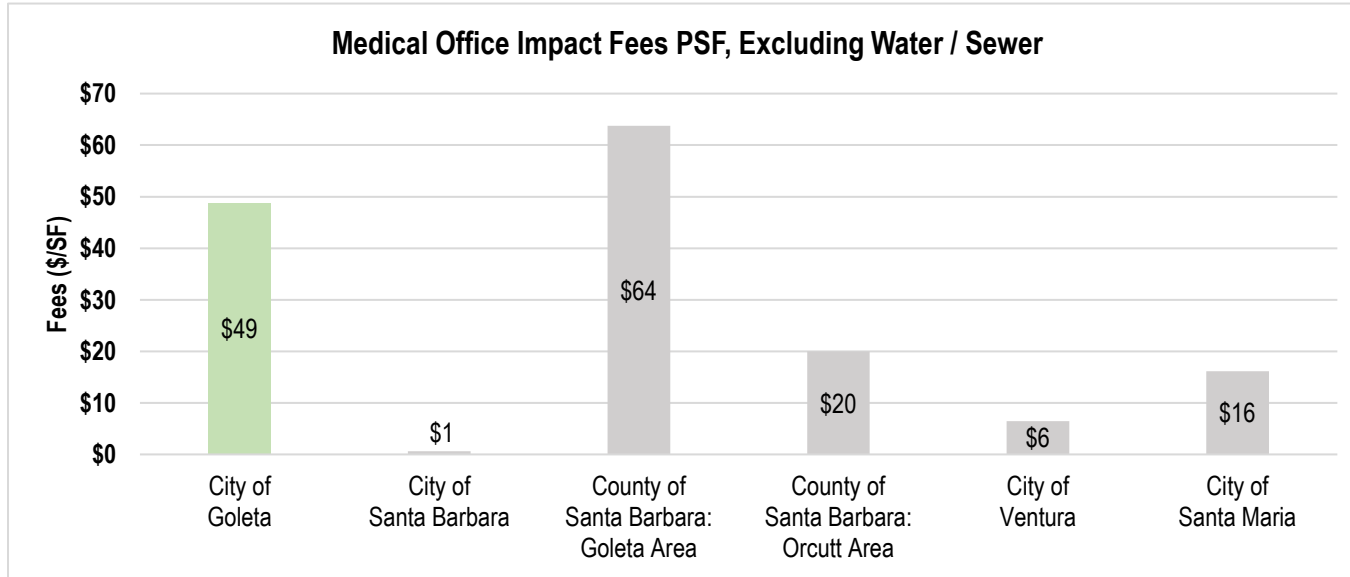
⁽⁷⁾ Goleta Water District supply charge is approx. \$40,000 per acre-foot of annual demand (assuming 80% potable and 20% recycled). Currently, there is a moratorium on new water connections.

The water fee estimate reflects the ERU demand factors used to estimate the sanitary connection fee (see footnote 4). No credits are assumed for previously purchased allocations.

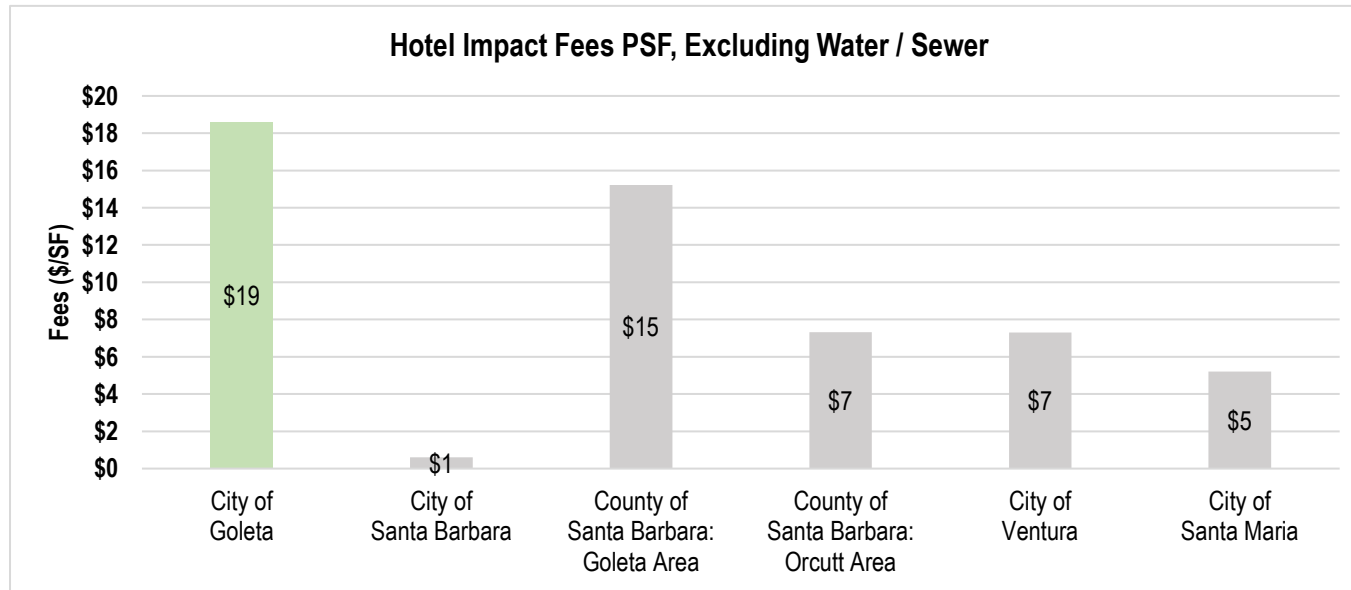
Appendix A Table A-5
Total Impact Fee Charts: Goleta versus Comparison Jurisdictions
Non-Residential Fee Context
Goleta, CA



Appendix A Table A-5
Total Impact Fee Charts: Goleta versus Comparison Jurisdictions
Non-Residential Fee Context
Goleta, CA



Appendix A Table A-5
Total Impact Fee Charts: Goleta versus Comparison Jurisdictions
Non-Residential Fee Context
Goleta, CA



Appendix A Table A-6
Impact Fee Comparison Summary
Non-Residential Fee Context
Goleta, CA

	City of Goleta	City of Santa Barbara ⁽¹⁾	County of Santa Barbara: Goleta Area	County of Santa Barbara: Orcutt Area	City of Ventura	City of Santa Maria
Warehouse (Table 7)						
Gross Square Feet	80,000	80,000	80,000	80,000	80,000	80,000
Impact Fees PSF, Excl. Water/Sewer	\$6.06	\$0.61	\$13.77	\$7.11	\$2.59	\$4.69
Impact Fees PSF, Incl. Water/Sewer ⁽²⁾	\$7.27	\$1.45	\$14.98	\$8.70	\$11.65	\$5.65
Business Park (Table 8)						
Gross Square Feet	50,000	50,000	50,000	50,000	50,000	50,000
Impact Fees PSF, Excl. Water/Sewer	\$21.86	\$0.61	\$26.37	\$10.20	\$4.92	\$7.62
Impact Fees PSF, Incl. Water/Sewer ⁽²⁾	\$24.28	\$1.95	\$28.80	\$13.37	\$14.29	\$9.15
Medical Office (Table 9)						
Gross Square Feet	50,000	50,000	50,000	50,000	50,000	50,000
Impact Fees PSF, Excl. Water/Sewer	\$48.86	\$0.61	\$63.74	\$19.98	\$6.47	\$16.15
Impact Fees PSF, Incl. Water/Sewer ⁽²⁾	\$51.45	\$1.95	\$66.34	\$23.37	\$15.84	\$17.68
Shopping Center (Table 10)						
Gross Square Feet	80,000	80,000	80,000	80,000	80,000	80,000
Impact Fees PSF, Excl. Water/Sewer	\$69.14	\$0.61	\$69.48	\$18.89	\$5.95	\$8.89
Impact Fees PSF, Incl. Water/Sewer ⁽²⁾	\$74.33	\$1.45	\$74.67	\$25.68	\$15.01	\$9.85
Hotel (Table 11)						
Gross Square Feet	75,000	75,000	75,000	75,000	75,000	75,000
Impact Fees PSF, Excl. Water/Sewer	\$18.61	\$0.61	\$15.22	\$7.32	\$7.31	\$5.20
Impact Fees PSF, Incl. Water/Sewer ⁽²⁾	\$25.53	\$1.51	\$22.14	\$16.38	\$16.40	\$6.22

Source: Fee schedules for comparison jurisdictions

Note: Comparison only reflects impact fees. Permit and processing fees, CEQA mitigation costs, and other development exactions are excluded.

⁽¹⁾ The city of Santa Barbara does not have a standardized development fee schedule. Projects may be required to offset development impacts through CEQA mitigation measures. These costs are not included in the fee comparison as they vary significantly by project.

⁽²⁾ Water and sewer fee estimates do not assume any credits for existing service or water conservation measures. In all jurisdictions, water and sewer fees are likely to be less than estimated for infill development, which has comprised all recent permitting activity in Goleta due to the moratorium on new water connections.

Appendix A Table A-7
Impact Fee Comparison: Warehouse Prototype
Non-Residential Fee Context
Goleta, CA

	City of Goleta	City of Santa Barbara	County of Santa Barbara: Goleta Area	County of Santa Barbara: Orcutt Area	City of Ventura	City of Santa Maria
Warehouse						
Gross Square Feet	80,000	80,000	80,000	80,000	80,000	80,000
Local Impact Fees						
Roads/Transit/Mobility	\$207,000	\$0	\$641,440	\$220,480	\$119,280	\$270,320
Fire	\$47,000	\$0	\$41,600	\$41,600	\$35,200	\$6,400
Parks	\$75,700	\$0	\$225,440	\$157,280	\$0	\$800
School District	\$48,800	\$48,800	\$45,520	\$25,600	\$52,800	\$48,800
Other Public Facilities	\$25,900	\$0	\$147,840	\$124,000	\$0	\$48,800
Drainage	<u>\$80,100</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>
<i>Total, Excl. Water & Sewer</i>	<i>\$484,500</i>	<i>\$48,800</i>	<i>\$1,101,840</i>	<i>\$568,960</i>	<i>\$207,280</i>	<i>\$375,120</i>
Water	\$76,400	\$47,805	\$20,515	\$48,092	\$707,567	\$48,635
Sewer	<u>\$20,500</u>	<u>\$19,427</u>	<u>\$76,380</u>	<u>\$78,671</u>	<u>\$17,271</u>	<u>\$27,941</u>
<i>Total, Incl. Water & Sewer</i>	<i>\$581,400</i>	<i>\$116,032</i>	<i>\$1,198,735</i>	<i>\$695,722</i>	<i>\$932,118</i>	<i>\$451,696</i>
Fees PSF						
Roads/Transit/Mobility	\$2.59	\$0.00	\$8.02	\$2.76	\$1.49	\$3.38
Fire	\$0.59	\$0.00	\$0.52	\$0.52	\$0.44	\$0.08
Parks	\$0.95	\$0.00	\$2.82	\$1.97	\$0.00	\$0.01
School District	\$0.61	\$0.61	\$0.57	\$0.32	\$0.66	\$0.61
Other Public Facilities	\$0.32	\$0.00	\$1.85	\$1.55	\$0.00	\$0.61
Drainage	<u>\$1.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>
<i>Total, Excl. Water & Sewer</i>	<i>\$6.06</i>	<i>\$0.61</i>	<i>\$13.77</i>	<i>\$7.11</i>	<i>\$2.59</i>	<i>\$4.69</i>
Water	\$0.96	\$0.60	\$0.26	\$0.60	\$8.84	\$0.61
Sewer	<u>\$0.26</u>	<u>\$0.24</u>	<u>\$0.95</u>	<u>\$0.98</u>	<u>\$0.22</u>	<u>\$0.35</u>
<i>Total, Incl. Water & Sewer</i>	<i>\$7.27</i>	<i>\$1.45</i>	<i>\$14.98</i>	<i>\$8.70</i>	<i>\$11.65</i>	<i>\$5.65</i>

Source: Fee schedules for comparison jurisdictions

Note: Comparison only reflects impact fees. Permit and processing fees, CEQA mitigation costs, and other development exactions are excluded.

Appendix A Table A-8
Impact Fee Comparison: Business Park Prototype
Non-Residential Fee Context
Goleta, CA

Business Park	City of Goleta	City of Santa Barbara	County of Santa Barbara: Goleta Area	County of Santa Barbara: Orcutt Area	City of Ventura	City of Santa Maria
Gross Square Feet	50,000	50,000	50,000	50,000	50,000	50,000
Local Impact Fees						
Roads/Transit/Mobility	\$785,200	\$0	\$1,014,500	\$275,650	\$175,500	\$315,260
Fire	\$48,300	\$0	\$42,400	\$42,400	\$37,300	\$4,000
Parks	\$95,400	\$0	\$140,900	\$98,300	\$0	\$500
School District	\$30,500	\$30,500	\$28,450	\$16,000	\$33,000	\$30,500
Other Public Facilities	\$32,500	\$0	\$92,400	\$77,500	\$0	\$30,500
<u>Drainage</u>	<u>\$101,000</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>
<i>Total, Excl. Water & Sewer</i>	<i>\$1,092,900</i>	<i>\$30,500</i>	<i>\$1,318,650</i>	<i>\$509,850</i>	<i>\$245,800</i>	<i>\$380,760</i>
Water	\$95,500	\$47,805	\$25,643	\$60,114	\$451,607	\$48,635
<u>Sewer</u>	<u>\$25,600</u>	<u>\$19,427</u>	<u>\$95,475</u>	<u>\$98,338</u>	<u>\$17,271</u>	<u>\$27,941</u>
<i>Total, Incl. Water & Sewer</i>	<i>\$1,214,000</i>	<i>\$97,732</i>	<i>\$1,439,768</i>	<i>\$668,303</i>	<i>\$714,678</i>	<i>\$457,336</i>
Fees PSF						
Roads/Transit/Mobility	\$15.70	\$0.00	\$20.29	\$5.51	\$3.51	\$6.31
Fire	\$0.97	\$0.00	\$0.85	\$0.85	\$0.75	\$0.08
Parks	\$1.91	\$0.00	\$2.82	\$1.97	\$0.00	\$0.01
School District	\$0.61	\$0.61	\$0.57	\$0.32	\$0.66	\$0.61
Other Public Facilities	\$0.65	\$0.00	\$1.85	\$1.55	\$0.00	\$0.61
<u>Drainage</u>	<u>\$2.02</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>
<i>Total, Excl. Water & Sewer</i>	<i>\$21.86</i>	<i>\$0.61</i>	<i>\$26.37</i>	<i>\$10.20</i>	<i>\$4.92</i>	<i>\$7.62</i>
Water	\$1.91	\$0.96	\$0.51	\$1.20	\$9.03	\$0.97
<u>Sewer</u>	<u>\$0.51</u>	<u>\$0.39</u>	<u>\$1.91</u>	<u>\$1.97</u>	<u>\$0.35</u>	<u>\$0.56</u>
<i>Total, Incl. Water & Sewer</i>	<i>\$24.28</i>	<i>\$1.95</i>	<i>\$28.80</i>	<i>\$13.37</i>	<i>\$14.29</i>	<i>\$9.15</i>

Source: Fee schedules for comparison jurisdictions

Note: Comparison only reflects impact fees. Permit and processing fees, CEQA mitigation costs, and other development exactions are excluded.

Appendix A Table A-9
Impact Fee Comparison: Medical Office Prototype
Non-Residential Fee Context
Goleta, CA

	City of Goleta	City of Santa Barbara	County of Santa Barbara: Goleta Area	County of Santa Barbara: Orcutt Area	City of Ventura	City of Santa Maria
Medical Office						
Gross Square Feet	50,000	50,000	50,000	50,000	50,000	50,000
Local Impact Fees						
Roads/Transit/Mobility	\$2,052,900	\$0	\$2,878,250	\$760,100	\$242,800	\$742,050
Fire	\$53,600	\$0	\$47,000	\$47,000	\$47,500	\$4,000
Parks	\$127,500	\$0	\$140,900	\$98,300	\$0	\$500
School District	\$30,500	\$30,500	\$28,450	\$16,000	\$33,000	\$30,500
Other Public Facilities	\$43,400	\$0	\$92,400	\$77,500	\$0	\$30,500
Drainage	\$134,900	\$0	\$0	\$0	\$0	\$0
<i>Total, Excl. Water & Sewer</i>	<i>\$2,442,800</i>	<i>\$30,500</i>	<i>\$3,187,000</i>	<i>\$998,900</i>	<i>\$323,300</i>	<i>\$807,550</i>
Water	\$102,300	\$47,805	\$27,475	\$64,408	\$451,607	\$48,635
Sewer	\$27,500	\$19,427	\$102,295	\$105,363	\$17,271	\$27,941
<i>Total, Incl. Water & Sewer</i>	<i>\$2,572,600</i>	<i>\$97,732</i>	<i>\$3,316,770</i>	<i>\$1,168,671</i>	<i>\$792,178</i>	<i>\$884,126</i>
Fees PSF						
Roads/Transit/Mobility	\$41.06	\$0.00	\$57.57	\$15.20	\$4.86	\$14.84
Fire	\$1.07	\$0.00	\$0.94	\$0.94	\$0.95	\$0.08
Parks	\$2.55	\$0.00	\$2.82	\$1.97	\$0.00	\$0.01
School District	\$0.61	\$0.61	\$0.57	\$0.32	\$0.66	\$0.61
Other Public Facilities	\$0.87	\$0.00	\$1.85	\$1.55	\$0.00	\$0.61
<u>Drainage</u>	<u>\$2.70</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>
<i>Total, Excl. Water & Sewer</i>	<i>\$48.86</i>	<i>\$0.61</i>	<i>\$63.74</i>	<i>\$19.98</i>	<i>\$6.47</i>	<i>\$16.15</i>
Water	\$2.05	\$0.96	\$0.55	\$1.29	\$9.03	\$0.97
<u>Sewer</u>	<u>\$0.55</u>	<u>\$0.39</u>	<u>\$2.05</u>	<u>\$2.11</u>	<u>\$0.35</u>	<u>\$0.56</u>
<i>Total, Incl. Water & Sewer</i>	<i>\$51.45</i>	<i>\$1.95</i>	<i>\$66.34</i>	<i>\$23.37</i>	<i>\$15.84</i>	<i>\$17.68</i>

Source: Fee schedules for comparison jurisdictions

Note: Comparison only reflects impact fees. Permit and processing fees, CEQA mitigation costs, and other development exactions are excluded.

Appendix A Table A-10
Impact Fee Comparison: Shopping Center Prototype
Non-Residential Fee Context
Goleta, CA

	City of Goleta	City of Santa Barbara	County of Santa Barbara: Goleta Area	County of Santa Barbara: Orcutt Area	City of Ventura	City of Santa Maria
Shopping Center						
Gross Square Feet	80,000	80,000	80,000	80,000	80,000	80,000
Local Impact Fees						
Roads/Transit/Mobility	\$5,048,200	\$0	\$5,199,920	\$1,231,840	\$374,720	\$606,320
Fire	\$70,300	\$0	\$61,600	\$61,600	\$48,800	\$6,400
Parks	\$151,900	\$0	\$160,000	\$111,680	\$0	\$800
School District	\$48,800	\$48,800	\$32,160	\$18,240	\$52,800	\$48,800
Other Public Facilities	\$51,700	\$0	\$104,640	\$87,760	\$0	\$48,800
<u>Drainage</u>	<u>\$160,600</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>
<i>Total, Excl. Water & Sewer</i>	<i>\$5,531,500</i>	<i>\$48,800</i>	<i>\$5,558,320</i>	<i>\$1,511,120</i>	<i>\$476,320</i>	<i>\$711,120</i>
Water	\$327,300	\$47,805	\$87,920	\$206,107	\$707,567	\$48,635
<u>Sewer</u>	<u>\$87,900</u>	<u>\$19,427</u>	<u>\$327,343</u>	<u>\$337,160</u>	<u>\$17,271</u>	<u>\$27,941</u>
<i>Total, Incl. Water & Sewer</i>	<i>\$5,946,700</i>	<i>\$116,032</i>	<i>\$5,973,583</i>	<i>\$2,054,387</i>	<i>\$1,201,158</i>	<i>\$787,696</i>
Fees PSF						
Roads/Transit/Mobility	\$63.10	\$0.00	\$65.00	\$15.40	\$4.68	\$7.58
Fire	\$0.88	\$0.00	\$0.77	\$0.77	\$0.61	\$0.08
Parks	\$1.90	\$0.00	\$2.00	\$1.40	\$0.00	\$0.01
School District	\$0.61	\$0.61	\$0.40	\$0.23	\$0.66	\$0.61
Other Public Facilities	\$0.65	\$0.00	\$1.31	\$1.10	\$0.00	\$0.61
<u>Drainage</u>	<u>\$2.01</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>
<i>Total, Excl. Water & Sewer</i>	<i>\$69.14</i>	<i>\$0.61</i>	<i>\$69.48</i>	<i>\$18.89</i>	<i>\$5.95</i>	<i>\$8.89</i>
Water	\$4.09	\$0.60	\$1.10	\$2.58	\$8.84	\$0.61
<u>Sewer</u>	<u>\$1.10</u>	<u>\$0.24</u>	<u>\$4.09</u>	<u>\$4.21</u>	<u>\$0.22</u>	<u>\$0.35</u>
<i>Total, Incl. Water & Sewer</i>	<i>\$74.33</i>	<i>\$1.45</i>	<i>\$74.67</i>	<i>\$25.68</i>	<i>\$15.01</i>	<i>\$9.85</i>

Source: Fee schedules for comparison jurisdictions

Note: Comparison only reflects impact fees. Permit and processing fees, CEQA mitigation costs, and other development exactions are excluded.

Appendix A Table A-11
Impact Fee Comparison: Hotel Prototype
Non-Residential Fee Context
Goleta, CA

Hotel	City of Goleta	City of Santa Barbara	County of Santa Barbara: Goleta Area	County of Santa Barbara: Orcutt Area	City of Ventura	City of Santa Maria
Gross Square Feet	75,000	75,000	75,000	75,000	75,000	75,000
Local Impact Fees						
Roads/Transit/Mobility	\$942,300	\$0	\$690,900	\$203,850	\$452,625	\$291,750
Fire	\$65,900	\$0	\$57,750	\$57,750	\$45,750	\$6,000
Parks	\$142,400	\$0	\$211,350	\$147,450	\$0	\$750
School District	\$45,800	\$45,750	\$42,675	\$24,000	\$49,500	\$45,750
Other Public Facilities	\$48,600	\$0	\$138,600	\$116,250	\$0	\$45,750
<u>Drainage</u>	<u>\$150,600</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>	<u>\$0</u>
<i>Total, Excl. Water & Sewer</i>	<i>\$1,395,600</i>	<i>\$45,750</i>	<i>\$1,141,275</i>	<i>\$549,300</i>	<i>\$547,875</i>	<i>\$390,000</i>
Water	\$409,200	\$47,805	\$109,900	\$257,633	\$664,907	\$48,635
<u>Sewer</u>	<u>\$109,900</u>	<u>\$19,427</u>	<u>\$409,179</u>	<u>\$421,450</u>	<u>\$17,271</u>	<u>\$27,941</u>
<i>Total, Incl. Water & Sewer</i>	<i>\$1,914,700</i>	<i>\$112,982</i>	<i>\$1,660,354</i>	<i>\$1,228,383</i>	<i>\$1,230,053</i>	<i>\$466,576</i>
Fees PSF						
Roads/Transit/Mobility	\$12.56	\$0.00	\$9.21	\$2.72	\$6.04	\$3.89
Fire	\$0.88	\$0.00	\$0.77	\$0.77	\$0.61	\$0.08
Parks	\$1.90	\$0.00	\$2.82	\$1.97	\$0.00	\$0.01
School District	\$0.61	\$0.61	\$0.57	\$0.32	\$0.66	\$0.61
Other Public Facilities	\$0.65	\$0.00	\$1.85	\$1.55	\$0.00	\$0.61
<u>Drainage</u>	<u>\$2.01</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>
<i>Total, Excl. Water & Sewer</i>	<i>\$18.61</i>	<i>\$0.61</i>	<i>\$15.22</i>	<i>\$7.32</i>	<i>\$7.31</i>	<i>\$5.20</i>
Water	\$5.46	\$0.64	\$1.47	\$3.44	\$8.87	\$0.65
<u>Sewer</u>	<u>\$1.47</u>	<u>\$0.26</u>	<u>\$5.46</u>	<u>\$5.62</u>	<u>\$0.23</u>	<u>\$0.37</u>
<i>Total, Incl. Water & Sewer</i>	<i>\$25.53</i>	<i>\$1.51</i>	<i>\$22.14</i>	<i>\$16.38</i>	<i>\$16.40</i>	<i>\$6.22</i>

Source: Fee schedules for comparison jurisdictions

Note: Comparison only reflects impact fees. Permit and processing fees, CEQA mitigation costs, and other development exactions are excluded.

Appendix A Table A-12**Cumulative Non-Residential Development Activity in Goleta and Santa Barbara County (2010-2020)****Non-Residential Fee Context****Goleta, CA**

											YTD
Cumulative Deliveries (SF 000s) ⁽¹⁾	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Goleta											
Office	0	0	0	0	157	157	209	209	209	209	209
Industrial	0	0	0	0	30	30	30	30	30	30	30
Retail	0	0	0	0	0	36	80	80	80	80	80
Hotel	0	0	69	69	69	69	69	225	225	225	225
Santa Barbara County											
Office	17	17	69	87	244	244	371	397	418	430	438
Industrial	18	18	18	18	60	294	368	372	715	757	757
Retail	116	116	184	252	319	362	522	865	1,011	1,021	1,028
Hotel	0	0	94	94	112	112	112	494	504	725	748
Goleta Share of County											
Office	0%	0%	0%	0%	64%	64%	56%	53%	50%	49%	48%
Industrial	0%	0%	0%	0%	50%	10%	8%	8%	4%	4%	4%
Retail	0%	0%	0%	0%	0%	10%	15%	9%	8%	8%	8%
Hotel	0%	0%	74%	74%	61%	61%	61%	46%	45%	31%	30%

Source: Costar (10/20/2020), STR

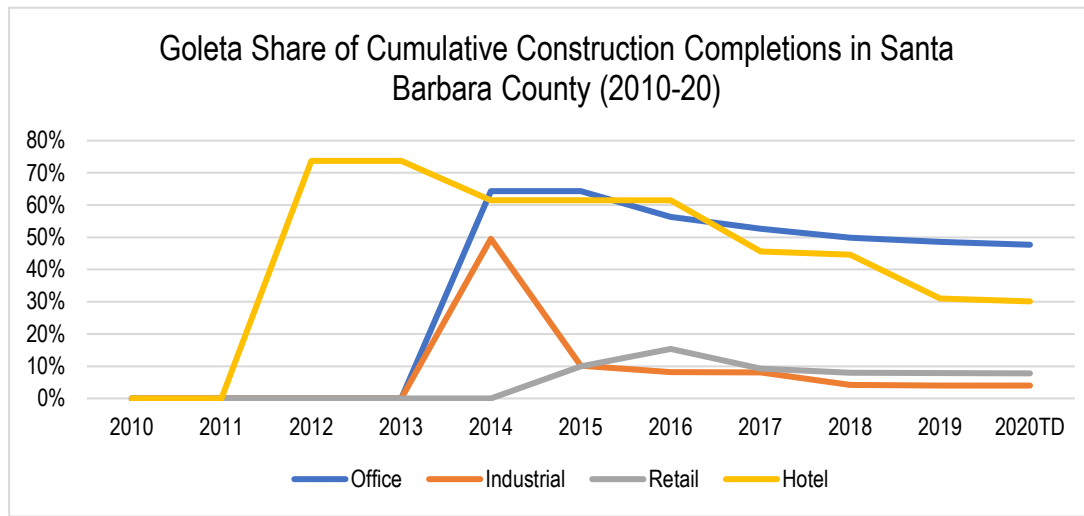
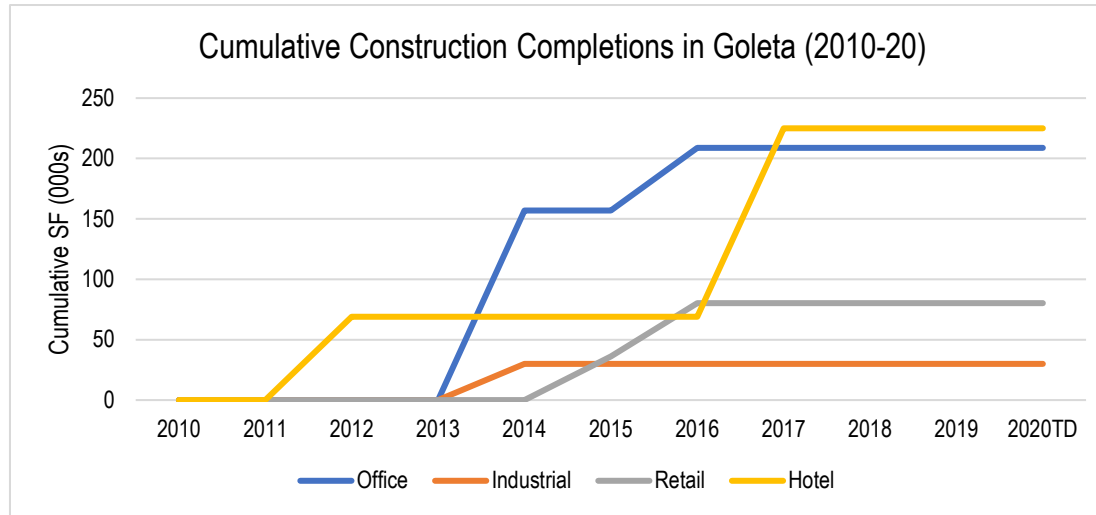
⁽¹⁾ See Tables 14 to 17. Hotel square feet estimated at 600sf/room.

Appendix A Table A-12

Cumulative Non-Residential Development Activity in Goleta and Santa Barbara County (2010-2020)

Non-Residential Fee Context

Goleta, CA



Appendix A Table A-13
Commercial Properties in Goleta - Built Since 2002 and Under Construction/ Proposed
Non-Residential Fee Context
Goleta, CA

<u>Property Address</u>	<u>Status⁽¹⁾</u>	<u>Year</u> <u>Built</u>	<u>SF</u>	<u>Stories</u>	<u>FAR</u>	<u>Parking</u>	<u>Comments</u>
Retail							
180 N. Fairview Ave	P	TBD	2,396	1	0.20	Surface	Convenience
Hollister Village Plaza		2015-16	80,252	1	0.25	Surface	Shopping cntr.
7020 Calle Real		2006	2,984	1	0.13	Surface	Grocery
Office/R&D							
Cabrillo BP Lots 5-7	P	TBD	78,803	2	0.34	Surface	R&D/ Flex
Cabrillo BP Lot 9	UC	2020	49,821	2	0.36	Surface	R&D/ Flex
Cottage MOB	P	TBD	20,000	2	0.31	Surface	Medical office
351 S Patterson Ave		2016	52,000	2	0.59	Surface	Medical office
Deckers Corporate HQ		2014	156,818	2	0.31	Surface	Owner occupied
420 S Fairview Ave		2008	72,200	2	0.36	Surface	Multi-tenant
Industrial							
355 Coromar Dr	P	TBD	77,394	1	0.28	Surface	WH /Distribution
Deckers Bldg 3		2014	29,970	1	0.31	Surface	WH /Distribution
747 S Kellogg Ave		2008	3,635	1	0.31	Surface	WH /Distribution
Hotel							
Calle Real Hotel	P	TBD	61,367	3	0.66	Surface	132 rooms
Residence Inn		2017	80,000	3	0.48	Surface	118 rooms
Hilton Garden Inn		2017	86,794	3	0.65	Surface	142 rooms
Courtyard by Marriott		2012	68,000	2	0.52	Surface	115 rooms
Hampton Inn		2007	37,998	2	0.48	Surface	101 rooms

Source: Costar (10/20/2020), STR, KMA research, City of Goleta

⁽¹⁾ UC = Under Construction; P = Planned or Proposed

Appendix A Table A-14
Office Real Estate Trends (2010-2020)
Non-Residential Fee Context
Goleta, CA

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	YTD 2020
Goleta											
Inventory (SF 000s)	2,258	2,258	2,258	2,258	2,415	2,415	2,467	2,467	2,467	2,467	2,467
Ann. Deliveries (SF 000s)	0	0	0	0	157	0	52	0	0	0	0
Ann. Net Absorption (SF 000s)	1	-9	39	-45	191	-36	98	-39	78	5	-47
Total Vacancy %	7.4%	7.8%	6.1%	8.1%	6.1%	7.6%	5.6%	7.1%	4.0%	3.8%	5.7%
Asking Rent/SF (Base Direct)	\$1.52	\$1.51	\$1.49	\$1.48	\$1.47	\$1.46	\$1.54	\$1.57	\$1.49	\$1.63	\$1.59
Santa Barbara County											
Inventory (SF 000s)	12,443	12,443	12,489	12,507	12,663	12,663	12,790	12,794	12,815	12,827	12,782
Ann. Deliveries (SF 000s)	17	0	52	18	157	0	127	26	22	12	8
Ann. Net Absorption (SF 000s)	66	3	2	-127	287	-71	419	-68	49	-77	-235
Total Vacancy %	4.6%	4.6%	4.9%	6.1%	5.0%	5.5%	3.2%	3.8%	3.5%	4.2%	5.7%
Asking Rent/SF (Base Direct)	\$1.68	\$1.68	\$1.60	\$1.48	\$1.62	\$1.56	\$1.78	\$1.88	\$1.86	\$1.98	\$1.83

Source: Costar (10/20/2020)

Appendix A Table A-15
Industrial Real Estate Trends (2010-2020)
Non-Residential Fee Context
Goleta, CA

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	YTD 2020
Goleta											
Inventory (SF 000s)	1,869	1,869	1,869	1,869	1,898	1,898	1,898	1,898	1,898	1,898	1,898
Ann. Deliveries (SF 000s)	0	0	0	0	30	0	0	0	0	0	0
Ann. Net Absorption (SF 000s)	29	20	5	14	150	2	11	-13	-69	-3	-65
Total Vacancy %	4.9%	3.8%	3.6%	2.8%	2.2%	2.1%	1.6%	2.2%	5.7%	5.8%	9.1%
Asking Rent/SF (NNN Direct)	\$0.89	\$0.86	\$0.85	\$0.88	\$1.01	\$1.23	\$1.15	\$1.21	\$1.08	\$1.12	\$1.09
Santa Barbara County											
Inventory (SF 000s)	12,103	12,103	12,103	12,103	12,145	12,373	12,446	12,449	12,778	12,819	12,819
Ann. Deliveries (SF 000s)	18	0	0	0	42	234	73	5	343	42	0
Ann. Net Absorption (SF 000s)	45	244	155	-83	163	198	207	-96	161	121	-44
Total Vacancy %	7.1%	4.4%	3.6%	3.9%	3.6%	3.4%	2.0%	2.9%	4.8%	3.5%	4.2%
Asking Rent/SF (NNN Direct)	\$0.72	\$0.73	\$0.73	\$0.75	\$0.79	\$0.79	\$0.85	\$0.97	\$1.10	\$1.18	\$1.10

Source: Costar (10/20/2020)

Appendix A Table A-16
Retail Real Estate Trends (2010-2020)
Non-Residential Fee Context
Goleta, CA

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	YTD 2020
Goleta											
Inventory (SF 000s)	1,930	1,930	1,930	1,930	1,930	1,966	2,010	2,010	2,010	2,010	2,010
Ann. Deliveries (SF 000s)	0	0	0	0	0	36	44	0	0	0	0
Ann. Net Absorption (SF 000s)	35	-39	44	3	4	-41	132	14	-4	-18	-2
Total Vacancy %	1.5%	3.5%	3.3%	3.1%	2.9%	6.7%	2.3%	1.7%	1.9%	2.8%	2.9%
Asking Rent/SF (NNN Direct)	\$2.37	\$2.11	\$2.35	\$2.32	\$2.51	\$2.67	\$2.46	\$2.29	\$2.74	\$2.80	\$2.59
Santa Barbara County											
Inventory (SF 000s)	23,746	23,746	23,795	23,839	23,910	23,924	24,084	24,426	24,568	24,588	24,595
Ann. Deliveries (SF 000s)	116	0	67	69	67	43	160	343	146	10	7
Ann. Net Absorption (SF 000s)	193	-84	93	246	136	-23	380	64	-119	-38	13
Total Vacancy %	3.6%	3.9%	3.8%	2.9%	2.6%	2.8%	1.8%	2.9%	4.0%	4.1%	4.1%
Asking Rent/SF (NNN Direct)	\$1.84	\$1.84	\$1.89	\$1.99	\$1.99	\$2.10	\$2.13	\$2.17	\$1.98	\$1.97	\$2.15

Source: Costar (10/20/2020)

Appendix A Table A-17
Hotel Real Estate Trends (2010-2020)
Non-Residential Fee Context
Goleta, CA

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	YTD 2020
Goleta											
Total Room Supply ⁽¹⁾	691	691	806	806	806	806	806	1,066	1,066	1,066	1,066
New Rooms Delivered ⁽¹⁾	0	0	115	0	0	0	0	260	0	0	0
Market Occupancy					75%	80%	80%	76%	78%	79%	
Average Daily Rate					\$148	\$164	\$168	\$176	\$179	\$179	
RevPAR					\$111	\$131	\$134	\$134	\$140	\$141	
Santa Barbara County											
Total Room Supply ⁽¹⁾	9,168	9,168	9,324	9,324	9,355	9,355	9,355	9,991	10,008	10,376	10,414
New Rooms Delivered ⁽¹⁾	0	0	156	0	31	0	0	636	17	368	38
Market Occupancy					75%	77%	77%	75%	74%	74%	
Average Daily Rate					\$196	\$207	\$214	\$221	\$209	\$233	
RevPAR					\$148	\$160	\$165	\$165	\$154	\$173	

Source: STR, CBRE Hotels Advisory 2020 Southern California Lodging Forecast

⁽¹⁾ Room supply and rooms delivered per STR. All other data is from CBRE (2019 reflects an estimate from fall 2019).

Appendix A Table A-18
Recent Commercial Land Sales in Goleta
Non-Residential Fee Context
Goleta, CA

<u>Property</u>	<u>Sale</u>	<u>Land</u>	<u>FAR</u>	<u>Sale Price</u>			<u>Comments</u>
	<u>Year</u>	<u>Acres</u>		<u>Total (\$M)</u>	<u>/Land SF</u>	<u>/SF FAR</u>	
Cabrillo Business Park	2018	11.37	0.29	\$23.0M	\$46	\$159	Industrial/R&D
265 Pine Ave	2017	0.12	0.0	\$0.3M	\$56	N/A	Commercial (Parking)
6975 Santa Felicia Dr	2017	4.32	TBD	\$2.2M	\$12	TBD	Commercial
151 S Fairview Ave ⁽¹⁾	2017	0.80	0.22	\$3.3M	\$93	\$433	Commercial
6701 Hollister Ave	2016	3.72	0.34	\$7.3M	\$45	\$132	Office
5955 Calle Real	2015	1.98	0.64	\$4.7M	\$54	\$86	Hotel
355 Coromar Drive	2015	7.60	0.30	\$10.6M	\$32	\$108	WH/ Office

Source: Costar (10/20/2020), KMA research

⁽¹⁾ Fully entitled and with certain governmental fees pre-paid.

Appendix A Table A-19
Recent Commercial Building Sales in Goleta
Non-Residential Fee Context
Goleta, CA

Property	Year	Year	Sq Ft	Rooms	Sale Price			Cap
	Sold	Built			Total (\$M)	\$/SF	\$/Rm	Rate
Office								
5290 Overpass Rd	2020	1984	1,474		\$0.58	\$390		
801 S Kellogg Ave	2020	1965	17,237		\$2.85	\$165		
Castilian Tech. Cntr.	2019	2000	165,905		\$35.73	\$215		
130-132 Robin Hill	2019	2000	39,102		\$6.50	\$166		
420 S Fairview Ave	2019	2008	72,200		\$22.86	\$317		
University Bus. Cntr.	2019	1988	173,017		\$35.73	\$206		
6445 Calle Real	2019	1985	3,548		\$1.58	\$444		
142-144 Santa Felicia Dr	2018	1970	2,698		\$0.86	\$317		
Industrial								
1020 S Fairview Ave	2020	1962	3,442		\$0.60	\$174		
5814 Gaviota	2019	1960	2,023		\$0.35	\$171		
5902 Daley St	2019	1920	1,703		\$0.46	\$270		
75 Robin Hill Rd	2018	1966	112,621		\$27.00	\$240		
839 Ward Dr (Alloc.)	2018	1962	27,500		\$4.03	\$147		7.0%
92 Aero Camino	2017	1970	5,258		\$1.63	\$309		2.8%
5773 Dawson Ave	2017	N/A	2,540		\$0.59	\$230		
Retail								
5879 Hollister Ave	2018	2000	2,538		\$0.66	\$260		
5799 Hollister Ave	2017	2017R	9,000		\$4.61	\$512		4.7%
7020 Calle Real	2017	2006	2,984		\$1.90	\$637		
5836 Hollister Ave	2017	1955	8,164		\$1.55	\$190		
Hotels								
Super 8	2020	1961	18,638	65	\$6.93	\$372	\$107K	
Hampton Inn	2019	2007	37,998	101	\$29.58	\$778	\$293K	6.9%
Ritz-Carlton Bacara	2017	2000	431,326	358	\$380.00	\$881	\$1.1M	

Source: Costar (10/20/2020)

Appendix A Table A-20
Recent Residential Land Sales in Goleta
Non-Residential Fee Context
Goleta, CA

<u>Property</u>	<u>Sale</u>	<u>Land</u>	<u>Units</u>	<u>Sale Price</u>			<u>Comments</u>
	<u>Year</u>	<u>Acres</u>	<u>Per Acre</u>	<u>Total (\$M)</u>	<u>/Land SF</u>	<u>/Unit</u>	
Ocean Meadows	2020	6.41	6	\$3.6M	\$13	\$95,000	
6649 Abrego Rd	2019	0.18	17	\$0.3M	\$35	\$92,000	
7388 Calle Real	2018	1.02	10	\$4.0M	\$90	\$400,000	Partially completed
469 Kellogg Way	2018	2.49	13	\$4.4M	\$41	\$137,000	RV Storage

Source: Costar (10/20/2020)

Appendix A Table A-21**Schedule of Fee Credits for Delivery of Affordable Units.****Non-Residential Fee Context****Goleta, CA**

Credit for Provision of Affordable Units --- Credits Based on Nexus Maximums								
Type of Unit Provided	Square Feet of Development Credited for Fee Payment							
	Office	Medical	Retail / Commercial	Hotel	Industrial	R&D	Warehouse	Residential Care
Extremely Low Income	2,556	2,934	2,214	5,507	3,121	5,556	9,653	9,728
Very Low Income	1,554	1,784	1,346	3,348	1,898	3,378	5,869	5,914
Low Income	1,053	1,209	912	2,269	1,286	2,289	3,977	4,008
Moderate Income	2,260	2,594	1,957	4,868	2,759	4,911	8,533	8,599

Note: the above credits reflect nexus maximums. To determine a schedule of credits more reflective of adopted fees and which would provide an incentive for delivery of the affordable units, the following procedure may be used:

- a) determine the percentage of nexus maximum fee levels that are mitigated by the adopted fee.
- b) divide the above square footage figures by this amount.

For example, if adopted office fees mitigate 10% of nexus maximums, the credit provided for delivery of one extremely low income unit could be determined as $2,556 / 0.1 = 25,560$ square feet of fee payment credited for delivery of the unit.

Appendix B – Non-Residential Affordable Housing Fee Programs in Other Jurisdictions

APPENDIX B
SUMMARY OF NON-RESIDENTIAL AFFORDABLE HOUSING FEE PROGRAMS

Jurisdiction	Yr. Adopted/ Updated	Fee Level (per Sq.Ft. unless otherwise noted)	Thresholds & Exemptions	Build Option/ Other	Comments
SOUTHERN CALIFORNIA					
City of Los Angeles Population: 3,950,000	2017	Non-Residential - fee varies by zone Low \$3.11 Medium \$4.15 High \$5.19	15,000 SF threshold Governmental and public institutional uses developed for governmental or community use, private elementary or high school, hospitals, grocery stores not located within 1/3 mile of existing grocer stores, Central City West Specific Plan Area, South LA Transit Empowerment Zone.	N/A	Fees adjusted annually based on CPI.
City of Santa Monica Population: 92,000	1984 Updated 2002, 2015	Retail \$11.14 Office \$12.81 Hotel/Lodging \$3.51 Hospital \$7.02 Industrial \$8.61 Institutional \$11.69 Creative Office \$10.96 Medical Office \$7.88	1,000 SF threshold Private K-12 schools, city projects, places of worship, commercial components of affordable housing developments exempt.	N/A	Fees adjusted annually based on construction cost index.
City of West Hollywood Population: 36,000	1986	Non-Residential \$8.92	10,000 SF threshold Schools, public facilities, non-profits, public transportation.	Yes	Fees adjusted by CPI annually
City of Culver City Population: 39,000	Proposed	Non-Residential \$5.00	10,000 SF threshold	TBD	TBD
City of Glendale Population: 199,000	2019	Non-Residential \$4.00	1,250 SF threshold Hotels, auto dealers, institutional uses, exempt.	No	Not specified.
City of San Diego Population: 1,391,000	1990 Updated 2014	Office \$2.12 Hotel \$1.28 R&D \$0.80 Retail \$1.28	No minimum threshold Industrial/ warehouse, non-profit hospitals exempt.	Can dedicate land or air rights in lieu of fee	
CENTRAL COAST					
County of San Luis Obispo Population: 280,000	2009 updated 2017	Retail \$1.36 Office \$0.96 Hotel/Motel \$1.44 Industrial / Warehouse \$0.58 Commercial Greenhouses \$0.03 Other Non-Residential \$1.26	5,000 gsf threshold educational, religious, public, institutional, and residential care uses	Yes equivalent to what fees would produce	Fees indicated are 40% of full phase-in level and are indexed annually based on the construction cost increases.
City of San Luis Obispo Population: 47,000	2004	5% of building permit valuation	2,500 gsf threshold	Yes. 2 aff. units per acre.	
Note: This chart has been assembled to present an overview, and as a result, terms are simplified. The information is recent but not all data has been updated as of the date of this report. In some cases, fees are adjusted by an index (such as CPI) which may not be reflected. For use other than general comparison, please consult the code and staff of the jurisdiction.					

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Jurisdiction	Yr. Adopted/ Updated	Fee Level (per Sq.Ft. unless otherwise noted)	Thresholds & Exemptions	Build Option/ Other	Comments
SACRAMENTO AREA					
City of Sacramento Population: 490,000	1989 Most recent update, 2004	Office \$2.76 Hotel \$2.63 Commercial \$2.22 Manufacturing \$1.73 Warehouse/Office \$0.76	No minimum threshold State or federal property, mixed use w/50%+ residential, certain non-profits, temporary buildings.	Yes. Specifies No. of units per SF	Fee is adjusted annually based on construction cost index
City of Folsom Population: 76,000	2002	Office, Retail, Lt Industrial, and Manufacturing \$1.70 Up to 200,000 SF, 100% of fee; 200,000-250,000 SF, 75% of fee; 250,000-300,000 SF, 50% of fee; 300,000 and up, 25% of fee.	No minimum threshold Select nonprofits, small child care centers, churches, mini storage, parking garages, private garages, private schools exempt.	Yes Provide new or rehab housing affordable to very low income households. Also, land dedication.	Fee is adjusted annually based on construction cost index
County of Sacramento Population: 1,495,000	1990	Office \$0.97 Hotel \$0.92 R&D \$0.82 Commercial \$0.77 Manufacturing \$0.61 Warehouse \$0.26	No minimum threshold Service uses operated by non-profits are exempt	N/A	
City of Elk Grove Population: 166,000	1989 Most recent update, 2013	Commercial \$0.78 Hotel \$2.20 Manufacturing \$0.88 Warehouse \$0.94	No minimum threshold Federal/state agencies, public schools, churches, libraries, city, county projects.	N/A	Fee is adjusted annually based on ENR construction cost index
Citrus Heights Population: 87,000	1989 (inherited from County when incorporated)	Office \$0.97 Hotel \$0.92 R&D \$0.82 Commercial \$0.77 Manufacturing \$0.61 Warehouse \$0.26	No minimum threshold Membership organizations (churches, non-profits, etc.), mini storage, car storage, marinas, car washes, private parking garages and agricultural uses exempt	N/A	
Rancho Cordova Population: 71,000	1989 (inherited from County when incorporated)	Office \$0.97 Hotel \$0.92 R&D \$0.82 Commercial \$0.77 Manufacturing \$0.61 Warehouse \$0.26	No minimum threshold Membership organizations (churches, non-profits, etc.), mini storage, car storage, marinas, car washes, private parking garages and agricultural uses exempt	N/A	
Placer County Population: 398,000	2020	All Non-residential \$2.00 Sierra Nevada / Tahoe area only	No minimum threshold warehouse, commercial in mixed use over residential, governmental and institutional, childcare, churhes.	Yes	ENR Building Cost Index 20-City Average.
Note: This chart has been assembled to present an overview, and as a result, terms are simplified. The information is recent but not all data has been updated as of the date of this report. In some cases, fees are adjusted by an index (such as CPI) which may not be reflected. For use other than general comparison, please consult the code and staff of the jurisdiction.					

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Jurisdiction	Yr. Adopted/ Updated	Fee Level (per Sq.Ft. unless otherwise noted)	Thresholds & Exemptions	Build Option/ Other	Comments
SAN FRANCISCO, PENINSULA, SANTA CLARA COUNTY					
San Francisco Population: 864,000	1981 Updated 2002, 2007 2019	Retail / Entertainment \$28.13 Hotel \$22.57 Office (50,000 gsf and above) \$69.60 Office (<50,000 gsf) \$62.64 Laboratory \$38.37 Small Enterprise Workspace \$23.70	25,000 gsf threshold Exempt: freestanding pharmacy < 50,000 SF; grocery < 75,000	Yes, may contribute land for housing.	Office and Laboratory fees reflect fully phased in January 1, 2021 fee levels. Fee is adjusted annually based on the construction cost increases.
San Jose Population: 1,022,000	2020	Office \$0-15 Retail \$0 Hotel (applies to net sf) \$5 Warehouse \$5 Residential Care (applies to net SF) \$6 Industrial and Research and Dev. \$0-\$3	5,000 gsf threshold Shelter/supportive housing; agriculture; aquaculture; aquaponics, and hydroponics; stadiums, arenas, performing arts venues, and rehearsal space; cemetery; assembly uses; commercial vehicle storage; data center; day care; education and training; energy generation facility; mineral extraction; museums, libraries, parks,	Yes	Fee varies by geographic area, project size and depending on timing of payment.
County of Santa Clara	2018	Academic Space (Stanford Area) \$68.50	no threshold	Yes	Fee in effect July 1, 2020.
City of Palo Alto Population: 67,000	1984 Updated 2002 and 2017.	Office & R&D \$38.48 Other Commercial \$22.40	Churches; universities; recreation; hospitals; private educational facilities; day care and nursery school; public facilities; retail, restaurants, services < 1,500 sf are exempt	Yes	Fee is adjusted annually based on CPI.
City of Menlo Park Population: 34,000	1998	Office & R&D \$18.69 Other com./industrial \$10.14	10,000 gross SF threshold Churches, private clubs, lodges, fraternal orgs, public facilities and projects with few or no employees are exempt.	Yes, preferred. May provide housing on- or off-site.	Fee is adjusted annually based on CPI.
City of Sunnyvale Population: 152,000	1984 Updated 2003 and 2015.	Industrial, Office, R&D: \$16.50 Retail, Hotel \$8.25	Office fee is 50% on the first 25,000 SF of building area. Exemptions for Child care, education, hospital, non-profits, public uses.	N/A	Fee is adjusted annually based on CPI.
City of Santa Clara Population: 125,000	2017	Office 20,000 SF + \$20.00 Office, under 20,000 SF \$10.00 Industrial 20,000 SF + \$10.00 Industrial under 20,000 SF \$5.00 Retail, Hotel, Other 5,000 SF+ \$5.00 Low intensity uses \$2.00	Assembly, day care, nursery, schools and hospitals and commercial space in a mixed use project under 20,000 square feet are exempt.	Yes.	Fee is adjusted annually based on ENR.
City of San Mateo Population: 104,000	2016	Office \$26.10 Hotel \$10.44 Retail \$5.22	5,000 SF threshold 25% fee reduction for projections paying prevailing wage. Schools, religious, child care centers, public and non-profit uses exempt.		Fee is adjusted annually based on ENR.
City of Foster City Population: 34,000	2016	Office , Medical Office and R&D \$27.50 Hotel \$12.50 Retail, Restaurant and Services \$6.25	5,000 SF threshold Schools, places of public assembly, recreational facilities, hospitals, cultural institutions, childcare facilities, nursing homes, rest homes, residential care facilities, and skilled		
South San Francisco Population: 67,000	2018	Office , Medical Office and R&D \$15.00 Hotel \$5.00 Retail, Restaurant and Services \$2.50	25% fee reduction for projections paying prevailing wage. Schools, churches, child care centers, public uses exempt.		

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Jurisdiction	Yr. Adopted/ Updated	Fee Level (per Sq.Ft. unless otherwise noted)	Thresholds & Exemptions	Build Option/ Other	Comments
East Palo Alto Population: 30,000	2016	non-residential \$10.72	10,000 SF threshold		
San Bruno Population: 43,000	2015	Office and R&D \$13.10 Hotel \$13.10 Retail, Restaurant, Services \$6.55	No minimum threshold	Yes. Program specifies number of units per 100,000 SF.	Fee is adjusted annually based on ENR.
Redwood City Population: 84,000	2015	Office (Medical, R&D, Admin) \$20.00 Hotel \$5.00 Retail & Restaurant \$5.00	5,000 SF threshold 25% fee reduction for projections paying prevailing wage. Schools, child care centers, public uses exempt.	Yes. Program specifies number of units per 100,000 SF.	Fee is adjusted annually based on ENR.
City of Mountain View Population: 80,000	Updated 2002 / 2012 /2014 /2016	Office/High Tech/Indust. \$28.25 Hotel/Retail/Entertainment. \$3.02	Fee is 50% on building area under thresholds: Office <10,000 SF Hotel <25,000 SF Retail <25,000 SF	Yes	Fee is adjusted annually based on CPI.
City of Cupertino Population: 61,000	1993, 2015	Office/Industrial/R&D \$24.60 Hotel/Commercial/Retail \$12.30	No minimum threshold.	N/A	Fee is adjusted annually based on CPI.
City of Los Altos Population: 31,000	2018	Office (recommended fee level) \$25.00 All Other Non-Residential (rec. fee) \$15.00	500 SF threshold	Yes	Fee is adjusted annually based on CPI.
City of Milpitas Population: 75,000	2019	Office/ Retail \$8.00 Industrial \$4.00	5,000 SF threshold Assembly, day care, schools, hospitals exempt.	N/A	Fee is adjusted annually based on ENR.
County of San Mateo Population: 763,000	2016	Office/Medical/R&D \$25.00 Hotel \$10.00 Retail / Restaurant /Services \$5.00	3,500 SF threshold; 25% fee reduction for prevailing wage. public, institutional, childcare, recreational, assisted living exempt.	Yes. Program specifies number of units.	Fee is adjusted annually based on ENR.
Note: This chart has been assembled to present an overview, and as a result, terms are simplified. The information is recent but not all data has been updated as of the date of this report. In some cases, fees are adjusted by an index (such as CPI) which may not be reflected. For use other than general comparison, please consult the code and staff of the jurisdiction.					

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EAST BAY					
City of Walnut Creek Population: 69,000	2005	Office, retail, hotel and medical \$5.00	First 1,000 SF no fee applied.	Yes	Reviewed every five years.
City of Oakland Population: 417,000	2002	Office/ Warehouse \$5.89	25,000 SF exemption	Yes - Can build units equal to total eligible SF times .00004	Fee due in 3 installments. Fee adjusted with an annual escalator tied to residential construction cost increases.
City of Berkeley Population: 120,000	1993 2014	Office \$4.50 Retail/Restaurant \$4.50 Industrial/Manufacturing \$2.25 Hotel/Lodging \$4.50 Warehouse/Storage \$2.25 Self-Storage \$4.37 R&D \$4.50	7,500 SF threshold.	Yes	Annual CPI increase. May negotiate fee downward based on hardship or reduced impact.
Richmond Population: 111,000	2020	Non-residential \$2.00	5,000 SF threshold	No	Fee indexed annually by ENR Construction Cost Index
City of Fremont Population: 231,000	2017	Office, R&D, Hotel, Retail \$8.00 Industrial, Mfg, Warehouse \$4.00	Public uses, additions less than 1,000 SF, manufacturing over 100,000 SF / building exempt.	Yes by formula	Fees are as of 2020 full phase in.
City of Emeryville	2014	All Commercial \$4.43	Schools, daycare centers, storage.	Yes	Fee adjusted annually.
City of Alameda Population: 78,000	1989	Retail \$2.54 Office \$4.99 Warehouse \$0.87 Manufacturing \$0.87 Hotel/Motel \$1,223	No minimum threshold	Yes. Program specifies # of units per 100,000 SF	Fee may be adjusted by CPI.
City of Pleasanton Population: 79,000	1990, 2018	Retail \$4.56 Hotel/Motel \$4.56 Office \$7.61 Indust. / R&D / Manuf / Warehouse 12.64	No minimum threshold Churches exempt.	Yes	Fee adjusted annually.
City of Dublin Population: 57,000	2005	Industrial \$0.56 Office \$1.45 R&D \$0.95 Retail \$1.18 Services & Accommodation \$0.49	20,000 SF threshold	N/A	
City of Newark Population: 46,000		Commercial \$3.80 Industrial \$0.72	No min threshold Schools, recreational facilities, religious institutions exempt.	Yes	Revised annually
City of Livermore Population: 88,000	1999	Retail \$1.38 Service Retail \$1.04 Office \$0.89 Hotel \$679/ rm Manufacturing \$0.43 Warehouse \$0.12 Business / Commercial \$0.88 High Intensity Industrial \$0.44 Low Intensity Industrial \$0.28	No minimum threshold Church, private or public schools exempt.	Yes; negotiated on a case-by-case basis.	

Note: This chart has been assembled to present an overview, and as a result, terms are simplified. The information is recent but not all data has been updated as of the date of this report. In some cases, fees are adjusted by an index (such as CPI) which may not be reflected. For use other than general comparison, please consult the code and staff of the jurisdiction.

APPENDIX B
SUMMARY OF NON-RESIDENTIAL AFFORDABLE HOUSING FEE PROGRAMS

Jurisdiction	Yr. Adopted/ Updated	Fee Level (per Sq.Ft. unless otherwise noted)	Thresholds & Exemptions	Build Option/ Other	Comments
MARIN, NAPA, SONOMA, SANTA CRUZ					
County of Santa Cruz Population: 273,000	2015	All Other Non-Residential \$3.00 Agricultural, Barn Housing Animals \$1.00	No minimum threshold. Governmental and institutional uses exempt	N/A	
County of Marin Population: 261,000	2003, 2016	Office/R&D \$7.19 Retail/Rest. \$5.40 Warehouse \$1.94 Residential Care Facility \$19.32 Medical-Extended Care \$22.54 Hotel/Motel \$1,745/rm Manufacturing \$3.74	No minimum threshold	Yes, preferred.	
San Rafael Population: 59,000	2005	Office/R&D \$10.32 Retail/Rest./Pers. Services \$7.74 Manufacturing/LI \$5.59 Warehouse \$3.01 Hotel/Motel \$2.58	5,000 SF threshold. Mixed use projects that provide affordable housing are exempt.	Yes. Program specifies number of units per 1,000 SF.	
Town of Corte Madera Population: 10,000	2001	Office \$4.79 R&D lab \$3.20 Light Industrial \$2.79 Warehouse \$0.40 Retail \$8.38 Com Services \$1.20 Restaurant \$4.39 Hotel \$1.20 Health Club/Rec \$2.00 Training facility/School \$2.39	No minimum threshold	N/A	
City of St. Helena Population: 6,000	2004	Office \$4.11 Comm./Retail \$5.21 Hotel \$3.80 Winery/Industrial \$1.26	Small childcare facilities, churches, non-profits, vineyards, and public facilities are exempt.	Yes, subject to City Council approval.	
City of Petaluma Population: 60,000	2003	Commercial \$2.89 Industrial \$2.98 Retail \$5.00	N/A	Yes, subject to City Council approval.	Fee adjusted annually by ENR construction cost index.
County of Sonoma Population: 501,000	2005	Office \$2.92 Hotel \$2.92 Retail \$5.05 Industrial / Warehouse \$3.01 R&D Ag Processing \$3.01	First 2,000 SF exempt Non-profits, redevelopment areas exempt	Yes. Program specifies number of units per 1,000 SF.	Fee adjusted annually by ENR construction cost index.

APPENDIX B
SUMMARY OF NON-RESIDENTIAL AFFORDABLE HOUSING FEE PROGRAMS

Jurisdiction	Yr. Adopted/ Updated	Fee Level (per Sq.Ft. unless otherwise noted)	Thresholds & Exemptions	Build Option/ Other	Comments
City of Cotati Population: 7,000	2006	Commercial \$2.11 Industrial \$2.18 Retail \$3.64	First 2,000 SF exempt Non-profits exempt.	Yes. Specifies No. of units per 1,000 SF	Fee adjusted annually by ENR construction cost index.
County of Napa Population: 141,000	Updated 2014	Office \$5.25 Hotel \$9.00 Retail \$7.50 Industrial \$4.50 Warehouse \$3.60	No minimum threshold Non-profits are exempt	Units or land dedication; on a case by case basis.	
City of Napa Population: 80,000	1999 Updated 2016	Office \$3.55 Hotel \$6.00 Retail \$3.55 Industrial \$3.50	No minimum threshold Non-profits are exempt	Units or land dedication; on a case by case basis.	Fee has not changed since 1999. Increases under consideration.

Note: This chart has been assembled to present an overview, and as a result, terms are simplified. The information is recent but not all data has been updated as of the date of this report. In some cases, fees are adjusted by an index (such as CPI) which may not be reflected. For use other than general comparison, please consult the code and staff of the jurisdiction.

OTHER WEST COAST CITIES

Seattle, WA Population: 638,000	Citywide Expansion Adopted 2015	Fees vary by geographic area / zone: Downtown and S. Lake Union \$0 - \$17.50 (fees vary by specific zoning district) Outside Downtown: Low Fee Areas \$5 Medium Fee Areas \$7 High Fee Areas \$8 IC 85-160 zone \$10	4,000 SF threshold; Exemptions include (1) a number of specific zoning districts; (2) for structures with at least 50 percent residential use: up to 4,000 SF street-level retail, restaurant, arts, entertainment; (3) commercial uses within affordable projects.	Yes	Fee is indexed based on CPI.
Portland, OR Population: 653,000	2016	Affordable Housing Construction Excise Tax at 1% of building permit value	Improvements <\$100,000, private schools, hospitals, religious, agriculture, certain non-profit care facilities, public improvements.		

Note: This chart has been assembled to present an overview, and as a result, terms are simplified. The information is recent but not all data has been updated as of the date of this report. In some cases, fees are adjusted by an index (such as CPI) which may not be reflected. For use other than general comparison, please consult the code and staff of the jurisdiction.

Appendix C – Non-Residential Affordable Housing Nexus Analysis



KEYSER MARSTON ASSOCIATES

APPENDIX C

DRAFT

NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS

Prepared for
City of Goleta

Prepared by:
Keyser Marston Associates, Inc.

August 2021

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1.0 EXECUTIVE SUMMARY

This Non-Residential Affordable Housing Nexus Analysis (“Nexus Analysis”) has been prepared by Keyser Marston Associates, Inc. (“KMA”) for the City of Goleta (“City”) to provide nexus support for the City’s non-residential affordable housing requirements. The City’s Housing Element Policy 2.2b, *Mitigation of Employee Housing Impacts*, requires new, non-residential development and proposed expansion or intensification of existing, non-residential development to contribute to the provision of affordable employee housing. Projects subject to the policy have generally complied by making an in-lieu financial contribution for affordable housing determined on a project-by-project basis. This report provides a nexus analysis to support establishment of non-residential affordable housing impact fees in the City, also referred to as “commercial linkage fees.” Establishment of a fee is an implementation measure for the City’s Housing Element that would replace the current project-by-project application and help to mitigate the impacts of new development on the need for affordable housing.

This Nexus Analysis has been prepared for the limited purpose of determining nexus support for non-residential affordable housing fees in the City. The Nexus Analysis quantifies the linkages between new non-residential buildings, the employees who work in them, and their demand for affordable housing, and calculates maximum supported fee levels based on the cost of mitigating the increased demand for affordable housing consistent with the requirements of the Mitigation Fee Act (Government Code Section 66000 et seq.). Findings are not recommended fee levels. Fees may be set anywhere up to the maximums identified in this study.

The report entitled “Non-Residential Affordable Housing Fee Report,” to which this Nexus Analysis is appended, provides a range of analyses to inform consideration of potential fee levels.

Maximum Fee Conclusions of the Nexus Analysis

The maximum fee conclusions of the Nexus Analysis are summarized in Table 1-1. Findings reflect the cost of mitigating affordable housing impacts of new development as documented in the Nexus Analysis. Figures in Table 1-1 represent technical impact analysis findings only and are not recommended fee levels. The City is free to set fees anywhere below the maximums identified in Table 1-1.

Table 1-1. Nexus Analysis Maximum Fee Level Findings	
Use	Maximum Fee Per Sq. Ft. of Gross Building Area ⁽¹⁾
Office	\$97.80
Medical	\$85.20
Retail / Commercial	\$112.90
Hotel	\$45.40
Industrial	\$80.10
Research and Development	\$45.00
Warehouse	\$25.90
Residential Care	\$25.70

⁽¹⁾ Maximum fee level findings are per square foot of gross building area excluding parking.

The results of the Nexus Analysis are heavily driven by two factors: the density of employees within buildings and the occupational make-up of the workforce. Retail has both high employment density and a high proportion of lower paying jobs, factors that in combination result in the highest affordable housing impacts and maximum fee level conclusions among the eight land use types¹. Warehouse and residential care facilities have a high proportion of lower paying jobs, but a low density of employment, resulting in lower maximum fee level conclusions compared to other land uses.

¹ The terms land use type and building type are used interchangeably in this Nexus Analysis.

2.0 INTRODUCTION

This Nexus Analysis has been prepared by KMA to provide nexus support for potential new affordable housing impact fees that would apply to non-residential development in the City and implement a policy established in the City's Housing Element with respect to the mitigation of employee housing impacts. The Nexus Analysis analyzes the linkages between non-residential development in the City and the need for additional affordable housing and calculates maximum housing fee levels consistent with the Mitigation Fee Act (Government Code Section 66000 et. seq.), which requires a reasonable relationship be established between the fee and impacts of new development addressed by the fee.

The purpose of the Nexus Analysis is to document and quantify the impacts of development of new non-residential buildings and the employees that work in them, on the demand for affordable housing. Because jobs in all buildings cover a range of compensation levels, there are housing needs at all affordability levels. This analysis quantifies the need for affordable housing created by eight categories of new workplace buildings and determines maximum supported fees based on the cost of mitigating the increased affordable housing demand.

2.1 Use Categories Addressed

This analysis addresses the following eight types of workplace buildings potentially subject to a new non-residential affordable housing impact fee program in the City:

- **Office** encompasses the full range of office tenant types from professional service and administrative offices to technology sector tenants and medical and dental offices.
- **Medical** includes hospitals and outpatient medical facilities, but not medical office buildings, which are included in the office space category.
- **Retail/Commercial** includes retail, restaurants, dry cleaners, health clubs and other personal care and service uses that commonly occupy retail space.
- **Hotel** covers the range from full-service hotels to limited service accommodations.
- **Industrial** covers a broad range of uses occupying industrial buildings as well as auto repair and service, and other uses of a semi-industrial character.
- **Research and Development (R&D)** covers facilities for scientific or medial research, product design, prototype production, development and testing.
- **Warehouse** covers structures primarily devoted to storage or logistics activities and typically with a small amount of office space.
- **Residential Care** encompasses assisted living, nursing homes, memory care, residential treatment centers, congregate care, and other facilities that provide primarily non-medical care for persons in need of personal services, supervision, protection, or assistance for sustaining the activities of daily living.

2.2 Affordability Levels Addressed

The Nexus Analysis addresses the following four income or affordability tiers:

- Extremely Low: households earning up to 30% Area Median Income (AMI);
- Very Low: households earning over 30% AMI up to 50% AMI;
- Low: households earning over 50% AMI up to 80% of AMI; and,
- Moderate: households earning over 80% AMI up to 120% of AMI.

Households are categorized by income tier based on income limits published by the California Department of Housing and Community Development (HCD). For reference, the 2021 median income for a family of four in Santa Barbara County is \$90,100. Table 2-1 identifies income limits for all applicable income categories and household sizes.

Table 2-1. Household Income Limits for Santa Barbara County, 2021						
	Household Size (Persons)					
	1	2	3	4	5	6
Extremely Low (0%-30% AMI)	\$26,250	\$30,000	\$33,750	\$37,450	\$40,450	\$43,450
Very Low (30%-50% AMI)	\$43,750	\$50,000	\$56,250	\$62,450	\$67,450	\$72,450
Low (50%-80% AMI)	\$70,050	\$80,050	\$90,050	\$100,050	\$108,100	\$116,100
Moderate (80%-120% AMI)	\$75,650	\$86,500	\$97,300	\$108,100	\$116,750	\$125,400
Median (100% of Median)	\$63,050	\$72,100	\$81,100	\$90,100	\$97,300	\$104,500

Source: California Department of Housing and Community Development, 2021 Income Limits.

Although the City's inclusionary program also addresses affordable housing needs of Above Moderate income households with incomes over 120% of AMI up to 200% of AMI, this income tier is not included for purposes of the Nexus Analysis. The reason is that existing units affordable to households within the Above Moderate income category were found to be available in Goleta. As housing options are available to households in the Above Moderate income category at market rate, the Nexus Analysis assumes that this income group can meet its housing needs through the private housing market without City assistance. Notwithstanding the ability of Above Moderate households to afford a portion of *existing* available units, new units are generally out of reach for a broad spectrum of Above Moderate households. Continuing to include the Above Moderate category as part of the City's inclusionary program helps to expand housing opportunities for this income group and promote mixed income and inclusive communities in Goleta for a broad spectrum of households. While the Above Moderate category is not included for purposes of the Nexus Analysis, the City is not precluded from continuing to address the Above Moderate category as part of the City's inclusionary housing policies.

2.3 Overview of Methodology

The Nexus Analysis links new non-residential buildings with new workers; these workers demand additional housing, a portion of which needs to be affordable to the workers in lower and moderate-income households. Following is an overview of the analysis steps used in determining the maximum housing fee levels:

- **Employment** – The number of employees is estimated for each land use type using employment density ratios, as described in Section 3.1.
- **Housing Units Required** – The number of housing units needed to house the new workforce is estimated based on the average number of workers per working household.
- **Worker Household Incomes** – Household incomes of workers are estimated by combining data on worker occupations from the Bureau of Labor Statistics, local wage data from the California Employment Development Department (EDD) and local U.S. Census data relating individual worker income to total household income.
- **Affordable Housing Need** – Worker household incomes are compared to income criteria from HCD to determine the number of housing units needed by affordability level.
- **Mitigation Cost and Maximum Fees** – The cost of mitigating affordable housing impacts of new development is calculated based on the net subsidy required to deliver the needed affordable housing. Mitigation costs are expressed per square foot of building area for each non-residential land use type, which establishes an upper limit on housing fees proportionate to the impacts.

2.4 Report Organization

The report is organized into five sections and two appendices, as follows:

- Section 1.0 is the Executive Summary.
- Section 2.0 provides an Introduction.
- Section 3.0 presents the Nexus Analysis for the eight non-residential use types under study, concluding with the maximum supported affordable housing fee level per square foot of building area.
- Section 4.0 contains the affordability gap analysis representing the net cost of delivering each unit of housing affordable to households at the income levels under study.

- Section 5.0 provides draft findings language consistent with the Mitigation Fee Act.
- Appendix A provides a discussion of various specific factors and assumptions in relation to the nexus concept.
- Appendix B provides supporting information on worker occupations and incomes.

Data Sources

This report has been prepared using the best and most recent data available at the time of the analysis. Local data and sources were used wherever possible. Major sources include the U.S. Census Bureau: 2015-2019 American Community Survey, California Employment Development Department and the Bureau of Labor Statistics. While we believe all sources utilized are sufficiently sound and accurate for the purposes of this analysis, we cannot guarantee their accuracy. KMA assumes no liability for information from these and other sources.

3.0 NEXUS ANALYSIS

This section presents a summary of the analysis linking the development of new non-residential buildings to the estimated number of lower income housing units required in each of four income categories. Then, the cost of providing affordable housing to the employee households is determined and expressed per square foot of building area. Findings represent the full mitigation cost for the affordable housing impacts of new development and the ceiling for any affordable housing fee that may be imposed.

3.1 Step-by-Step Narrative of Nexus Methodology

The Nexus Analysis is conducted using a methodology KMA developed for application in many jurisdictions for which the firm has conducted similar nexus analyses in support of affordable housing impact fee programs. Analysis inputs are all local data to the extent possible and are fully documented.

The analysis uses an assumed 100,000-square foot building size. Selection of this building size enables the number of jobs and housing units to be presented in whole numbers that can be more readily understood. At the conclusion of the analysis, findings are divided by the building size to express the linkages on a per square foot basis so that findings can be applied to buildings of any size.

Following is a description of each step of the analysis:

Step 1 – Estimated Number of Employees

The number of employees who will work in the new non-residential building types being analyzed is estimated using employment density factors drawn from a variety of sources. Sources include documents prepared pursuant to the California Environmental Quality Act (CEQA) for local development projects, Institute of Transportation Engineers (ITE) and other sources as noted in the discussion below. Employment estimates are summarized in Table 3-1 and are followed by a narrative discussion.

Table 3-1. Employment Estimate for Prototypical 100,000-Square Foot Buildings		
Use	Employment Density (Gross Square Feet Per Employee)	Number of Employees per 100,000 square feet of building area (=100,000 / Employment Density)
Office	300	333
Medical	350	286
Retail / Commercial	500	200
Hotel	1,200	83
Industrial	500	200
Research and Development	500	200
Warehouse	2,000	50
Residential Care	2,000	50

- *Office* – 300 square feet per employee. The estimate is based on several sources, including the City’s parking requirement for new office space, CEQA documents addressing office developments in Goleta, and the ITE Trip Generation Manual.
- *Medical* – 350 square feet per employee. This estimate is based on review of figures reported for the Goleta Valley Cottage Hospital in City staff reports and is consistent with employment densities reflected in CEQA documents for medical facilities in other California jurisdictions.
- *Retail / Commercial* – 500 square feet per employee. The employment density estimate for retail reflects consideration of a range of sources including the ITE Trip Generation Manual, restaurant employment densities derived from National Association of Restaurants data, and the City’s parking requirements for retail uses. The density range within this category is wide, with some types of retail such as restaurant space as much as five times as dense as other types such as furniture or building material supply stores. The estimate used is at the low end of the range of sources considered and will tend to understate the number of employees relative to many types of retail.
- *Hotel* – 1,200 square feet per employee. Hotels have a range of employment levels with higher service hotels with conference facilities being more employment intensive and minimal service extended stay hotels representing the lower end of the employment density range. The estimate of 1,200 square feet per employee is approximately equivalent to 0.5 employees per room and an average of 600 square feet of building area per room. This estimate is based on the average employees per hotel room in Santa Barbara County based the 5,729 hotel industry employees reported in the Quarterly Census of Employment and Wages as of the first quarter of 2020 and the aggregate number of hotel rooms reported by Smith Travel Research of 10,414 rooms as of 2020, which results in a ratio of 0.55 employees per room. This figure is rounded down to 0.5 employees per room for purposes of the Nexus Analysis.

- *Industrial* – 500 square feet per employee. This density covers flex space, light industrial and manufacturing activities. The 500 square feet per employee average is based on estimates from the ITE Trip Generation Manual.
- *Research and Development (R&D)* – 500 square feet per employee estimated consistent with the City’s parking requirement for this use.
- *Warehouse* – 2,000 square feet per employee. This reflects that the primary activity in the building is assumed to be storage or logistics. A small amount of office or administrative space is assumed within warehouse structures. Sources consulted include ITE, a Portland Metro Employment Density Study, U.S. Department of Energy. The estimate is conservative in that it reflects fewer employees than provided for by the City’s parking requirement of one space per 1,000 square feet of floor area.
- *Residential Care* – 2,000 square feet per employee. The employment density estimate is based on review of estimates for two residential care facilities including Mariposa at Ellwood Shores Assisted Living Facility and Gran Vida in Carpinteria, in addition to facilities elsewhere in California.

This Nexus Analysis was prepared during the coronavirus pandemic, which could have implications regarding the density of employment in workplace buildings. Potential effects can be separated into short-term, during the pandemic, and longer-term, post-pandemic. As the Nexus Analysis determines mitigation costs over the life of new buildings, long-term effects are pertinent while short-term or temporary changes in response to the pandemic would not warrant an adjustment.

The experience adapting to remote working during the coronavirus pandemic has led some businesses to plan for remote work as a larger part of their operations post-pandemic. A trend toward remote work would be expected to reduce demand for new commercial buildings overall but does not necessarily reduce the impacts of commercial buildings that are built. A second potential long-term adjustment resulting from the pandemic is reduced employment density, as employers make modifications to office layouts that increase the distance and physical separation between employees. This potential effect is likely most relevant for office building users that had transitioned to higher employment density office configurations. Office employment density estimates used in the analysis are more representative of traditional office layouts that have a mix of private offices and cubicles than higher employment density layouts like “benching” where employees work side-by-side with no partitions or cubicles separating them. As high employment density office configurations are not assumed, a downward adjustment in consideration of a possible reversal of trends toward higher density of employment within offices is not warranted.

Step 2 – Net New Employment After Adjustment for Changing Industries

This step makes an adjustment to employment estimates to take into account any declines, changes and shifts within all sectors of the economy and to recognize that new space is not always 100% equivalent to net new employees.

Similar to the U.S. as a whole, the local economy is constantly evolving, with job losses in some sectors and job growth in others. Over the past ten years, employment in some retail categories as well as governmental employment at both the local and federal levels have declined. Jobs lost in these declining sectors were replaced by job growth in other industry sectors.

The analysis makes an adjustment to take these declines, changes and shifts within all sectors of the economy into account, recognizing that jobs added are not 100% net new in all cases. A 6% adjustment is utilized based on the long-term shifts in employment that have occurred in some sectors of the local economy over the last decade and the likelihood of continuing changes in the future. Long-term declines in employment experienced in some sectors of the economy mean that some of the new jobs are being filled by workers that have been displaced from another industry and who are presumed to already have housing locally. The analysis assumes that existing workers downsized from declining industries are available to fill a portion of jobs in new workplace buildings.

The 6% downward adjustment used for purposes of the analysis was derived from California Employment Development Department data on employment by industry in Santa Barbara County over the ten-year period from March 2010 to March 2020. Over this period, approximately 1,600 jobs were lost in declining industry sectors while growing and stable industries added 25,000 jobs over the same period. The figures are used to establish a ratio between jobs lost in declining industries to jobs gained in growing and stable industries at 6%². In effect, this adjustment assumes 6% of new jobs are filled by a worker downsized from a declining industry and who already lives locally. As the objective is to identify longer-term declines, the declines in employment that occurred after March 2020 due to the coronavirus pandemic were not used as the basis for this adjustment as many of the jobs lost have been or are expected to be restored as the economy recovers from damage caused by the pandemic.

The discount for changing industries represents a conservative assumption because many displaced workers may exit the workforce entirely by retiring. Development of new workspace buildings will typically occur only to the extent there is positive net demand after re-occupancy of buildings vacated by businesses in declining sectors of the economy. To the extent existing buildings are re-occupied, the discount for changing industries is unnecessary because new buildings would represent net new growth in employment. The 6% adjustment is conservative in that it is mainly necessary to cover a special case in which buildings vacated by declining

² The 6% ratio is calculated as 1,600 jobs lost in declining sectors divided by 25,000 jobs gained in growing and stable sectors.

industries cannot be readily occupied by other users due to their special purpose nature, because of obsolescence, or because they are torn down or converted to residential.

Step two is illustrated in Table 3-2.

Table 3-2. Net New Jobs		
Use	Number of Employees per 100,000 square feet (Table 3-1)	Net New Employees after 6% Declining Industries Adjustment per 100,000 square feet
Office	333	313
Medical	286	269
Retail / Commercial	200	188
Hotel	83	78
Industrial	200	188
Research and Development	200	188
Warehouse	50	47
Residential Care	50	47

Step 3 – Adjustment from Employees to Employee Households

This step converts the number of employees to the number of employee households, recognizing that there is, on average, more than one worker per household, and thus the number of housing units needed for new workers is less than the number of new workers. The workers-per-worker-household ratio eliminates from the equation all non-working households, such as retired persons and students.

According to the 2015-2019 American Community Survey, the number of workers per worker household for Santa Barbara County is 1.93, including full- and part-time workers.³ The total number of jobs created is divided by the 1.93 workers-per-worker-household factor to determine the number of housing units that are needed to house the new workforce. Step three is illustrated in Table 3-3.

³ Source data does not allow a breakout between full and part-time workers; however, for purposes of compensation levels, full-time work is assumed for all workers as described in Step 5.

Table 3-3. Number of Housing Units Needed		
Use	Net New Jobs per 100,000 square feet (Table 3-2)	Number of Worker Households / Housing Units Needed per 100,000 square feet (= net new jobs / 1.93 workers per worker household)
Office	313	162.2
Medical	269	139.1
Retail / Commercial	188	97.3
Hotel	78	40.6
Industrial	188	97.3
Research and Development	188	97.3
Warehouse	47	24.3
Residential Care	47	24.3

Step 4 – Occupational Distribution of Employees

Estimating the occupational breakdown of employees is the first step to arrive at income levels. The occupational make up of jobs by land use type is estimated by combining two data sources: Bureau of Labor Statistics data on the distribution of occupations by industry category and data on employment by industry for Santa Barbara County from the Quarterly Census of Employment and Wages (QCEW). Industry categories are weighted to reflect the mix of employers in Santa Barbara County. An overview that relates industry categories to use categories is provided in Table 3-4, while Appendix B Table 17 provides the complete list.

Table 3-4. Overview of Industries Represented by Use Category	
Use	Overview of Industries Categories Represented
Office	Financial, professional service, and other industries that occupy office buildings
Medical	Outpatient care centers, diagnostic labs, hospitals, and skilled nursing facilities
Retail / Commercial	Retail, restaurants, and personal service industries
Hotel	Traveler accommodation industry
Industrial	Wholesale, manufacturing, automotive, maintenance, repair services
Research and Development	Research and development in the physical, engineering and life sciences
Warehouse	Warehouse and storage industry
Residential Care	Continuing care retirement communities and assisted living facilities industry

Note: See Appendix B Table 17 for additional information.

This step results in a distribution of workers by occupation category for the eight use categories. Table 3-5 indicates the percentage distribution by occupation.

Table 3-5. Percent of Jobs by Occupation

	Office	Medical	Retail / Comm'l	Hotel	Industrial	R&D	Warehouse	Residential Care
Management Occupations	10.0%	3.9%	2.6%	4.5%	6.9%	15.4%	2.7%	3.5%
Business and Financial	12.6%	2.2%	0.7%	1.6%	5.5%	10.1%	2.2%	1.0%
Computer & Mathematical	12.3%	1.3%	0.1%	0.1%	4.8%	12.7%	0.6%	0.1%
Architecture & Engineering	6.3%	0.0%	0.0%	0.0%	9.0%	16.0%	0.2%	0.0%
Sciences	1.9%	0.8%	0.0%	0.0%	0.6%	25.9%	0.1%	0.0%
Community & Social Svs	0.9%	3.8%	0.0%	0.0%	0.0%	0.2%	0.0%	0.8%
Legal	2.1%	0.0%	0.0%	0.0%	0.1%	0.6%	0.0%	0.0%
Education, and Library	0.6%	0.3%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%
Arts, Design, Entertainment	2.3%	0.2%	0.4%	0.2%	0.9%	1.1%	0.2%	0.1%
Healthcare Practitioners	9.0%	49.2%	1.5%	0.0%	0.1%	2.5%	0.0%	10.8%
Healthcare Support	5.0%	16.7%	0.3%	0.6%	0.0%	0.9%	0.0%	44.9%
Protective Service	0.5%	0.6%	0.3%	1.5%	0.1%	0.4%	0.8%	0.6%
Food Prep and Serving	0.7%	2.9%	45.8%	25.0%	2.0%	0.0%	0.1%	18.0%
Building and Grounds.	1.1%	3.0%	0.5%	30.7%	0.4%	0.4%	0.7%	6.0%
Personal Care and Service	1.3%	0.7%	2.6%	4.1%	0.0%	0.2%	0.0%	4.4%
Sales and Related	6.2%	0.3%	27.1%	2.5%	8.0%	1.5%	1.2%	0.5%
Office and Admin Support	22.3%	11.9%	4.5%	19.7%	9.8%	7.7%	13.1%	5.1%
Farming, Fishing, Forestry	0.0%	0.0%	0.1%	0.0%	5.0%	0.2%	0.1%	0.0%
Construction and Extraction	0.6%	0.1%	0.2%	0.2%	0.6%	0.3%	0.1%	0.1%
Installation, Maint., Repair	2.5%	0.9%	2.2%	5.6%	9.2%	1.2%	2.8%	2.5%
Production	0.9%	0.4%	2.3%	2.5%	27.9%	2.0%	2.3%	0.5%
Transportation	<u>0.8%</u>	<u>0.7%</u>	<u>8.8%</u>	<u>1.2%</u>	<u>9.0%</u>	<u>0.6%</u>	<u>72.7%</u>	<u>1.1%</u>
Totals	100%	100%	100%	100%	100%	100%	100%	100%

To determine the distribution of worker households by occupation category, the percentage distribution of worker occupations identified in Table 3-5 is multiplied by the total number of worker households from Table 3-3. The result is a distribution in the number of worker households by worker occupation category as shown in Table 3-6. As one example, the 162 estimated worker households with office (Table 3-3) is multiplied by the 10% share in management occupations (Table 3-5) to arrive at the 16 worker households in management occupations in Table 3-6.

Table 3-6. Number of Worker Households by Worker Occupation Category

	Office	Medical	Retail / Comm'l	Hotel	Industrial	R&D	Warehouse	Residential Care
Management Occupations	16.3	5.4	2.5	1.8	6.8	14.9	0.7	0.8
Business and Financial	20.4	3.0	0.6	0.6	5.4	9.8	0.5	0.2
Computer & Mathematical	20.0	1.8	0.1	0.0	4.7	12.4	0.2	0.0
Architecture & Engineering	10.2	0.1	0.0	0.0	8.7	15.5	0.1	0.0
Sciences	3.1	1.2	0.0	0.0	0.6	25.2	0.0	0.0
Community & Social Svs	1.5	5.3	0.0	0.0	0.0	0.2	0.0	0.2
Legal	3.4	0.0	0.0	0.0	0.1	0.5	0.0	0.0
Education, and Library	0.9	0.4	0.0	0.0	0.0	0.3	0.0	0.0
Arts, Design, Entertainment	3.7	0.3	0.4	0.1	0.9	1.1	0.0	0.0
Healthcare Practitioners	14.6	68.5	1.5	0.0	0.1	2.4	0.0	2.6
Healthcare Support	8.1	23.2	0.3	0.2	0.0	0.9	0.0	10.9
Protective Service	0.8	0.8	0.3	0.6	0.1	0.4	0.2	0.1
Food Prep and Serving	1.2	4.0	44.6	10.1	1.9	0.0	0.0	4.4
Building and Grounds.	1.7	4.2	0.4	12.4	0.4	0.4	0.2	1.5
Personal Care and Service	2.0	1.0	2.6	1.7	0.0	0.2	0.0	1.1
Sales and Related	10.1	0.4	26.4	1.0	7.7	1.4	0.3	0.1
Office and Admin Support	36.1	16.5	4.4	8.0	9.5	7.5	3.2	1.3
Farming, Fishing, Forestry	0.0	0.0	0.1	0.0	4.9	0.2	0.0	0.0
Construction and Extraction	1.1	0.2	0.2	0.1	0.6	0.3	0.0	0.0
Installation, Maint., Repair	4.1	1.3	2.1	2.3	9.0	1.2	0.7	0.6
Production	1.4	0.6	2.3	1.0	27.2	1.9	0.6	0.1
Transportation	<u>1.4</u>	<u>1.0</u>	<u>8.6</u>	<u>0.5</u>	<u>8.8</u>	<u>0.5</u>	<u>17.7</u>	<u>0.3</u>
Totals	162.2	139.1	97.3	40.6	97.3	97.3	24.3	24.3

Step 5 – Estimate of Employee Household Incomes

Employee wage and salary distribution is based on the occupational distribution from Step 4 in combination with recent Santa Barbara County wage and salary information from the California Employment Development Department (EDD) for the first quarter of 2020.

For each occupational category shown in Tables 3-5 and 3-6, the Occupational Employment Survey (OES) data provide a distribution of specific occupations within the category. For example, within the Food Preparation and Serving Category, there are Supervisors, Cooks, Servers, Dishwashers, etc. Each of these individual categories has a different distribution of wages which was obtained from EDD and is specific to workers in Santa Barbara County as of 2020. Worker compensations used in the analysis assume full time employment (40 hours per week) based on EDD's convention for reporting annual compensation. Compensations are adjusted where applicable to reflect the current \$14 per hour State minimum wage for businesses with 26 or more employees, which results in a minimum annual income of \$29,120, assuming full time employment. The detailed occupation and salary data is provided in Appendix B.

Employee income is then translated into an estimate of household income using ratios between individual employee income and household income derived from U.S. Census data shown in Table 3-7. Ratios reflect an analysis of data for the workforce in Santa Barbara County with annual household incomes under \$500,000. Households with income of \$500,000 or more are not included to avoid a disproportionate influence on averages by a small percentage of households with incomes well over levels addressed in the Nexus Analysis.

Table 3-7. Ratio of Household Income to Individual Worker Income			
Individual Worker Income	One Worker Households	Two Worker Households	Three or More Workers
\$25,000-\$30,000	1.37	2.60	4.04
\$30,000-\$40,000	1.25	2.54	3.72
\$40,000-\$50,000	1.26	2.25	2.93
\$50,000-\$60,000	1.28	2.09	2.78
\$60,000-\$80,000	1.13	1.95	2.39
\$80,000-\$100,000	1.09	1.72	2.04
\$100,000-\$125,000	1.08	1.66	1.93
\$125,000-\$150,000	1.05	1.52	1.74
\$150,000-\$250,000	1.05	1.36	1.50
Over \$250,000	1.03	1.14	1.16

Source: KMA analysis of 2015 to 2019 American Community Survey, Public Use Microdata Sample (PUMS) data.

A ratio of 1.0 in Table 3-7 indicates the household has no additional income beyond that of the individual worker. A ratio of 2.0 means total household income is twice what the individual worker earns. With a two-earner household, a ratio of 2.0 indicates each worker in the household earns about the same amount. A ratio above 2.0 would indicate the other worker in the household earns more, on average, while a ratio less than 2 indicates the other worker earned less. The ratio between worker income and overall household income decreases as worker pay increases. This is because workers with higher pay are more likely to represent the largest source of household income.

The ratios adjust employee incomes upward even for households with only one worker. This is in consideration of non-wage/salary income sources such as child support, disability, social security, investment income and others. Ratios for one-worker households at the lower end of the compensation range tend to be larger, an indication that these workers are more likely to derive a share of household income from non-employment sources such as social security.

Household income estimates for workers within each detailed occupation category are summarized in Appendix B. A separate estimate is provided for households with one, two, and three or more workers. Household income estimates are compared to HCD income criteria summarized in Table 2-1 to estimate the percent of worker households that would fall into each

income category. This is done for each potential combination of household size and number of workers in the household.

Step 6 – Household Size Distribution

In this step, the household size distribution of workers is estimated using U.S. Census data. In addition to the distribution in household sizes, the data also accounts for a range in the number of workers in households of various sizes. Table 3-8 indicates the percentage distribution utilized in the analysis. Application of these percentage factors accounts for the following:

- Households have a range in size and a range in the number of workers.
- Large households generally have more workers than smaller households.

Table 3-8. Percent of Households by Size and No. of Workers		
No. of Persons in Household	No. of Workers in Household	Percent of Total Households
1	1	14.698%
2	1	13.901%
	2	16.308%
3	1	5.831%
	2	8.671%
	3+	3.465%
4	1	4.4009%
	2	6.9667%
	3+	5.7836%
5	1	2.4403%
	2	3.8629%
	3+	3.2069%
6	1	2.6850%
	2	4.2504%
	3+	3.5286%
Total		100.0%

The result of Step 6 is a distribution of working households by number of workers and household size.

Step 7 – Estimate of Households that meet HCD Size and Income Criteria

Step 7 calculates the number of employee households that fall into each income category for each size household. This calculation is based on combining the household income distribution (Step 5) with the worker household size distribution (Step 6) to arrive at a distribution of worker households by income category. Table 3-14A at the end of this section shows the results by occupation category after completing Steps 5, 6 and 7 for the Extremely Low Income Tier. The methodology is repeated for each of the four income tiers (Tables 3-14B, 3-14C, and 3-14D).

3.2 Housing Demand by Income Level

Table 3-9 indicates the results of the analysis for each of the eight land use types. The table presents the number of households in each affordability category, the total number up to 120% of median, and the remaining households earning over 120% of median associated with a 100,000-square foot building.

Table 3-9. Number of Households by Income Category Per 100,000 Square Feet of Building								
	Office	Medical	Retail / Comm'l	Hotel	Industrial	R&D	Warehouse	Residential Care
Extremely Low	3.7	3.8	11.5	4.4	5.1	1.3	2.1	2.3
Very Low	22.8	22.8	35.7	14.0	21.7	6.5	7.9	8.0
Low	36.8	27.8	24.6	10.6	25.1	19.9	6.6	6.3
Moderate	<u>7.2</u>	<u>5.6</u>	<u>2.1</u>	<u>1.0</u>	<u>3.9</u>	<u>5.1</u>	<u>0.8</u>	<u>0.7</u>
Subtotal	70.5	60.1	73.8	30.0	55.7	32.9	17.4	17.2
Above 120% AMI	<u>91.7</u>	<u>79.0</u>	<u>23.5</u>	<u>10.5</u>	<u>41.6</u>	<u>64.4</u>	<u>7.0</u>	<u>7.1</u>
Total	162.2	139.1	97.3	40.6	97.3	97.3	24.3	24.3

Table 3-10 summarizes the percentage of worker households that fall into each income category. As indicated, over 70% of Retail/Commercial, Warehouse, Residential Care, and Hotel worker households earn less than the 120% of median income level. R&D space has the lowest percentage of workers under 120% of median at just 33.8% of worker households.

Table 3-10. Percentage of Households by Income Category								
	Office	Medical	Retail / Comm'l	Hotel	Industrial	R&D	Warehouse	Residential Care
Extremely Low	2.3%	2.7%	11.9%	10.9%	5.3%	1.4%	8.6%	9.4%
Very Low	14.1%	16.4%	36.6%	34.6%	22.3%	6.7%	32.6%	32.9%
Low	22.7%	20.0%	25.2%	26.2%	25.7%	20.5%	27.0%	25.7%
Moderate	<u>4.4%</u>	<u>4.0%</u>	<u>2.1%</u>	<u>2.3%</u>	<u>4.0%</u>	<u>5.3%</u>	<u>3.3%</u>	<u>2.7%</u>
Subtotal	43.5%	43.2%	75.9%	74.0%	57.2%	33.8%	71.4%	70.6%
Above 120% AMI	<u>56.5%</u>	<u>56.8%</u>	<u>24.1%</u>	<u>26.0%</u>	<u>42.8%</u>	<u>66.2%</u>	<u>28.6%</u>	<u>29.4%</u>
Total	100%	100%	100%	100%	100%	100%	100%	100%

3.3 Housing Demand Per Square Foot of Building Area

The analysis thus far has used 100,000-square foot buildings. In this step, the conclusions are translated to affordable housing demand per square foot of building area (see Table 3-11).

Table 3-11. New Worker Households Per Square Foot

	Office	Medical	Retail / Commercial	Hotel	Industrial	R&D	Warehouse	Residential Care
Extr. Low	0.0000371	0.0000382	0.0001154	0.0000442	0.0000514	0.0000134	0.0000209	0.0000228
Very Low	0.0002281	0.0002279	0.0003566	0.0001403	0.0002166	0.0000649	0.0000793	0.0000801
Low Income	0.0003676	0.0002784	0.0002457	0.0001064	0.0002506	0.0001994	0.0000657	0.0000626
Moderate	0.0000721	0.0000562	0.0000206	0.0000095	0.0000386	0.0000512	0.0000079	0.0000065
Total	0.0007049	0.0006007	0.0007384	0.0003003	0.0005572	0.0003289	0.0001738	0.0001719

Note: Figures in Table 3-11 are calculated by dividing findings from Table 3-9 by 100,000 square feet of building.

This is the summary of the housing nexus analysis, or the linkage from buildings to employees to housing demand, by income level. Estimates are conservative and most likely understate the number of worker households within the four affordability categories.

3.4 Affordability Gap

A key component of the analysis is the affordability gap, which represents the subsidy required to create each unit of affordable housing within each of the four categories of Area Median Income: Extremely Low (0% to 30% AMI), Very Low (30% to 50% AMI), Low (50% to 80% AMI), and Moderate (80% to 120% AMI). For Extremely Low, Very Low and Low Income units, the affordability gap assumes the City would assist affordable rental units financed with 4% tax credits. Moderate income units are also assumed to be assisted in an affordable rental unit; however, tax credit financing is not available for units above 80% AMI. This results in a larger financial gap for Moderate than Low or Very Low. See Section 4 for additional discussion and supporting calculations for the affordability gaps shown in Table 3-12, below.

Table 3-12. Affordability Gaps

Extremely Low (Under 30% AMI)	\$250,000
Very Low (30% to 50% AMI)	\$152,000
Low (50% to 80% AMI)	\$103,000
Moderate (80% to 120% AMI)	\$221,000

AMI = Area Median Income

See Section 4 for supporting analysis.

3.5 Maximum Supported Fees Per Square Foot of Building Area

The last step in the Nexus Analysis calculates the cost of delivering affordable housing to workers in new non-residential buildings. The demand for affordable units within each income category per square foot of building area from Table 3-11 is multiplied by the affordability gaps from Table 3-12 to determine the cost to mitigate the affordable housing impacts.

Affordability Gap (Table 3-12)	X	No. affordable units per square foot of building area. (from Table 3-11)	=	Maximum Fee Per Square Foot of Building Area
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The results of this calculation are presented in Table 3-13. The findings in Table 3-13 represent the maximum housing fee that could be charged to new non-residential developments to mitigate the development's impacts on the need for affordable housing. These figures are not recommended fee levels; they represent only the maximums established by this analysis.

Table 3-13. Maximum Supported Housing Fee Per Square Foot of Building Area.								
INCOME CATEGORY	Office	Medical	Retail / Comm'l	Hotel	Industrial	R&D	Warehouse	Residential Care
Extremely Low	\$9.30	\$9.50	\$28.80	\$11.00	\$12.90	\$3.30	\$5.20	\$5.70
Very Low	\$34.70	\$34.60	\$54.20	\$21.30	\$32.90	\$9.90	\$12.10	\$12.20
Low	\$37.90	\$28.70	\$25.30	\$11.00	\$25.80	\$20.50	\$6.80	\$6.40
Moderate	\$15.90	\$12.40	\$4.60	\$2.10	\$8.50	\$11.30	\$1.80	\$1.40
Total Mitigation Cost / Maximum Supported Fee	\$97.80	\$85.20	\$112.90	\$45.40	\$80.10	\$45.00	\$25.90	\$25.70

Note: Nexus findings are not recommended fee levels.

Total nexus or mitigation costs are driven by employment densities, the compensation levels of jobs, and the cost of developing residential units. Higher employment densities contribute to higher nexus costs. Retail has the highest nexus cost, driven by the combination of generally lower worker compensation levels and the density of employment. While hotel, warehouse and residential care have a similar percentage of their workforce at or below Moderate income as retail, the lower density of employment results in a lower nexus cost compared to retail.

3.6 Conservative Assumptions

In establishing maximum fees, conservative assumptions were employed in the analysis that result in a cost to mitigate affordable housing needs that may be considerably understated. These conservative assumptions include:

- Only direct employees are counted in the analysis. Many indirect employees are also associated with each new workspace. Indirect employees in an office building, for example, include security, delivery personnel, building cleaning and maintenance personnel, and a whole range of others. Hotels do have many of these workers on staff, but hotels also "contract out" services that are not taken into account in the analysis. For simplicity and because the results using only direct employees are significantly higher than the fee levels typically considered for adoption, we limit it to direct employees only.

- A downward adjustment has been reflected in the analysis to account for declining industries and the potential that displaced workers from declining sectors of the economy will fill a portion of new jobs. This is a conservative assumption because many displaced workers may exit the workforce by retiring and the adjustment is only necessary to the extent vacated space is not re-occupied.
- Annual incomes for workers reflect full time employment based upon EDD's convention for reporting the compensation information. In fact, many workers work less than full time; therefore, annual compensations for these workers is likely overstated.

In summary, less conservative assumptions could have been made that would have resulted in higher maximum fees. Use of these conservative assumptions helps ensure that maximum fee levels are not overstated and are helpful in simplifying the analysis. Even with the conservative assumptions noted above, maximum supported fee levels are substantial and provide significant discretion to the City in selecting a fee level.

TABLE 3-14A
ESTIMATE OF QUALIFYING HOUSEHOLDS - EXTREMELY LOW INCOME
COMMERCIAL / HOUSING NEXUS ANALYSIS
GOLETA, CA

Analysis for Households Earning up to 30% of Median

	Office	Medical	Retail / Commercial	Hotel	Industrial	Research and Development	Warehouse	Residential Care
Per 100,000 SF Building								
Households Earning up to 30% of Median (Step 5, 6, & 7) ⁽¹⁾								
Management	-	-	-	-	-	0.24	-	-
Business and Financial Operations	0.13	0.02	-	-	0.03	0.10	0.00	-
Computer and Mathematical	0.03	-	-	-	0.01	0.11	-	-
Architecture and Engineering	-	-	-	-	0.05	-	-	-
Life, Physical and Social Science	-	-	-	-	-	0.46	-	-
Community and Social Services	-	0.09	-	-	-	-	-	-
Legal	0.05	-	-	-	-	-	-	-
Education Training and Library	-	-	-	-	-	-	-	-
Arts, Design, Entertainment, Sports, and Media	0.12	-	-	-	-	-	-	-
Healthcare Practitioners and Technical	0.01	0.46	-	-	-	0.05	-	0.01
Healthcare Support	0.44	1.34	-	-	-	-	-	1.22
Protective Service	-	-	-	-	-	-	-	-
Food Preparation and Serving Related	-	0.48	5.78	1.18	-	-	-	0.53
Building Grounds and Maintenance	-	0.50	-	1.58	-	-	-	0.19
Personal Care and Service	-	-	0.27	0.17	-	-	-	0.10
Sales and Related	0.46	-	3.39	0.09	0.50	-	-	-
Office and Admin	1.83	0.67	0.27	0.85	0.53	0.25	0.22	0.08
Farm, Fishing, and Forestry	-	-	-	-	0.74	-	-	-
Construction and Extraction	-	-	-	-	-	-	-	-
Installation Maintenance and Repair	0.29	-	0.15	0.17	0.35	-	0.04	0.05
Production	-	-	0.23	0.14	1.83	-	0.05	-
Transportation and Material Moving	-	-	0.99	-	0.85	-	1.69	-
HH earning up to 30% of Median - major occupations	3.36	3.57	11.07	4.18	4.89	1.20	2.00	2.17
HH earning up to 30% of Median - all other occupations	0.35	0.25	0.46	0.24	0.25	0.13	0.09	0.11
Total Households Earning up to 30% of Median	3.7	3.8	11.5	4.4	5.1	1.3	2.1	2.3

Notes:

(1) Appendix Tables 1 through 16 contain additional information on worker occupation categories, compensation levels and estimated household incomes.

TABLE 3-14B
ESTIMATE OF QUALIFYING HOUSEHOLDS - VERY LOW INCOME
COMMERCIAL / HOUSING NEXUS ANALYSIS
GOLETA, CA

Analysis for Households Earning 30% to 50% of Median

	Office	Medical	Retail / Commercial	Hotel	Industrial	Research and Development	Warehouse	Residential Care
<i>Per 100,000 SF Building</i>								
Households Earning 30% to 50% of Median (Step 5, 6, & 7) ⁽¹⁾								
Management	0.39	0.12	0.16	0.10	0.15	0.31	0.03	0.03
Business and Financial Operations	1.46	0.25	-	-	0.37	0.80	0.04	-
Computer and Mathematical	0.73	-	-	-	0.13	0.62	-	-
Architecture and Engineering	0.16	-	-	-	0.27	0.18	-	-
Life, Physical and Social Science	-	-	-	-	-	1.94	-	-
Community and Social Services	-	0.93	-	-	-	-	-	-
Legal	0.26	-	-	-	-	-	-	-
Education Training and Library	-	-	-	-	-	-	-	-
Arts, Design, Entertainment, Sports, and Media	0.74	-	-	-	-	-	-	-
Healthcare Practitioners and Technical	0.20	2.99	-	-	-	0.31	-	0.14
Healthcare Support	2.84	8.99	-	-	-	-	-	4.31
Protective Service	-	-	-	-	-	-	-	-
Food Preparation and Serving Related	-	1.49	17.07	3.80	-	-	-	1.64
Building Grounds and Maintenance	-	1.58	-	4.69	-	-	-	0.56
Personal Care and Service	-	-	0.92	0.61	-	-	-	0.39
Sales and Related	2.12	-	10.14	0.28	1.66	-	-	-
Office and Admin	10.70	4.97	1.28	2.81	2.61	1.71	0.91	0.40
Farm, Fishing, and Forestry	-	-	-	-	1.86	-	-	-
Construction and Extraction	-	-	-	-	-	-	-	-
Installation Maintenance and Repair	1.07	-	0.58	0.59	1.77	-	0.16	0.16
Production	-	-	0.82	0.39	8.73	-	0.17	-
Transportation and Material Moving	-	-	3.27	-	3.08	-	6.28	-
HH earning 30% to 50% of Median - major occupations	20.67	21.32	34.23	13.27	20.61	5.86	7.60	7.62
HH earning 30% to 50% of Median - all other occupations	2.14	1.47	1.43	0.76	1.05	0.64	0.33	0.38
Total Households Earning 30% to 50% of Median	22.8	22.8	35.7	14.0	21.7	6.5	7.9	8.0

Notes:

(1) Appendix Tables 1 through 16 contain additional information on worker occupation categories, compensation levels and estimated household incomes.

TABLE 3-14C
ESTIMATE OF QUALIFYING HOUSEHOLDS - LOW INCOME
COMMERCIAL / HOUSING NEXUS ANALYSIS
GOLETA, CA

Analysis for Households Earning 50% to 80% of Median

	Office	Medical	Retail / Commercial	Hotel	Industrial	Research and Development	Warehouse	Residential Care
<i>Per 100,000 SF Building</i>								
Households Earning 50% to 80% of Median (Step 5, 6, & 7) ⁽¹⁾								
Management	1.74	0.76	0.57	0.37	0.65	1.52	0.11	0.15
Business and Financial Operations	5.81	0.93	-	-	1.61	2.92	0.16	-
Computer and Mathematical	3.77	-	-	-	0.81	2.16	-	-
Architecture and Engineering	1.57	-	-	-	1.29	2.23	-	-
Life, Physical and Social Science	-	-	-	-	-	6.16	-	-
Community and Social Services	-	1.62	-	-	-	-	-	-
Legal	0.61	-	-	-	-	-	-	-
Education Training and Library	-	-	-	-	-	-	-	-
Arts, Design, Entertainment, Sports, and Media	1.09	-	-	-	-	-	-	-
Healthcare Practitioners and Technical	0.65	9.02	-	-	-	0.44	-	0.74
Healthcare Support	2.38	6.32	-	-	-	-	-	2.71
Protective Service	-	-	-	-	-	-	-	-
Food Preparation and Serving Related	-	1.00	10.98	2.57	-	-	-	1.11
Building Grounds and Maintenance	-	1.06	-	3.24	-	-	-	0.38
Personal Care and Service	-	-	0.69	0.45	-	-	-	0.28
Sales and Related	2.89	-	6.59	0.29	1.78	-	-	-
Office and Admin	11.48	5.32	1.36	2.16	3.06	2.55	0.98	0.38
Farm, Fishing, and Forestry	-	-	-	-	1.16	-	-	-
Construction and Extraction	-	-	-	-	-	-	-	-
Installation Maintenance and Repair	1.33	-	0.67	0.74	3.01	-	0.23	0.20
Production	-	-	0.59	0.25	8.14	-	0.16	-
Transportation and Material Moving	-	-	2.14	-	2.33	-	4.66	-
HH earning 50% to 80% of Median - major occupations	33.32	26.04	23.59	10.06	23.85	17.99	6.29	5.96
HH earning 50% to 80% of Median - all other occupations	3.44	1.80	0.98	0.58	1.21	1.95	0.27	0.30
Total Households Earning 50% to 80% of Median	36.8	27.8	24.6	10.6	25.1	19.9	6.6	6.3

Notes:

(1) Appendix Tables 1 through 16 contain additional information on worker occupation categories, compensation levels and estimated household incomes.

TABLE 3-14D
ESTIMATE OF QUALIFYING HOUSEHOLDS - MODERATE INCOME
COMMERCIAL / HOUSING NEXUS ANALYSIS
GOLETA, CA

Analysis for Households Earning 80% to 120% of Median

	Office	Medical	Retail / Commercial	Hotel	Industrial	Research and Development	Warehouse	Residential Care
<i>Per 100,000 SF Building</i>								
Households Earning 80% to 120% of Median (Step 5, 6, & 7) ⁽¹⁾								
Management	0.74	0.19	0.18	0.12	0.33	0.57	0.04	0.05
Business and Financial Operations	1.30	0.20	-	-	0.36	0.61	0.04	-
Computer and Mathematical	1.04	-	-	-	0.24	0.63	-	-
Architecture and Engineering	0.52	-	-	-	0.43	0.85	-	-
Life, Physical and Social Science	-	-	-	-	-	1.52	-	-
Community and Social Services	-	0.30	-	-	-	-	-	-
Legal	0.12	-	-	-	-	-	-	-
Education Training and Library	-	-	-	-	-	-	-	-
Arts, Design, Entertainment, Sports, and Media	0.21	-	-	-	-	-	-	-
Healthcare Practitioners and Technical	0.36	3.06	-	-	-	0.10	-	0.16
Healthcare Support	0.29	0.68	-	-	-	-	-	0.20
Protective Service	-	-	-	-	-	-	-	-
Food Preparation and Serving Related	-	0.08	0.84	0.22	-	-	-	0.09
Building Grounds and Maintenance	-	0.08	-	0.23	-	-	-	0.03
Personal Care and Service	-	-	0.07	0.05	-	-	-	0.03
Sales and Related	0.50	-	0.44	0.04	0.26	-	-	-
Office and Admin	1.34	0.65	0.16	0.17	0.37	0.35	0.12	0.05
Farm, Fishing, and Forestry	-	-	-	-	0.07	-	-	-
Construction and Extraction	-	-	-	-	-	-	-	-
Installation Maintenance and Repair	0.12	-	0.07	0.06	0.44	-	0.02	0.02
Production	-	-	0.06	0.01	0.91	-	0.02	-
Transportation and Material Moving	-	-	0.18	-	0.25	-	0.52	-
HH earning 80% to 120% of Median - major occupations	6.54	5.25	1.98	0.90	3.68	4.62	0.76	0.62
HH earning 80% to 120% of Median - all other occupations	0.68	0.36	0.08	0.05	0.19	0.50	0.03	0.03
Total Households Earning 80% to 120% of Median	7.2	5.6	2.1	1.0	3.9	5.1	0.8	0.7

Notes:

(1) Appendix C Tables 1 through 16 contain additional information on worker occupation categories, compensation levels and estimated household incomes.

4.0 AFFORDABILITY GAP ANALYSIS

A key component of an impact analysis is the mitigation cost. In an affordable housing nexus analysis, the mitigation cost is the “affordability gap” - the financial gap between what lower income households can afford to pay and the cost of producing new housing. The affordability gap analysis identifies the financial assistance required to produce each unit of affordable housing that is needed to mitigate the affordable housing impacts of new development, using affordable housing impact fee funds. For Extremely Low, Very Low and Low Income units, the affordability gap analysis is based on the remaining financial gap after assistance available through federal Low Income Housing Tax Credits (LIHTC). For Moderate-income units, the affordability gap is analyzed for both an affordable rental and affordable ownership unit type. For the affordable rental unit, the affordability gap is equal to the difference between the estimated development costs of a Moderate-income rental unit and the amount of developer investment that can be supported based on Moderate-income rents. For the Moderate-income for-sale unit, the affordability gap is based on the difference between the estimated development cost of the unit and the affordable purchase price.

4.1 City-Assisted Affordable Unit Prototypes

To estimate the affordability gap, there is a need to match a household of each income level with a unit type and size according to governmental regulations and City practices and policies. The prototype affordable unit should reflect a modest unit consistent with affordable developments that the City is likely to provide financial assistance to using affordable housing impact fee funds. The focus is on affordable projects developed for families rather than projects consisting of primarily studios or single room occupancy units that would be too small to accommodate a typical-size worker household, given the purpose of the fee is to address affordable housing needs of workers and should reflect units that meet housing needs of the workforce more broadly.

It is assumed that the City will use impact fee funds to provide financial assistance for development of multi-family rental units averaging approximately 2.25 bedrooms per unit consistent with recent and proposed affordable rental projects being developed in nearby communities. Providing financial assistance to for-sale developments tends to be less common; however, the analysis also evaluates an affordability gap for a prototype for-sale affordable development that receives financial assistance from the City. For purposes of the for-sale affordability gap analysis, a three-bedroom attached unit with wood-frame construction is analyzed. As the affordability gap for a Moderate-income for-sale unit was found to be somewhat greater than a Moderate-income rental unit, the lower cost rental affordability gap is used for purposes of the fee calculations as a conservative assumption.

4.2 Development Costs

KMA prepared an estimate of total development costs for the affordable housing prototype unit described above (inclusive of land acquisition costs, direct construction costs, indirect costs of development and financing). The development cost estimate reflects the average for six, multi-family affordable rental projects in nearby cities, listed below. Costs for each project are summarized in Table 4-4.

- Escalante Meadows (Guadalupe)
- Centennial Gardens (Santa Maria)
- Coastal Meadows (Lompoc)
- Mountain View Apartments (Fillmore)
- Vintage at Sycamore (Simi Valley)
- Westview Village Ph III (Ventura)

The projects were selected as the nearest multi-family affordable projects that reflect recent 2020 development cost information and new construction. As there were no such projects in Goleta, it was necessary to identify projects in other communities. The most recent multi-family affordable rental project in Goleta was part of the Village at Los Carneros development; however, costs are as of 2016, not recent enough to use for purposes of the affordability gap analysis. Other recent projects such as Isla Vista Apartments were not used because they represent rehabilitation of existing units rather than new construction. Based on cost data for the six recent projects, the total development cost for the prototype rental affordable unit is estimated to be \$544,000 per unit. KMA recommends updating the analysis to reflect current development cost and affordability gap data approximately every five years.

4.3 Unit Values

For the Extremely Low, Very Low, and Low-income rental units, unit values are based upon the funding sources assumed to be available for the project. Funding sources include tax-exempt permanent debt financing supported by the project's operating income, a deferred developer fee, and equity generated by 4% federal low income housing tax credits. The highly competitive 9% federal tax credits are not assumed because of the limited number of projects that receive an allocation of 9% tax credits in any given year per geographic region. Other affordable housing subsidy sources, such as CDBG, HOME, AHP, Section 8, and various federal and State funding programs are also limited and difficult to obtain and therefore are not assumed in this analysis as available to offset the cost of mitigating the affordable housing impacts of new development. For the Moderate-income rental, the unit value reflects the estimated debt and equity investment supportable based on the project's net operating income. Tax credit financing is not available to offset the cost of the Moderate-income unit. The estimated unit values are summarized in Table 4-1. Further detail is provided in Table 4-3.

Table 4-1. Unit Values for Affordable Units		
<i>Income Group</i>	<i>Unit Tenure / Type</i>	<i>Unit Value</i>
Extremely Low (Under 30% AMI)	Rental	\$294,000
Very Low (30% to 50% AMI)	Rental	\$392,000
Low (50% to 80% AMI)	Rental	\$441,000
Moderate (80% to 120% AMI)	Rental	\$323,000

4.4 Affordability Gap

The affordability gap is the difference between the cost of developing the affordable units and the unit value based on the restricted affordable rent. The resulting affordability gaps are as presented in Table 4-2.

Table 4-2. Affordability Gap Calculation			
	<i>Unit Value</i>	<i>Development Cost</i>	<i>Affordability Gap</i>
Extremely Low (Under 30% AMI)	\$294,000	\$544,000	\$250,000
Very Low (30% to 50% AMI)	\$392,000	\$544,000	\$152,000
Low (50% to 80% AMI)	\$441,000	\$544,000	\$103,000
Moderate (80% to 120% AMI)	\$323,000	\$544,000	\$221,000

Detailed analysis tables supporting the affordability gap calculations are provided in Tables 4-3 and 4-4.

The affordability gap for the Moderate-income for-sale unit is estimated at approximately \$248,000, about 12% greater than the \$221,000 estimated with a Moderate-income rental unit. For purpose of the analysis, the lower cost rental unit gap was utilized. The analysis for a Moderate-income for-sale unit is provided in Tables 4-5 and 4-6.

TABLE 4-3
AFFORDABLE RENTAL UNIT AFFORDABILITY GAP
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS STUDY
GOLETA, CA

	Extremely Low	Very Low	Low Income	Moderate Income
I. Affordable Prototype				
Tenure				
Average No. of Bedrooms				
				Rental 2.25 Bedrooms
II. Development Costs ^[1]				
	Per Unit	Per Unit	Per Unit	Per Unit
Land				\$45,000
Direct Construction				\$335,000
Indirect Costs				\$134,000
Financing				\$30,000
Total Development Costs				\$544,000
III. Supported Financing				
	Per Unit	Per Unit	Per Unit	Per Unit
<u>Affordable Rents</u>				
Average Number of Bedrooms		2.25 BR		
Maximum TCAC Rent ^[2]	\$876	\$1,460	\$1,752	\$2,292
(Less) Utility Allowance ^[3]	(\$77)	(\$77)	(\$77)	(\$77)
Maximum Monthly Rent	\$799	\$1,384	\$1,676	\$2,216
<u>Net Operating Income (NOI)</u>				
Gross Potential Income				
Monthly	\$799	\$1,384	\$1,676	\$2,216
Annual	\$9,591	\$16,605	\$20,109	\$26,588
Other Income	\$75	\$75	\$75	\$75
(Less) Vacancy 5.0%	(\$483)	(\$834)	(\$1,009)	(\$1,333)
Effective Gross Income (EGI)	\$9,183	\$15,846	\$19,175	\$25,329
(Less) Operating Expenses	(\$5,900)	(\$5,900)	(\$5,900)	(\$5,900)
(Less) Property Taxes ^[4]	\$0	\$0	\$0	(\$3,600)
Net Operating Income (NOI)	\$3,283	\$9,946	\$13,275	\$15,829
<u>Permanent Financing</u>				
Permanent Loan 4.20%	\$48,000	\$146,000	\$195,000	\$232,000
Deferred Developer Fee	\$28,000	\$28,000	\$28,000	\$28,000
4% Tax Credit Equity/Developer Equity ^[5]	\$218,000	\$218,000	\$218,000	\$63,000
Total Sources	\$294,000	\$392,000	\$441,000	\$323,000
IV. Affordability Gap				
	Per Unit	Per Unit	Per Unit	Per Unit
Supported Permanent Financing	\$294,000	\$392,000	\$441,000	\$323,000
(Less) Total Development Costs	(\$544,000)	(\$544,000)	(\$544,000)	(\$544,000)
Affordability Gap	(\$250,000)	(\$152,000)	(\$103,000)	(\$221,000)

^[1] Development costs estimated by KMA based on recent projects in summarized in Table 4-4.

^[2] Maximum rents per Tax Credit Allocation Committee (TCAC) for projects utilizing Low Income Housing Tax Credits.

^[3] Utility allowances from Santa Barbara County Housing Authority (January 2021). Assumes tenant pays for gas heat, gas stove, gas water heating, gas base charges and general electric.

^[4] Assumes tax exemption for non-profit general partner for units under 80% AMI. Property taxes for Moderate Income estimated based on estimated value with affordability restriction and a 1.15% tax rate.

^[5] Estimated by KMA at 40% of cost based on recent 4% tax credit projects in the County and surrounding area. Moderate Income units over 80% AMI are not eligible for tax credits. Supported equity for moderate income is estimated based on a capitalization rate of 4.9%, which reflects a 0.5% premium over a market rate cap rate of 4.4% less debt financing. A cap rate is used rather than a return on cost as the developer receives a return through a developer fee included in project costs.

TABLE 4-4
DEVELOPMENT COSTS FOR RECENT AFFORDABLE HOUSING PROJECTS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS STUDY
GOLETA, CA

	Escalante Meadows	Centennial Gardens	Coastal Meadows	Westview Village Ph III	Mountain View Apts	Vintage at Sycamore	Average
Year for cost data	2020	2020	2020	2020	2020	2020	
Jurisdiction	Guadalupe	Santa Maria	Lompoc	Ventura	Fillmore	Simi Valley	
Number of Units	40	118	40	105	77	99	80
Avg No. Bedrooms	2.70	2.68	3.00	2.30	1.77	1.01	2.2
Avg. unit size (SF)	1,001	1,455	1,385	1,066	1,056	570	1,089
No. stories	2	3	2	2	3	3	
Land	\$84,163	\$18,750	\$62,500	\$63,377	\$46,394	\$53,817	\$54,834
Direct Construction	\$469,434	\$249,579	\$337,517	\$403,734	\$377,234	\$164,688	\$333,698
Indirect Costs	\$145,656	\$84,662	\$126,048	\$160,153	\$158,483	\$83,126	\$126,355
Financing	<u>\$32,283</u>	<u>\$14,191</u>	<u>\$16,817</u>	<u>\$35,777</u>	<u>\$30,068</u>	<u>\$19,527</u>	<u>\$24,777</u>
Total Development Cost	\$731,535	\$367,182	\$542,881	\$663,041	\$612,179	\$321,158	\$539,663

TABLE 4-5
MODERATE INCOME FOR-SALE UNIT AFFORDABILITY GAP
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS STUDY
GOLETA, CA

Moderate
(110% AMI)

I. Affordable Prototype

Tenure	For Sale
Density	15 du/a
Average Number of Bedrooms	3 BR

II. Development Costs	Per Unit
------------------------------	----------

Land	\$70,000
Direct Construction	\$400,000
Indirect Costs	\$160,000
Financing	<u>\$20,000</u>
Total Development Costs	\$650,000

III. Affordability Gap	Per Unit
-------------------------------	----------

Affordable Sales Price (Table 4-6)	\$402,400
(Less) Total Development Costs	(\$650,000)
Affordability Gap	<u>(\$247,600)</u>

TABLE 4-6
AFFORDABLE SALES PRICE CALCULATION
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS STUDY
CITY OF GOLETA, CA

	Townhome
Unit Size (Bedroom)	3-Bedroom
Household Size	<u>4-person HH</u>
Santa Barbara County 2020 Median Income	\$90,100
Moderate Income Home Price at 110% of AMI	\$99,110
% for Housing Costs	35%
Available for Housing Costs	\$34,689
(Less) Property Taxes	(\$4,600)
(Less) HOA	(\$2,400)
(Less) Utilities	(\$3,348)
(Less) Hazard Insurance ⁽³⁾	(\$700)
(Less) Mortgage Insurance	(\$3,040)
Income Available for Mortgage	<u>\$20,601</u>
Supported Mortgage	\$382,300
Down Payment @5%	\$20,100
Home Price @110% AMI	<u>\$402,400</u>
<u>Expense Assumptions</u>	
- HOA	\$200
- Utilities ⁽¹⁾	\$279
<u>Common Assumptions</u>	
- Mortgage Interest Rate	3.50% Freddie Mac avg. 30-year fixed rate mortgages, 2019 and 2020
- Down Payment	5.00% City of Goleta affordable prices.
- Property Taxes (% of sales price)	1.15% Average, recently sold homes in Goleta.
- Mortgage Insurance ⁽²⁾	0.80% loans up to \$625,000
	1.00% loans over \$625,000

(1) Utility allowances per Santa Barbara County Housing Authority (2021).

(2) Based on FHA mortgage insurance premium schedule.

(3) Estimated based on sample quotes for units in Goleta. Reflects a "walls-in" policy.

5.0 MITIGATION FEE ACT FINDINGS

This section provides draft findings language for potential use by the City in adopting affordable housing impact fees consistent with the requirements of the Mitigation Fee Act, as set forth in Government Code § 66000 et seq.

(1) Identify the purpose of the fee (66001(a)(1)).

The purpose of the housing fee is to fund construction of affordable housing to mitigate the increased demand for affordable housing from workers in newly developed workplace buildings.

(2) Identify the use to which the fee is to be put (66001(a)(2)).

Housing fees are used to increase the supply of affordable housing for qualifying households.

(3) Determine how there is a reasonable relationship between the fee's use and the type of development project on which the fee is imposed (66001(a)(3)).

The Nexus Analysis, prepared by KMA in 2021, has demonstrated that there is a reasonable relationship between the use of the fee, which is to increase the supply of affordable housing in the City, and the development of new non-residential buildings which increases the need for affordable housing. Development of new non-residential buildings increases the number of jobs in the City. A share of the new workers in these new jobs will have household incomes that qualify as Extremely Low, Very Low, Low and Moderate income and result in an increased need for affordable housing. Therefore, the finding that there is a reasonable relationship between the fee's use and the type of development project on which the fee is imposed can be made.

(4) Determine how there is a reasonable relationship between the need for the public facility and the type of development project on which the fee is imposed (66001(a)(4)).

The Nexus Analysis, prepared by KMA in 2021, has demonstrated that there is a reasonable relationship between the development of non-residential workspace buildings in Goleta and the need for additional affordable units. Development of new workspace buildings accommodates additional jobs in Goleta. Eight different non-residential uses were analyzed (office, medical, retail / commercial, hotel, industrial, R&D, warehouse, and residential care). The number of jobs added by various types of non-residential development is documented in Table 3-2 of the Nexus Analysis. Based on household income levels for the new workers in these new jobs, a significant share of

the need is for housing affordable to Extremely Low, Very Low, Low and Moderate income levels. The Nexus Analysis concludes that for every 100,000 square feet of new office space, 70.5 additional affordable units are needed. For Medical, 60.1 affordable units are needed per 100,000 square feet of space developed, 73.8 for Retail / Commercial, 30 for Hotel, 55.7 for Industrial, 32.9 for Research and Development, 17.4 for Warehouse and 17.2 for Residential Care. Therefore, the finding that there is a there is a reasonable relationship between the need for the public facility and the type of development project on which the fee is imposed can be made.

(5) Determine how there is a reasonable relationship between the amount of the fee and the cost of the public facility or portion of the public facility attributable to the development on which the fee is imposed. (66001(b)).

There is a reasonable relationship between the amount of the fee and the cost of the needed affordable housing attributable to the new non-residential development. The Nexus Analysis, prepared by KMA in 2021 has quantified the increased need for affordable units in relation to each type of new non-residential use being developed and determined maximum fee levels based on the cost of providing the needed affordable housing. Costs reflect the net subsidy required to produce the affordable units based on recent cost information for development of affordable housing. Housing fees do not exceed the cost of providing the affordable housing that is attributable to the new development. Therefore, the finding that there is a reasonable relationship between the amount of the fee and the cost of the public facility or portion of the public facility attributable to the development on which the fee is imposed can be made.

(6) A fee shall not include the costs attributable to existing deficiencies in public facilities (66001(g)).

The Nexus Analysis quantifies only the net new affordable housing needs generated by new non-residential development in Goleta. Existing deficiencies with respect to housing conditions in the City are not considered nor in any way included in the analysis.

APPENDIX A: DISCUSSION OF VARIOUS FACTORS IN RELATION TO NEXUS CONCEPT

This appendix includes a discussion of various factors and assumptions in relation to the Nexus Analysis and describes the validity of certain assumptions in Goleta.

1. No Excess Supply of Affordable Housing

An assumption of this Nexus Analysis is that there is no excess supply of affordable housing available to absorb or offset new demand; therefore, new affordable units are needed to mitigate the new affordable housing demand generated by new non-residential development. Based on a review of recent Census information for the City and other sources, conditions in Goleta are consistent with the underlying assumption that no excess supply of housing affordable to Extremely Low, Very Low, Low and Moderate income households exists, as evidenced by the following:

- Census data for Goleta from the 2015 to 2019 American Community Survey shows 40% of all households in the City are paying thirty percent or more of their income on housing.
- For households earning less than \$75,000 per year, a group that includes 41% of all households in the City, 71% are paying thirty percent or more of their income on housing according to the U.S. Census 2015 to 2019 American Community Survey.
- Development of new rental units affordable to Extremely Low, Very Low, Low and Moderate income households is unlikely to occur without a subsidy because rents affordable to these income groups are not sufficient to support the high cost of construction, as demonstrated in Section 4.

2. Addressing the Housing Needs of a New Population vs. the Existing Population

This Nexus Analysis assumes there is no excess supply of affordable housing available to absorb or offset new demand; therefore, new affordable units are needed to mitigate the new affordable housing demand generated by development of new workplace buildings.

This Nexus Analysis does not address the housing needs of the existing population. Rather, the study focuses exclusively on documenting and quantifying the housing needs created by development of new workplace buildings.

3. Substitution Factor

Any given new building may be occupied partly, or even perhaps totally, by employees relocating from elsewhere in the region. Buildings are often leased entirely to firms relocating from other buildings in the same jurisdiction. However, when a firm relocates to a new building from elsewhere in the region, there is a space in an existing building that is vacated and occupied by another firm. That building in turn may be filled by some combination of newcomers

to the area and existing workers. Somewhere in the chain there are jobs new to the region. The net effect is that new workplace buildings accommodate new employees, although not necessarily inside the new buildings themselves.

4. Indirect Employment and Multiplier Effects

The multiplier effect refers to the concept that the income generated by a new job recycles through the economy and results in additional jobs. The total number of jobs generated is broken down into three categories – direct, indirect and induced. In the case of this Nexus Analysis, the direct jobs are those located in the new workspace buildings that would be subject to the housing fee. Multiplier effects encompass indirect and induced employment. Indirect jobs are generated by suppliers to the businesses located in the new workspace buildings. Induced jobs are generated by local spending on goods and services by employees.

Multiplier effects vary by industry. Industries that draw heavily on a network of local suppliers tend to generate larger multiplier effects. Industries that are labor intensive also tend to have larger multiplier effects as a result of the induced effects of employee spending.

Theoretically, a jobs-housing nexus analysis could consider multiplier effects although the potential for double-counting exists to the extent indirect and induced jobs are added in other new buildings in jurisdictions that have housing fees. KMA chose to omit the multiplier effects (the indirect and induced employment impacts) to avoid potential double-counting and make the analysis more conservative.

In addition, the Nexus Analysis addresses direct “inside” employment only. In the case of an office building, for example, direct employment covers the various managerial, professional and clerical people that work in the building; it does not include delivery services, landscape maintenance workers, janitorial contractors and many others that are associated with the normal functioning of an office building. In other words, any analysis that ties lower income housing to the number of workers inside buildings will continue to understate the demand. Thus, confining the analysis to the direct employees does not address all the lower income workers associated with each type of building and understates the impacts.

5. Economic Cycles

An impact analysis of this nature is intended to support a one-time impact requirement to address impacts generated over the life of a project (generally 40 years or more). Short-term conditions, such as a recession or a vigorous boom period, are not an appropriate basis for estimating impacts over the life of the building. These cycles can produce impacts that are higher or lower on a temporary basis.

Development of new workspace buildings tends to be minimal during a recession and generally remains minimal until conditions improve or there is confidence that improved conditions are

imminent. When this occurs, the improved economic condition will absorb existing vacant space and underutilized capacity of existing workers, employed and unemployed. By the time new buildings become occupied, conditions will have likely improved.

To the limited extent that new workspace buildings are built during a recession, housing impacts from these new buildings may not be fully experienced immediately, but the impacts will be experienced at some point. New buildings delivered during a recession can sometimes sit vacant for a period after completion. Even if new buildings are immediately occupied, overall absorption of space can still be zero or negative if other buildings are vacated in the process. Jobs added may also be filled in part by unemployed or underemployed workers who are already housed locally. As the economy recovers, firms will begin to expand and hire again filling unoccupied space as unemployment is reduced. New space delivered during the recession still adds to the total supply of employment space in the region. Though the jobs are not realized immediately, as the economy recovers and vacant space is filled, this new employment space absorbs or accommodates job growth. Although there may be a delay in experiencing the impacts, the fundamental relationship between new buildings, added jobs, and housing needs remains over the long term.

In contrast, during a vigorous economic boom period, conditions exist in which elevated impacts are experienced on a temporary basis. As an example, compression of employment densities can occur as firms add employees while making do with existing space.

While economic cycles can produce impacts that are temporarily higher or lower than normal, an impact fee is designed to be collected once, during the development of the project. Over the lifetime of the project, the impacts of the development on the demand for affordable housing will be realized, despite short-term booms and recessions.

6. Compatibility with Inclusionary Ordinance

The Inclusionary Housing policies of the City's General Plan are included in Goleta Municipal Code, Title 17 (Zoning) within Chapter 17.28 and, for purposes of this study, are referred to as the Inclusionary Housing Ordinance (IHO). The IHO was adopted in 2020 and applies to residential developments with two or more units. The City also contemplates adopting a non-residential affordable housing impact fee or "commercial linkage fee" that mitigates the affordable housing impacts of new non-residential development. These two programs are fully compatible with one another, and implementation does not result in any duplication in terms of mitigation of affordable housing impacts of new development.

In contrast to affordable housing impact fees contemplated to be applied to non-residential development projects, the IHO is not limited in purpose or extent to mitigation of impacts of new development. The purposes and intent of the IHO are much broader, as listed on the following page. As long as the Goleta housing market is consistent with the underlying assumption described in Appendix A, No. 1, that there is no excess supply of affordable housing available to

meet the needs of new workers, which includes consideration of units produced through the IHO, proposed non-residential affordable housing fees applicable to non-residential development remain a valid requirement fully compatible with implementation of the IHO.

The purposes and intent of the IHO, excerpted from Section 17.28.010 of the City's Municipal Code, are as follows:

- A. Implement Statewide policies to make available an adequate supply of housing for persons and households from all economic sectors of the community because persons with low and moderate incomes who work and/or live within the City are unable to locate housing at prices they can afford and are increasingly excluded from living in the City;*
- B. Support General Plan policies intended to promote and maintain balanced and economically diverse community with a mix of workplaces and residential uses that offer a variety of housing types to meet the needs of an economically diverse work force, thereby reducing both adverse impacts on air quality and energy consumed by commuting;*
- C. Avoid the depletion of limited land resources needed to accommodate the demand for housing that is affordable to low- and moderate-income households by requiring the development of affordable housing when market-rate units are constructed, which is a more efficient use of land;*
- D. Construct new affordable units on the same site as new market-rate construction and only when this is infeasible, provide comparable new or substantially rehabilitated affordable units at another site or similar neighborhood character;*
- E. Establish standards and procedures to implement the inclusionary housing requirements in a streamlined manner that complies with Federal and State law; and*
- F. Provide additional incentives for the development of affordable housing units that exceed those to which developers are entitled under State law.*

The primary intent of the inclusionary requirement is to achieve the construction of new affordable units on site.

APPENDIX B: SUPPORTING TECHNICAL ANALYSIS TABLES

Addressing: worker occupations, compensations, household incomes, and industry categories

APPENDIX B TABLE 1
ESTIMATED WORKER OCCUPATION DISTRIBUTION, 2019
OFFICE WORKERS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

	Worker Occupation Distribution Office
Major Occupations (2% or more)	
Management Occupations	10.0%
Business and Financial Operations Occupations	12.6%
Computer and Mathematical Occupations	12.3%
Architecture and Engineering Occupations	6.3%
Legal Occupations	2.1%
Arts, Design, Entertainment, Sports, and Media Occupations	2.3%
Healthcare Practitioners and Technical Occupations	9.0%
Healthcare Support Occupations	5.0%
Sales and Related Occupations	6.2%
Office and Administrative Support Occupations	22.3%
Installation, Maintenance, and Repair Occupations	2.5%
All Other Worker Occupations - Office	<u>9.4%</u>
TOTAL	100.0%

APPENDIX B TABLE 2
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
OFFICE WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation ¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total Office Workers
		One Worker	Two Workers	Three+ Workers		
Page 1 of 4						
<i>Management Occupations</i>						
Chief Executives	\$195,300	\$206,000	\$266,000	\$292,000	3.0%	0.3%
General and Operations Managers	\$125,000	\$131,000	\$190,000	\$218,000	24.2%	2.4%
Marketing Managers	\$163,900	\$173,000	\$224,000	\$245,000	5.8%	0.6%
Sales Managers	\$132,500	\$139,000	\$201,000	\$231,000	5.0%	0.5%
Administrative Services and Facilities Managers	\$106,000	\$115,000	\$176,000	\$205,000	3.6%	0.4%
Computer and Information Systems Managers	\$186,600	\$197,000	\$255,000	\$279,000	11.4%	1.1%
Financial Managers	\$143,800	\$150,000	\$218,000	\$251,000	11.5%	1.2%
Human Resources Managers	\$132,600	\$139,000	\$201,000	\$231,000	2.4%	0.2%
Architectural and Engineering Managers	\$180,000	\$190,000	\$246,000	\$269,000	4.9%	0.5%
Medical and Health Services Managers	\$124,700	\$135,000	\$207,000	\$241,000	3.8%	0.4%
Property, Real Estate, and Com. Assoc. Managers	\$67,300	\$76,000	\$131,000	\$161,000	8.4%	0.8%
Personal Service, Enter. and Recreation Managers	\$133,600	\$140,000	\$203,000	\$233,000	5.9%	0.6%
Other Management Occupations	<u>\$138,100</u>	<u>\$144,000</u>	<u>\$209,000</u>	<u>\$241,000</u>	<u>10.0%</u>	<u>1.0%</u>
Weighted Mean Annual Wage	\$138,100	\$146,000	\$206,000	\$235,000	100.0%	10.0%
<i>Business and Financial Operations Occupations</i>						
Buyers and Purchasing Agents	\$73,900	\$84,000	\$144,000	\$177,000	2.7%	0.3%
Claims Adjusters, Examiners, and Investigators	\$74,900	\$85,000	\$146,000	\$179,000	2.6%	0.3%
Compliance Officers	\$70,200	\$80,000	\$137,000	\$168,000	2.4%	0.3%
Human Resources Specialists	\$72,700	\$83,000	\$142,000	\$174,000	6.1%	0.8%
Management Analysts	\$83,000	\$91,000	\$143,000	\$170,000	9.9%	1.3%
Training and Development Specialists	\$71,600	\$81,000	\$140,000	\$171,000	3.3%	0.4%
Market Research Analysts and Marketing Specialists	\$68,000	\$77,000	\$133,000	\$163,000	11.5%	1.4%
Project Management and Business Operations Specialists	\$71,300	\$81,000	\$139,000	\$171,000	14.7%	1.8%
Accountants and Auditors	\$85,400	\$93,000	\$147,000	\$175,000	19.6%	2.5%
Personal Financial Advisors	\$157,000	\$166,000	\$214,000	\$235,000	2.3%	0.3%
Loan Officers	\$115,500	\$125,000	\$192,000	\$223,000	4.6%	0.6%
Financial, Investment, and Risk Specialists	\$93,900	\$103,000	\$162,000	\$192,000	6.3%	0.8%
Other Business and Financial Operations Occupations	<u>\$82,000</u>	<u>\$90,000</u>	<u>\$141,000</u>	<u>\$168,000</u>	<u>14.1%</u>	<u>1.8%</u>
Weighted Mean Annual Wage	\$82,000	\$91,000	\$147,000	\$176,000	100.0%	12.6%
<i>Computer and Mathematical Occupations</i>						
Computer Systems Analysts	\$111,900	\$121,000	\$186,000	\$216,000	11.8%	1.5%
Information Security Analysts	\$101,200	\$109,000	\$168,000	\$196,000	2.6%	0.3%
Computer Network Support Specialists	\$73,400	\$83,000	\$143,000	\$176,000	3.0%	0.4%
Computer User Support Specialists	\$59,100	\$76,000	\$123,000	\$164,000	11.9%	1.5%
Computer Network Architects	\$116,100	\$126,000	\$193,000	\$225,000	3.1%	0.4%
Network and Computer Systems Administrators	\$100,400	\$109,000	\$167,000	\$194,000	5.8%	0.7%
Database Administrators and Architects*	\$77,800	\$88,000	\$152,000	\$186,000	2.3%	0.3%
Computer Programmers	\$99,600	\$109,000	\$172,000	\$204,000	4.9%	0.6%
Software Developers and Quality Assurance Analysts	\$113,600	\$123,000	\$188,000	\$220,000	39.8%	4.9%
Web Developers and Digital Interface Designers*	\$83,200	\$91,000	\$143,000	\$170,000	3.9%	0.5%
Computer Occupations, All Other	\$80,300	\$88,000	\$138,000	\$164,000	7.0%	0.9%
Other Computer and Mathematical Occupations	<u>\$99,100</u>	<u>\$108,000</u>	<u>\$171,000</u>	<u>\$203,000</u>	<u>3.9%</u>	<u>0.5%</u>
Weighted Mean Annual Wage	\$99,100	\$109,000	\$170,000	\$201,000	100.0%	12.3%

APPENDIX B TABLE 2
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
OFFICE WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation ¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total Office Workers
		One Worker	Two Workers	Three+ Workers		
<i>Architecture and Engineering Occupations</i>						
Architects, Except Landscape and Naval	\$108,400	\$117,000	\$180,000	\$210,000	10.1%	0.6%
Surveyors	\$105,300	\$114,000	\$175,000	\$204,000	3.7%	0.2%
Civil Engineers	\$113,500	\$123,000	\$188,000	\$220,000	18.8%	1.2%
Computer Hardware Engineers	\$120,300	\$130,000	\$200,000	\$233,000	2.7%	0.2%
Electrical Engineers	\$102,600	\$111,000	\$170,000	\$199,000	6.4%	0.4%
Electronics Engineers, Except Computer	\$116,300	\$126,000	\$193,000	\$225,000	2.9%	0.2%
Environmental Engineers	\$104,300	\$113,000	\$173,000	\$202,000	2.2%	0.1%
Industrial Engineers	\$116,300	\$126,000	\$193,000	\$225,000	4.2%	0.3%
Mechanical Engineers	\$104,600	\$113,000	\$173,000	\$202,000	9.3%	0.6%
Engineers, All Other	\$124,000	\$134,000	\$206,000	\$240,000	4.4%	0.3%
Architectural and Civil Drafters	\$66,400	\$75,000	\$130,000	\$159,000	8.1%	0.5%
Civil Engineering Technologists and Technicians	\$71,600	\$81,000	\$140,000	\$171,000	3.7%	0.2%
Electrical and Electronic Engineering Technicians	\$65,400	\$74,000	\$128,000	\$156,000	2.9%	0.2%
Surveying and Mapping Technicians	\$79,500	\$90,000	\$155,000	\$190,000	3.8%	0.2%
Calibration and Engineering Technicians	\$75,000	\$85,000	\$146,000	\$179,000	2.5%	0.2%
Other Architecture and Engineering Occupations	<u>\$101,000</u>	<u>\$109,000</u>	<u>\$168,000</u>	<u>\$195,000</u>	<u>14.3%</u>	<u>0.9%</u>
Weighted Mean Annual Wage	\$101,000	\$110,000	\$172,000	\$202,000	100.0%	6.3%
<i>Legal Occupations</i>						
Lawyers	\$138,800	\$145,000	\$210,000	\$242,000	59.6%	1.2%
Paralegals and Legal Assistants	\$61,600	\$70,000	\$120,000	\$147,000	33.4%	0.7%
Title Examiners, Abstractors, and Searchers	\$53,500	\$69,000	\$112,000	\$149,000	4.7%	0.1%
Other Legal Occupations	<u>\$108,300</u>	<u>\$117,000</u>	<u>\$180,000</u>	<u>\$210,000</u>	<u>2.4%</u>	<u>0.0%</u>
Weighted Mean Annual Wage	\$108,300	\$116,000	\$175,000	\$205,000	100.0%	2.1%
<i>Arts, Design, Entertainment, Sports, and Media Occupations</i>						
Art Directors	\$29,100	\$40,000	\$76,000	\$118,000	3.7%	0.1%
Special Effects Artists and Animators	\$80,300	\$88,000	\$138,000	\$164,000	4.2%	0.1%
Commercial and Industrial Designers	\$77,000	\$87,000	\$150,000	\$184,000	2.2%	0.0%
Graphic Designers	\$58,000	\$74,000	\$121,000	\$161,000	16.8%	0.4%
Interior Designers	\$68,600	\$78,000	\$134,000	\$164,000	9.3%	0.2%
Merchandise Displayers and Window Trimmers	\$34,300	\$43,000	\$87,000	\$127,000	4.3%	0.1%
Producers and Directors	\$29,100	\$40,000	\$76,000	\$118,000	3.5%	0.1%
Coaches and Scouts	\$45,000	\$57,000	\$101,000	\$132,000	2.5%	0.1%
Public Relations Specialists	\$65,500	\$74,000	\$128,000	\$157,000	19.2%	0.4%
Editors	\$81,500	\$89,000	\$141,000	\$167,000	6.3%	0.1%
Technical Writers	\$86,500	\$95,000	\$149,000	\$177,000	5.6%	0.1%
Writers and Authors	\$29,100	\$40,000	\$76,000	\$118,000	3.6%	0.1%
Interpreters and Translators	\$63,400	\$72,000	\$124,000	\$152,000	3.7%	0.1%
Photographers	\$50,900	\$65,000	\$106,000	\$141,000	4.3%	0.1%
Other Arts, Design, Sports, and Media Occupations	<u>\$60,600</u>	<u>\$69,000</u>	<u>\$118,000</u>	<u>\$145,000</u>	<u>10.6%</u>	<u>0.2%</u>
Weighted Mean Annual Wage	\$60,600	\$71,000	\$120,000	\$153,000	100.0%	2.3%

APPENDIX B TABLE 2
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
OFFICE WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation ¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total Office Workers
	One Worker	Two Workers	Three+ Workers			
<i>Healthcare Practitioners and Technical Occupations</i>						
Dentists, General	\$127,900	\$134,000	\$194,000	\$223,000	5.6%	0.5%
Physician Assistants	\$124,900	\$135,000	\$207,000	\$242,000	3.4%	0.3%
Physical Therapists	\$102,900	\$111,000	\$171,000	\$199,000	4.3%	0.4%
Veterinarians	\$164,700	\$174,000	\$225,000	\$246,000	2.2%	0.2%
Registered Nurses	\$111,300	\$120,000	\$185,000	\$215,000	12.1%	1.1%
Nurse Practitioners	\$141,300	\$148,000	\$214,000	\$246,000	5.0%	0.5%
Family Medicine Physicians	\$219,600	\$231,000	\$300,000	\$329,000	3.6%	0.3%
Physicians and Ophthalmologists, Except Pediatric	\$194,600	\$205,000	\$265,000	\$291,000	9.4%	0.8%
Dental Hygienists	\$143,200	\$150,000	\$217,000	\$249,000	11.6%	1.0%
Clinical Laboratory Technologists and Technicians	\$73,300	\$83,000	\$143,000	\$175,000	2.1%	0.2%
Radiologic Technologists and Technicians	\$90,800	\$99,000	\$157,000	\$186,000	2.1%	0.2%
Other Healthcare Practitioners and Technical Occupations	\$140,500	\$147,000	\$213,000	\$245,000	38.6%	3.5%
Weighted Mean Annual Wage	\$140,500	\$148,000	\$213,000	\$243,000	100.0%	9.0%
<i>Healthcare Support Occupations</i>						
Home Health and Personal Care Aides	\$30,000	\$38,000	\$76,000	\$111,000	2.3%	0.1%
Nursing Assistants	\$38,300	\$48,000	\$97,000	\$142,000	2.4%	0.1%
Physical Therapist Assistants	\$70,300	\$80,000	\$137,000	\$168,000	3.9%	0.2%
Physical Therapist Aides	\$29,900	\$41,000	\$78,000	\$121,000	2.6%	0.1%
Massage Therapists	\$58,100	\$74,000	\$121,000	\$161,000	2.6%	0.1%
Dental Assistants	\$50,700	\$65,000	\$106,000	\$141,000	31.9%	1.6%
Medical Assistants	\$37,800	\$47,000	\$96,000	\$140,000	41.0%	2.1%
Medical Transcriptionists	\$42,000	\$53,000	\$95,000	\$123,000	2.1%	0.1%
Veterinary Assistants and Laboratory Animal Caretakers	\$37,600	\$47,000	\$96,000	\$140,000	5.4%	0.3%
Other Healthcare Support Occupations	\$43,800	\$55,000	\$99,000	\$128,000	5.6%	0.3%
Weighted Mean Annual Wage	\$43,800	\$55,000	\$101,000	\$140,000	100.0%	5.0%
<i>Sales and Related Occupations</i>						
First-Line Supervisors of Non-Retail Sales Workers	\$68,800	\$78,000	\$134,000	\$165,000	4.1%	0.3%
Counter and Rental Clerks	\$36,000	\$45,000	\$91,000	\$134,000	8.4%	0.5%
Retail Salespersons	\$32,900	\$41,000	\$84,000	\$122,000	2.3%	0.1%
Advertising Sales Agents	\$62,100	\$70,000	\$121,000	\$149,000	3.7%	0.2%
Insurance Sales Agents	\$77,800	\$88,000	\$152,000	\$186,000	12.3%	0.8%
Securities, Commodities, and Financial Services Sales	\$64,000	\$73,000	\$125,000	\$153,000	11.5%	0.7%
Sales Representatives	\$63,000	\$71,000	\$123,000	\$151,000	22.8%	1.4%
Sales Reps., Wholesale, Manuf., Technical, Scientific	\$93,700	\$102,000	\$162,000	\$192,000	6.9%	0.4%
Sales Reps., Wholesale & Manuf., Excl. Tech. & Scientific	\$75,500	\$86,000	\$147,000	\$181,000	4.9%	0.3%
Other Sales and Related Occupations	\$65,500	\$74,000	\$128,000	\$157,000	23.2%	1.4%
Weighted Mean Annual Wage	\$65,500	\$74,000	\$129,000	\$160,000	100.0%	6.2%

APPENDIX B TABLE 2
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
OFFICE WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation ¹	Household Income Estimate ⁴ One Worker	Two Workers	Three+ Workers	% of Total Occupation Group ²	% of Total Office Workers
<i>Office and Administrative Support Occupations</i>						
Supervisors of Office and Admin. Support Workers	\$65,500	\$74,000	\$128,000	\$157,000	8.2%	1.8%
Billing and Posting Clerks	\$45,400	\$57,000	\$102,000	\$133,000	4.4%	1.0%
Bookkeeping, Accounting, and Auditing Clerks	\$50,800	\$65,000	\$106,000	\$141,000	8.4%	1.9%
Tellers	\$36,900	\$46,000	\$94,000	\$137,000	4.0%	0.9%
Customer Service Representatives	\$41,300	\$52,000	\$93,000	\$121,000	15.0%	3.3%
Receptionists and Information Clerks	\$34,800	\$44,000	\$88,000	\$129,000	10.4%	2.3%
Executive Secretaries and Executive Admin. Assistants	\$72,100	\$82,000	\$141,000	\$172,000	3.3%	0.7%
Medical Secretaries and Administrative Assistants	\$43,700	\$55,000	\$99,000	\$128,000	6.6%	1.5%
Secretaries and Administrative Assistants	\$46,800	\$59,000	\$106,000	\$137,000	9.3%	2.1%
Office Clerks, General	\$40,400	\$51,000	\$91,000	\$119,000	12.9%	2.9%
Other Office and Administrative Support Occupations	<u>\$45,800</u>	<u>\$58,000</u>	<u>\$103,000</u>	<u>\$134,000</u>	<u>17.4%</u>	<u>3.9%</u>
Weighted Mean Annual Wage	\$45,800	\$57,000	\$102,000	\$133,000	100.0%	22.3%
<i>Installation, Maintenance, and Repair Occupations</i>						
Supervisors of Mechanics, Installers, and Repairers	\$78,400	\$89,000	\$153,000	\$187,000	9.0%	0.2%
Telecommunications Equipment Installers and Repairers	\$29,100	\$40,000	\$76,000	\$118,000	7.3%	0.2%
Telecommunications Line Installers and Repairers	\$62,700	\$71,000	\$122,000	\$150,000	3.8%	0.1%
Maintenance and Repair Workers, General	\$45,600	\$58,000	\$103,000	\$134,000	68.0%	1.7%
Other Installation, Maintenance, and Repair Occupations	<u>\$48,300</u>	<u>\$61,000</u>	<u>\$109,000</u>	<u>\$142,000</u>	<u>11.9%</u>	<u>0.3%</u>
Weighted Mean Annual Wage	\$48,300	\$60,000	\$107,000	\$139,000	100.0%	2.5%

90.6%

¹ The methodology utilized by the California Employment Development Department (EDD) assumes hourly paid employees are employed full-time. EDD data is adjusted by KMA to reflect the State minimum wage. Annual compensation is calculated by EDD by multiplying hourly wages by 40 hours per work week by 52 weeks.

² Occupation percentages are based on the 2019 National Industry - Specific Occupational Employment survey compiled by the Bureau of Labor Statistics. Wages are based on Occupational Employment Survey data applicable to Santa Barbara County as of 2019 and are adjusted by EDD to the first quarter of 2020.

³ Including occupations representing 2% or more of the major occupation group.

⁴ Household income estimated based average worker compensation and ratios between employee income and household income identified in Table 3-7.

APPENDIX B TABLE 3
ESTIMATED WORKER OCCUPATION DISTRIBUTION, 2019
MEDICAL WORKERS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Worker Occupation Distribution Medical	
Major Occupations (2% or more)	
Management Occupations	3.9%
Business and Financial Operations Occupations	2.2%
Community and Social Service Occupations	3.8%
Healthcare Practitioners and Technical Occupations	49.2%
Healthcare Support Occupations	16.7%
Food Preparation and Serving Related Occupations	2.9%
Building and Grounds Cleaning and Maintenance Occupations	3.0%
Office and Administrative Support Occupations	11.9%
All Other Worker Occupations - Medical	<u>6.5%</u>
TOTAL	100.0%

APPENDIX B TABLE 4
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
MEDICAL WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation¹	Household Income Estimate ⁴ One Worker	Two Workers	Three+ Workers	% of Total Occupation Group ²	% of Total Medical Workers
Page 1 of 3						
<i>Management Occupations</i>						
Chief Executives	\$195,300	\$206,000	\$266,000	\$292,000	2.2%	0.1%
General and Operations Managers	\$125,000	\$131,000	\$190,000	\$218,000	9.1%	0.4%
Administrative Services and Facilities Managers	\$106,000	\$115,000	\$176,000	\$205,000	6.5%	0.3%
Computer and Information Systems Managers	\$186,600	\$197,000	\$255,000	\$279,000	3.3%	0.1%
Financial Managers	\$143,800	\$150,000	\$218,000	\$251,000	4.1%	0.2%
Human Resources Managers	\$132,600	\$139,000	\$201,000	\$231,000	2.0%	0.1%
Medical and Health Services Managers	\$124,700	\$135,000	\$207,000	\$241,000	57.0%	2.2%
Social and Community Service Managers	\$93,900	\$103,000	\$162,000	\$192,000	3.6%	0.1%
Personal Service, Enter. and Recreation Managers	\$133,600	\$140,000	\$203,000	\$233,000	4.7%	0.2%
Other Management Occupations	<u>\$127,600</u>	<u>\$133,000</u>	<u>\$193,000</u>	<u>\$222,000</u>	<u>7.4%</u>	<u>0.3%</u>
Weighted Mean Annual Wage	\$127,600	\$137,000	\$204,000	\$236,000	100.0%	3.9%
<i>Business and Financial Operations Occupations</i>						
Buyers and Purchasing Agents	\$73,900	\$84,000	\$144,000	\$177,000	5.9%	0.1%
Compliance Officers	\$70,200	\$80,000	\$137,000	\$168,000	6.3%	0.1%
Human Resources Specialists	\$72,700	\$83,000	\$142,000	\$174,000	16.5%	0.4%
Management Analysts	\$83,000	\$91,000	\$143,000	\$170,000	8.1%	0.2%
Fundraisers	\$66,400	\$75,000	\$130,000	\$159,000	2.1%	0.0%
Compensation, Benefits, and Job Analysis Specialists	\$68,700	\$78,000	\$134,000	\$164,000	2.3%	0.0%
Training and Development Specialists	\$71,600	\$81,000	\$140,000	\$171,000	9.3%	0.2%
Market Research Analysts and Marketing Specialists	\$68,000	\$77,000	\$133,000	\$163,000	5.7%	0.1%
Project Management and Business Operations Specialists	\$71,300	\$81,000	\$139,000	\$171,000	20.3%	0.4%
Accountants and Auditors	\$85,400	\$93,000	\$147,000	\$175,000	11.6%	0.3%
Financial, Investment, and Risk Specialists	\$93,900	\$103,000	\$162,000	\$192,000	6.2%	0.1%
Other Business and Financial Operations Occupations	<u>\$75,500</u>	<u>\$86,000</u>	<u>\$147,000</u>	<u>\$181,000</u>	<u>5.7%</u>	<u>0.1%</u>
Weighted Mean Annual Wage	\$75,500	\$85,000	\$142,000	\$173,000	100.0%	2.2%
<i>Community and Social Service Occupations</i>						
Marriage and Family Therapists	\$70,400	\$80,000	\$137,000	\$168,000	2.9%	0.1%
Substance abuse, behavioral, & mental health counselors	\$60,700	\$69,000	\$118,000	\$145,000	28.2%	1.1%
Child, Family, and School Social Workers	\$58,300	\$75,000	\$122,000	\$162,000	4.1%	0.2%
Healthcare Social Workers	\$63,900	\$73,000	\$125,000	\$153,000	22.8%	0.9%
Mental Health and Substance Abuse Social Workers	\$80,600	\$88,000	\$139,000	\$165,000	11.9%	0.5%
Health Education Specialists	\$79,000	\$90,000	\$154,000	\$189,000	6.0%	0.2%
Social and Human Service Assistants	\$46,400	\$59,000	\$105,000	\$136,000	11.6%	0.4%
Community Health Workers	\$60,500	\$69,000	\$118,000	\$145,000	3.6%	0.1%
Clergy	\$78,400	\$89,000	\$153,000	\$187,000	3.1%	0.1%
Other Community and Social Service Occupations	<u>\$64,200</u>	<u>\$73,000</u>	<u>\$125,000</u>	<u>\$154,000</u>	<u>5.8%</u>	<u>0.2%</u>
Weighted Mean Annual Wage	\$64,200	\$74,000	\$125,000	\$154,000	100.0%	3.8%

APPENDIX B TABLE 4
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
MEDICAL WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total Medical Workers
		One Worker	Two Workers	Three+ Workers		
<i>Healthcare Practitioners and Technical Occupations</i>						
Pharmacists	\$161,200	\$170,000	\$220,000	\$241,000	2.1%	1.0%
Respiratory Therapists	\$95,300	\$104,000	\$164,000	\$195,000	2.6%	1.3%
Registered Nurses	\$111,300	\$120,000	\$185,000	\$215,000	48.4%	23.8%
Physicians and Ophthalmologists, Except Pediatric	\$194,600	\$205,000	\$265,000	\$291,000	3.2%	1.6%
Clinical Laboratory Technologists and Technicians	\$73,300	\$83,000	\$143,000	\$175,000	6.0%	3.0%
Radiologic Technologists and Technicians	\$90,800	\$99,000	\$157,000	\$186,000	3.7%	1.8%
Emergency Medical Technicians and Paramedics	\$38,400	\$48,000	\$98,000	\$143,000	3.0%	1.5%
Surgical Technologists	\$67,800	\$77,000	\$132,000	\$162,000	2.2%	1.1%
Licensed Practical and Licensed Vocational Nurses	\$62,200	\$71,000	\$121,000	\$149,000	6.9%	3.4%
Medical Dosimetrists, Records, Health Technicians	\$53,400	\$68,000	\$111,000	\$148,000	4.5%	2.2%
Other Healthcare Practitioners and Technical Occupations	<u>\$100,500</u>	<u>\$109,000</u>	<u>\$167,000</u>	<u>\$194,000</u>	<u>17.4%</u>	<u>8.6%</u>
Weighted Mean Annual Wage	\$100,500	\$110,000	\$169,000	\$199,000	100.0%	49.2%
<i>Healthcare Support Occupations</i>						
Home Health and Personal Care Aides	\$30,000	\$38,000	\$76,000	\$111,000	5.5%	0.9%
Nursing Assistants	\$38,300	\$48,000	\$97,000	\$142,000	58.9%	9.8%
Orderlies	\$40,200	\$51,000	\$91,000	\$118,000	2.8%	0.5%
Medical Assistants	\$37,800	\$47,000	\$96,000	\$140,000	13.1%	2.2%
Medical Equipment Preparers	\$44,600	\$56,000	\$101,000	\$131,000	3.2%	0.5%
Phlebotomists	\$49,500	\$62,000	\$112,000	\$145,000	7.8%	1.3%
Healthcare Support Workers, All Other	\$47,200	\$60,000	\$106,000	\$138,000	2.5%	0.4%
Other Healthcare Support Occupations	<u>\$39,200</u>	<u>\$49,000</u>	<u>\$100,000</u>	<u>\$146,000</u>	<u>6.2%</u>	<u>1.0%</u>
Weighted Mean Annual Wage	\$39,200	\$49,000	\$97,000	\$139,000	100.0%	16.7%
<i>Food Preparation and Serving Related Occupations</i>						
Supervisors of Food Preparation and Serving Workers	\$39,200	\$49,000	\$100,000	\$146,000	6.2%	0.2%
Cooks, Institution and Cafeteria	\$41,700	\$53,000	\$94,000	\$122,000	27.9%	0.8%
Food Preparation Workers	\$30,800	\$39,000	\$78,000	\$114,000	11.1%	0.3%
Fast Food and Counter Workers	\$29,100	\$40,000	\$76,000	\$118,000	11.8%	0.3%
Food Servers, Nonrestaurant	\$30,700	\$39,000	\$78,000	\$114,000	35.3%	1.0%
Dining Room and Cafeteria Attendants	\$29,100	\$40,000	\$76,000	\$118,000	2.1%	0.1%
Other Food Preparation and Serving Related Occupations	<u>\$34,300</u>	<u>\$43,000</u>	<u>\$87,000</u>	<u>\$127,000</u>	<u>5.6%</u>	<u>0.2%</u>
Weighted Mean Annual Wage	\$34,300	\$44,000	\$84,000	\$120,000	100.0%	2.9%

APPENDIX B TABLE 4
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
MEDICAL WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation ¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total Medical Workers
		One Worker	Two Workers	Three+ Workers		
<i>Building and Grounds Cleaning and Maintenance Occupations</i>						
Supervisors of Housekeeping & Janitorial Workers	\$45,500	\$57,000	\$103,000	\$133,000	4.5%	0.1%
Janitors and Cleaners	\$34,500	\$43,000	\$88,000	\$128,000	32.6%	1.0%
Maids and Housekeeping Cleaners	\$31,500	\$40,000	\$80,000	\$117,000	61.5%	1.8%
Other Building and Grounds Cleaning and Maint. Occupations	<u>\$33,100</u>	<u>\$42,000</u>	<u>\$84,000</u>	<u>\$123,000</u>	<u>1.5%</u>	<u>0.0%</u>
Weighted Mean Annual Wage	\$33,100	\$42,000	\$84,000	\$121,000	100.0%	3.0%
<i>Office and Administrative Support Occupations</i>						
Supervisors of Office and Admin. Support Workers	\$65,500	\$74,000	\$128,000	\$157,000	7.4%	0.9%
Billing and Posting Clerks	\$45,400	\$57,000	\$102,000	\$133,000	6.7%	0.8%
Bookkeeping, Accounting, and Auditing Clerks	\$50,800	\$65,000	\$106,000	\$141,000	3.3%	0.4%
Customer Service Representatives	\$41,300	\$52,000	\$93,000	\$121,000	10.4%	1.2%
Interviewers, Except Eligibility and Loan	\$48,700	\$61,000	\$110,000	\$143,000	8.2%	1.0%
Receptionists and Information Clerks	\$34,800	\$44,000	\$88,000	\$129,000	8.7%	1.0%
Executive Secretaries and Executive Admin. Assistants	\$72,100	\$82,000	\$141,000	\$172,000	2.7%	0.3%
Medical Secretaries and Administrative Assistants	\$43,700	\$55,000	\$99,000	\$128,000	21.5%	2.6%
Secretaries and Administrative Assistants	\$46,800	\$59,000	\$106,000	\$137,000	7.8%	0.9%
Office Clerks, General	\$40,400	\$51,000	\$91,000	\$119,000	9.5%	1.1%
Other Office and Administrative Support Occupations	<u>\$46,000</u>	<u>\$58,000</u>	<u>\$104,000</u>	<u>\$135,000</u>	<u>13.8%</u>	<u>1.6%</u>
Weighted Mean Annual Wage	\$46,000	\$57,000	\$102,000	\$133,000	100.0%	11.9%
						93.5%

¹ The methodology utilized by the California Employment Development Department (EDD) assumes hourly paid employees are employed full-time. EDD data is adjusted by KMA to reflect the State minimum wage. Annual compensation is calculated by EDD by multiplying hourly wages by 40 hours per work week by 52 weeks.

² Occupation percentages are based on the 2019 National Industry - Specific Occupational Employment survey compiled by the Bureau of Labor Statistics. Wages are based on Occupational Employment Survey data applicable to Santa Barbara County as of 2019 and are adjusted by EDD to the first quarter of 2020.

³ Including occupations representing 2% or more of the major occupation group.

⁴ Household income estimated based average worker compensation and ratios between employee income and household income identified in Table 3-7.

APPENDIX B TABLE 5
ESTIMATED WORKER OCCUPATION DISTRIBUTION, 2019
RETAIL WORKERS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

	Worker Occupation Distribution Retail
Major Occupations (2% or more)	
Management Occupations	2.6%
Food Preparation and Serving Related Occupations	45.8%
Personal Care and Service Occupations	2.6%
Sales and Related Occupations	27.1%
Office and Administrative Support Occupations	4.5%
Installation, Maintenance, and Repair Occupations	2.2%
Production Occupations	2.3%
Transportation and Material Moving Occupations	8.8%
All Other Worker Occupations - Retail	<u>4.0%</u>
TOTAL	100.0%

APPENDIX B TABLE 6
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
RETAIL WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation ¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total Retail Workers
		One Worker	Two Workers	Three+ Workers		
Page 1 of 2						
<i>Management Occupations</i>						
General and Operations Managers	\$125,000	\$131,000	\$190,000	\$218,000	53.3%	1.4%
Sales Managers	\$132,500	\$139,000	\$201,000	\$231,000	8.3%	0.2%
Food Service Managers	\$64,200	\$73,000	\$125,000	\$154,000	29.8%	0.8%
Other Management Occupations	<u>\$105,900</u>	<u>\$115,000</u>	<u>\$176,000</u>	<u>\$205,000</u>	<u>8.6%</u>	<u>0.2%</u>
Weighted Mean Annual Wage	\$105,900	\$113,000	\$170,000	\$199,000	100.0%	2.6%
<i>Food Preparation and Serving Related Occupations</i>						
Supervisors of Food Preparation and Serving Workers	\$39,200	\$49,000	\$100,000	\$146,000	7.7%	3.5%
Cooks, Fast Food	\$29,100	\$40,000	\$76,000	\$118,000	4.7%	2.2%
Cooks, Restaurant	\$32,900	\$41,000	\$84,000	\$122,000	11.3%	5.2%
Food Preparation Workers	\$30,800	\$39,000	\$78,000	\$114,000	6.2%	2.8%
Bartenders	\$33,800	\$42,000	\$86,000	\$126,000	4.1%	1.9%
Fast Food and Counter Workers	\$29,100	\$40,000	\$76,000	\$118,000	32.0%	14.7%
Waiters and Waitresses	\$34,800	\$44,000	\$88,000	\$129,000	20.3%	9.3%
Dining Room and Cafeteria Attendants	\$29,100	\$40,000	\$76,000	\$118,000	3.0%	1.4%
Dishwashers	\$29,100	\$40,000	\$76,000	\$118,000	3.8%	1.8%
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	\$29,100	\$40,000	\$76,000	\$118,000	3.5%	1.6%
Other Food Preparation and Serving Related Occupations	<u>\$31,900</u>	<u>\$40,000</u>	<u>\$81,000</u>	<u>\$119,000</u>	<u>3.3%</u>	<u>1.5%</u>
Weighted Mean Annual Wage	\$31,900	\$42,000	\$82,000	\$123,000	100.0%	45.8%
<i>Personal Care and Service Occupations</i>						
Supervisors of Personal Service, Entert. & Rec. Workers	\$47,900	\$60,000	\$108,000	\$141,000	6.0%	0.2%
Animal Caretakers	\$36,000	\$45,000	\$91,000	\$134,000	20.5%	0.5%
Ushers, Lobby Attendants, and Ticket Takers	\$29,100	\$40,000	\$76,000	\$118,000	10.1%	0.3%
Hairdressers, Hairstylists, and Cosmetologists	\$39,100	\$49,000	\$99,000	\$145,000	35.7%	0.9%
Manicurists and Pedicurists	\$30,400	\$38,000	\$77,000	\$113,000	11.0%	0.3%
Skincare Specialists	\$56,600	\$73,000	\$118,000	\$157,000	4.5%	0.1%
Other Personal Care and Service Occupations	<u>\$37,600</u>	<u>\$47,000</u>	<u>\$96,000</u>	<u>\$140,000</u>	<u>12.2%</u>	<u>0.3%</u>
Weighted Mean Annual Wage	\$37,600	\$48,000	\$94,000	\$136,000	100.0%	2.6%
<i>Sales and Related Occupations</i>						
First-Line Supervisors of Retail Sales Workers	\$46,000	\$58,000	\$104,000	\$135,000	11.5%	3.1%
Cashiers	\$29,200	\$40,000	\$76,000	\$118,000	37.0%	10.0%
Counter and Rental Clerks	\$36,000	\$45,000	\$91,000	\$134,000	2.3%	0.6%
Retail Salespersons	\$32,900	\$41,000	\$84,000	\$122,000	43.6%	11.8%
Other Sales and Related Occupations	<u>\$33,100</u>	<u>\$42,000</u>	<u>\$84,000</u>	<u>\$123,000</u>	<u>5.6%</u>	<u>1.5%</u>
Weighted Mean Annual Wage	\$33,100	\$43,000	\$84,000	\$122,000	100.0%	27.1%

APPENDIX B TABLE 6
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
RETAIL WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation ¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total Retail Workers
		One Worker	Two Workers	Three+ Workers		
<i>Office and Administrative Support Occupations</i>						
Supervisors of Office and Admin. Support Workers	\$65,500	\$74,000	\$128,000	\$157,000	9.8%	0.4%
Bookkeeping, Accounting, and Auditing Clerks	\$50,800	\$65,000	\$106,000	\$141,000	11.5%	0.5%
Customer Service Representatives	\$41,300	\$52,000	\$93,000	\$121,000	28.2%	1.3%
Receptionists and Information Clerks	\$34,800	\$44,000	\$88,000	\$129,000	7.5%	0.3%
Shipping, Receiving, and Inventory Clerks	\$40,400	\$51,000	\$91,000	\$119,000	7.7%	0.3%
Secretaries and Administrative Assistants	\$46,800	\$59,000	\$106,000	\$137,000	6.2%	0.3%
Office Clerks, General	\$40,400	\$51,000	\$91,000	\$119,000	16.6%	0.7%
Other Office and Administrative Support Occupations	<u>\$44,900</u>	<u>\$57,000</u>	<u>\$101,000</u>	<u>\$132,000</u>	<u>12.6%</u>	<u>0.6%</u>
Weighted Mean Annual Wage	\$44,900	\$56,000	\$99,000	\$129,000	100.0%	4.5%
<i>Installation, Maintenance, and Repair Occupations</i>						
Supervisors of Mechanics, Installers, and Repairers	\$78,400	\$89,000	\$153,000	\$187,000	7.5%	0.2%
Computer, Automated Teller, and Office Machine Repairers	\$43,000	\$54,000	\$97,000	\$126,000	3.5%	0.1%
Automotive Body and Related Repairers	\$62,500	\$71,000	\$122,000	\$149,000	3.5%	0.1%
Automotive Service Technicians and Mechanics	\$45,600	\$58,000	\$103,000	\$134,000	38.0%	0.8%
Tire Repairers and Changers	\$35,000	\$44,000	\$89,000	\$130,000	9.3%	0.2%
Maintenance and Repair Workers, General	\$45,600	\$58,000	\$103,000	\$134,000	10.5%	0.2%
Installation, Maintenance, and Repair Workers, All Other	\$43,500	\$55,000	\$98,000	\$128,000	3.6%	0.1%
Other Installation, Maintenance, and Repair Occupations	<u>\$48,100</u>	<u>\$61,000</u>	<u>\$108,000</u>	<u>\$141,000</u>	<u>24.1%</u>	<u>0.5%</u>
Weighted Mean Annual Wage	\$48,100	\$60,000	\$107,000	\$139,000	100.0%	2.2%
<i>Production Occupations</i>						
Supervisors of Production and Operating Workers	\$72,700	\$83,000	\$142,000	\$174,000	6.8%	0.2%
Miscellaneous Assemblers and Fabricators	\$36,800	\$46,000	\$94,000	\$137,000	2.8%	0.1%
Bakers	\$37,200	\$47,000	\$95,000	\$138,000	17.0%	0.4%
Butchers and Meat Cutters	\$36,100	\$45,000	\$92,000	\$134,000	20.4%	0.5%
Meat, Poultry, and Fish Cutters and Trimmers	\$31,300	\$39,000	\$80,000	\$116,000	3.4%	0.1%
Food Batchmakers	\$29,100	\$40,000	\$76,000	\$118,000	2.1%	0.0%
Laundry and Dry-Cleaning Workers	\$30,300	\$38,000	\$77,000	\$113,000	23.1%	0.5%
Pressers, Textile, Garment, and Related Materials	\$29,100	\$40,000	\$76,000	\$118,000	7.0%	0.2%
Tailors, Dressmakers, and Custom Sewers	\$46,800	\$59,000	\$106,000	\$137,000	2.3%	0.1%
Other Production Occupations	<u>\$37,000</u>	<u>\$46,000</u>	<u>\$94,000</u>	<u>\$137,000</u>	<u>14.9%</u>	<u>0.3%</u>
Weighted Mean Annual Wage	\$37,000	\$46,000	\$91,000	\$131,000	100.0%	2.3%
<i>Transportation and Material Moving Occupations</i>						
Supervisors of Transportation and Material-Moving Workers	\$71,300	\$81,000	\$139,000	\$171,000	2.5%	0.2%
Driver/Sales Workers	\$32,800	\$41,000	\$83,000	\$122,000	12.4%	1.1%
Light Truck Drivers	\$43,000	\$54,000	\$97,000	\$126,000	9.5%	0.8%
Parking Attendants	\$29,500	\$40,000	\$77,000	\$119,000	4.8%	0.4%
Cleaners of Vehicles and Equipment	\$30,200	\$38,000	\$77,000	\$112,000	3.5%	0.3%
Laborers and Freight, Stock, and Material Movers, Hand	\$36,700	\$46,000	\$93,000	\$136,000	9.1%	0.8%
Packers and Packagers, Hand	\$29,100	\$40,000	\$76,000	\$118,000	6.0%	0.5%
Stockers and Order Fillers	\$31,900	\$40,000	\$81,000	\$119,000	45.8%	4.0%
Other Transportation and Material Moving Occupations	<u>\$34,300</u>	<u>\$43,000</u>	<u>\$87,000</u>	<u>\$127,000</u>	<u>6.5%</u>	<u>0.6%</u>
Weighted Mean Annual Wage	\$34,300	\$43,000	\$85,000	\$123,000	100.0%	8.8%
						96.0%

¹ The methodology utilized by the California Employment Development Department (EDD) assumes hourly paid employees are employed full-time. EDD data is adjusted by KMA to reflect the State minimum wage. Annual compensation is calculated by EDD by multiplying hourly wages by 40 hours per work week by 52 weeks.

² Occupation percentages are based on the 2019 National Industry - Specific Occupational Employment survey compiled by the Bureau of Labor Statistics. Wages are based on Occupational Employment Survey data applicable to Santa Barbara County as of 2019 and are adjusted by EDD to the first quarter of 2020.

³ Including occupations representing 2% or more of the major occupation group.

⁴ Household income estimated based average worker compensation and ratios between employee income and household income identified in Table 3-7.

APPENDIX B TABLE 7
ESTIMATED WORKER OCCUPATION DISTRIBUTION, 2019
HOTEL WORKERS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

	<div>Worker Occupation Distribution</div> <div>Hotel</div>
Major Occupations (2% or more)	
Management Occupations	4.5%
Food Preparation and Serving Related Occupations	25.0%
Building and Grounds Cleaning and Maintenance Occupations	30.7%
Personal Care and Service Occupations	4.1%
Sales and Related Occupations	2.5%
Office and Administrative Support Occupations	19.7%
Installation, Maintenance, and Repair Occupations	5.6%
Production Occupations	2.5%
All Other Worker Occupations - Hotel	<u>5.4%</u>
TOTAL	100.0%

APPENDIX B TABLE 8
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
HOTEL WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation ¹	Household Income Estimate ⁴ One Worker	Two Workers	Three+ Workers	% of Total Occupation Group ²	% of Total Hotel Workers
Page 1 of 2						
<i>Management Occupations</i>						
General and Operations Managers	\$125,000	\$131,000	\$190,000	\$218,000	21.1%	1.0%
Sales Managers	\$132,500	\$139,000	\$201,000	\$231,000	7.7%	0.3%
Administrative Services and Facilities Managers	\$106,000	\$115,000	\$176,000	\$205,000	4.4%	0.2%
Financial Managers	\$143,800	\$150,000	\$218,000	\$251,000	4.5%	0.2%
Human Resources Managers	\$132,600	\$139,000	\$201,000	\$231,000	2.3%	0.1%
Food Service Managers	\$64,200	\$73,000	\$125,000	\$154,000	9.6%	0.4%
Lodging Managers	\$89,700	\$98,000	\$155,000	\$183,000	43.1%	2.0%
Personal Service, Enter. and Recreation Managers	\$133,600	\$140,000	\$203,000	\$233,000	3.4%	0.2%
Other Management Occupations	<u>\$104,200</u>	<u>\$113,000</u>	<u>\$173,000</u>	<u>\$202,000</u>	<u>3.9%</u>	<u>0.2%</u>
Weighted Mean Annual Wage	\$104,200	\$112,000	\$170,000	\$199,000	100.0%	4.5%
<i>Food Preparation and Serving Related Occupations</i>						
Chefs and Head Cooks	\$60,900	\$69,000	\$119,000	\$146,000	2.8%	0.7%
Supervisors of Food Preparation and Serving Workers	\$39,200	\$49,000	\$100,000	\$146,000	6.0%	1.5%
Cooks, Restaurant	\$32,900	\$41,000	\$84,000	\$122,000	16.1%	4.0%
Food Preparation Workers	\$30,800	\$39,000	\$78,000	\$114,000	2.1%	0.5%
Bartenders	\$33,800	\$42,000	\$86,000	\$126,000	7.8%	1.9%
Fast Food and Counter Workers	\$29,100	\$40,000	\$76,000	\$118,000	4.6%	1.2%
Waiters and Waitresses	\$34,800	\$44,000	\$88,000	\$129,000	30.6%	7.6%
Food Servers, Nonrestaurant	\$30,700	\$39,000	\$78,000	\$114,000	6.2%	1.6%
Dining Room and Cafeteria Attendants	\$29,100	\$40,000	\$76,000	\$118,000	12.0%	3.0%
Dishwashers	\$29,100	\$40,000	\$76,000	\$118,000	6.1%	1.5%
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	\$29,100	\$40,000	\$76,000	\$118,000	3.6%	0.9%
Other Food Preparation and Serving Related Occupations	<u>\$33,600</u>	<u>\$42,000</u>	<u>\$85,000</u>	<u>\$125,000</u>	<u>2.2%</u>	<u>0.6%</u>
Weighted Mean Annual Wage	\$33,600	\$43,000	\$85,000	\$125,000	100.0%	25.0%
<i>Building and Grounds Cleaning and Maintenance Occupations</i>						
Supervisors of Housekeeping & Janitorial Workers	\$45,500	\$57,000	\$103,000	\$133,000	6.3%	1.9%
Janitors and Cleaners	\$34,500	\$43,000	\$88,000	\$128,000	5.5%	1.7%
Maids and Housekeeping Cleaners	\$31,500	\$40,000	\$80,000	\$117,000	85.8%	26.3%
Other Building and Grounds Cleaning and Maint. Occupations	<u>\$32,600</u>	<u>\$41,000</u>	<u>\$83,000</u>	<u>\$121,000</u>	<u>2.4%</u>	<u>0.8%</u>
Weighted Mean Annual Wage	\$32,600	\$41,000	\$82,000	\$119,000	100.0%	30.7%
<i>Personal Care and Service Occupations</i>						
Supervisors of Personal Service, Entert. & Rec. Workers	\$47,900	\$60,000	\$108,000	\$141,000	5.5%	0.2%
Amusement and Recreation Attendants	\$29,100	\$40,000	\$76,000	\$118,000	17.2%	0.7%
Locker Room, Coatroom, and Dressing Room Attendants	\$34,700	\$44,000	\$88,000	\$129,000	4.7%	0.2%
Skincare Specialists	\$56,600	\$73,000	\$118,000	\$157,000	3.4%	0.1%
Baggage Porters and Bellhops	\$33,600	\$42,000	\$85,000	\$125,000	29.0%	1.2%
Concierges	\$40,000	\$50,000	\$90,000	\$117,000	17.2%	0.7%
Exercise Trainers and Group Fitness Instructors	\$58,700	\$75,000	\$122,000	\$163,000	4.1%	0.2%
Recreation Workers	\$33,500	\$42,000	\$85,000	\$124,000	7.5%	0.3%
Other Personal Care and Service Occupations	<u>\$37,000</u>	<u>\$46,000</u>	<u>\$94,000</u>	<u>\$137,000</u>	<u>11.4%</u>	<u>0.5%</u>
Weighted Mean Annual Wage	\$37,000	\$47,000	\$89,000	\$127,000	100.0%	4.1%

APPENDIX B TABLE 8
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
HOTEL WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total Hotel Workers
		One Worker	Two Workers	Three+ Workers		
Page 2 of 2						
<i>Sales and Related Occupations</i>						
First-Line Supervisors of Retail Sales Workers	\$46,000	\$58,000	\$104,000	\$135,000	3.9%	0.1%
First-Line Supervisors of Non-Retail Sales Workers	\$68,800	\$78,000	\$134,000	\$165,000	3.7%	0.1%
Cashiers	\$29,200	\$40,000	\$76,000	\$118,000	17.7%	0.4%
Retail Salespersons	\$32,900	\$41,000	\$84,000	\$122,000	11.8%	0.3%
Sales Representatives	\$63,000	\$71,000	\$123,000	\$151,000	55.2%	1.4%
Sales Reps., Wholesale & Manuf., Excl. Tech. & Scientific	\$75,500	\$86,000	\$147,000	\$181,000	2.3%	0.1%
Other Sales and Related Occupations	<u>\$52,700</u>	<u>\$68,000</u>	<u>\$110,000</u>	<u>\$146,000</u>	<u>5.6%</u>	<u>0.1%</u>
Weighted Mean Annual Wage	\$52,700	\$62,000	\$110,000	\$142,000	100.0%	2.5%
<i>Office and Administrative Support Occupations</i>						
Supervisors of Office and Admin. Support Workers	\$65,500	\$74,000	\$128,000	\$157,000	9.5%	1.9%
Bookkeeping, Accounting, and Auditing Clerks	\$50,800	\$65,000	\$106,000	\$141,000	5.5%	1.1%
Hotel, Motel, and Resort Desk Clerks	\$30,600	\$38,000	\$78,000	\$114,000	72.8%	14.3%
Secretaries and Administrative Assistants	\$46,800	\$59,000	\$106,000	\$137,000	2.3%	0.4%
Other Office and Administrative Support Occupations	<u>\$35,900</u>	<u>\$45,000</u>	<u>\$91,000</u>	<u>\$133,000</u>	<u>9.9%</u>	<u>1.9%</u>
Weighted Mean Annual Wage	\$35,900	\$44,000	\$86,000	\$122,000	100.0%	19.7%
<i>Installation, Maintenance, and Repair Occupations</i>						
Supervisors of Mechanics, Installers, and Repairers	\$78,400	\$89,000	\$153,000	\$187,000	7.6%	0.4%
Maintenance and Repair Workers, General	\$45,600	\$58,000	\$103,000	\$134,000	89.5%	5.0%
Other Installation, Maintenance, and Repair Occupations	<u>\$48,200</u>	<u>\$61,000</u>	<u>\$109,000</u>	<u>\$141,000</u>	<u>2.8%</u>	<u>0.2%</u>
Weighted Mean Annual Wage	\$48,200	\$60,000	\$107,000	\$138,000	100.0%	5.6%
<i>Production Occupations</i>						
Supervisors of Production and Operating Workers	\$72,700	\$83,000	\$142,000	\$174,000	2.1%	0.1%
Bakers	\$37,200	\$47,000	\$95,000	\$138,000	6.2%	0.2%
Laundry and Dry-Cleaning Workers	\$30,300	\$38,000	\$77,000	\$113,000	85.9%	2.1%
Other Production Occupations	<u>\$31,700</u>	<u>\$40,000</u>	<u>\$81,000</u>	<u>\$118,000</u>	<u>5.8%</u>	<u>0.1%</u>
Weighted Mean Annual Wage	\$31,700	\$40,000	\$80,000	\$116,000	100.0%	2.5%
						94.6%

¹ The methodology utilized by the California Employment Development Department (EDD) assumes hourly paid employees are employed full-time. EDD data is adjusted by KMA to reflect the State minimum wage. Annual compensation is calculated by EDD by multiplying hourly wages by 40 hours per work week by 52 weeks.

² Occupation percentages are based on the 2019 National Industry - Specific Occupational Employment survey compiled by the Bureau of Labor Statistics. Wages are based on Occupational Employment Survey data applicable to Santa Barbara County as of 2019 and are adjusted by EDD to the first quarter of 2020.

³ Including occupations representing 2% or more of the major occupation group.

⁴ Household income estimated based average worker compensation and ratios between employee income and household income identified in Table 3-7.

APPENDIX B TABLE 9
ESTIMATED WORKER OCCUPATION DISTRIBUTION, 2019
INDUSTRIAL WORKERS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

	Worker Occupation Distribution Industrial
Major Occupations (2% or more)	
Management Occupations	6.9%
Business and Financial Operations Occupations	5.5%
Computer and Mathematical Occupations	4.8%
Architecture and Engineering Occupations	9.0%
Sales and Related Occupations	8.0%
Office and Administrative Support Occupations	9.8%
Farming, Fishing, and Forestry Occupations	5.0%
Installation, Maintenance, and Repair Occupations	9.2%
Production Occupations	27.9%
Transportation and Material Moving Occupations	9.0%
All Other Worker Occupations - Industrial	<u>4.8%</u>
TOTAL	100.0%

APPENDIX B TABLE 10
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
INDUSTRIAL WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total Industrial Workers
		One Worker	Two Workers	Three+ Workers		
Page 1 of 3						
<i>Management Occupations</i>						
Chief Executives	\$195,300	\$206,000	\$266,000	\$292,000	2.2%	0.2%
General and Operations Managers	\$125,000	\$131,000	\$190,000	\$218,000	31.4%	2.2%
Marketing Managers	\$163,900	\$173,000	\$224,000	\$245,000	4.8%	0.3%
Sales Managers	\$132,500	\$139,000	\$201,000	\$231,000	8.3%	0.6%
Administrative Services and Facilities Managers	\$106,000	\$115,000	\$176,000	\$205,000	3.1%	0.2%
Computer and Information Systems Managers	\$186,600	\$197,000	\$255,000	\$279,000	6.3%	0.4%
Financial Managers	\$143,800	\$150,000	\$218,000	\$251,000	5.8%	0.4%
Industrial Production Managers	\$125,900	\$132,000	\$191,000	\$219,000	10.8%	0.7%
Purchasing Managers	\$150,200	\$158,000	\$205,000	\$225,000	3.0%	0.2%
Transportation, Storage, and Distribution Managers	\$116,200	\$126,000	\$193,000	\$225,000	2.1%	0.1%
Human Resources Managers	\$132,600	\$139,000	\$201,000	\$231,000	2.1%	0.1%
Architectural and Engineering Managers	\$180,000	\$190,000	\$246,000	\$269,000	11.7%	0.8%
Personal Service, Enter. and Recreation Managers	\$133,600	\$140,000	\$203,000	\$233,000	6.1%	0.4%
Other Management Occupations	<u>\$141,600</u>	<u>\$148,000</u>	<u>\$215,000</u>	<u>\$247,000</u>	<u>2.3%</u>	<u>0.2%</u>
Weighted Mean Annual Wage	\$141,600	\$149,000	\$208,000	\$236,000	100.0%	6.9%
<i>Business and Financial Operations Occupations</i>						
Buyers and Purchasing Agents	\$73,900	\$84,000	\$144,000	\$177,000	18.0%	1.0%
Compliance Officers	\$70,200	\$80,000	\$137,000	\$168,000	3.6%	0.2%
Cost Estimators	\$70,100	\$80,000	\$137,000	\$168,000	4.6%	0.3%
Human Resources Specialists	\$72,700	\$83,000	\$142,000	\$174,000	6.5%	0.4%
Logisticians	\$82,900	\$91,000	\$143,000	\$170,000	8.5%	0.5%
Management Analysts	\$83,000	\$91,000	\$143,000	\$170,000	5.3%	0.3%
Training and Development Specialists	\$71,600	\$81,000	\$140,000	\$171,000	3.4%	0.2%
Market Research Analysts and Marketing Specialists	\$68,000	\$77,000	\$133,000	\$163,000	11.0%	0.6%
Project Management and Business Operations Specialists	\$71,300	\$81,000	\$139,000	\$171,000	15.7%	0.9%
Accountants and Auditors	\$85,400	\$93,000	\$147,000	\$175,000	13.6%	0.8%
Financial, Investment, and Risk Specialists	\$93,900	\$103,000	\$162,000	\$192,000	5.9%	0.3%
Other Business and Financial Operations Occupations	<u>\$76,500</u>	<u>\$87,000</u>	<u>\$149,000</u>	<u>\$183,000</u>	<u>3.8%</u>	<u>0.2%</u>
Weighted Mean Annual Wage	\$76,500	\$86,000	\$143,000	\$173,000	100.0%	5.5%
<i>Computer and Mathematical Occupations</i>						
Computer Systems Analysts	\$111,900	\$121,000	\$186,000	\$216,000	8.6%	0.4%
Information Security Analysts	\$101,200	\$109,000	\$168,000	\$196,000	2.1%	0.1%
Computer Network Support Specialists	\$73,400	\$83,000	\$143,000	\$176,000	2.4%	0.1%
Computer User Support Specialists	\$59,100	\$76,000	\$123,000	\$164,000	9.7%	0.5%
Computer Network Architects	\$116,100	\$126,000	\$193,000	\$225,000	2.1%	0.1%
Network and Computer Systems Administrators	\$100,400	\$109,000	\$167,000	\$194,000	5.6%	0.3%
Computer Programmers	\$99,600	\$109,000	\$172,000	\$204,000	3.4%	0.2%
Software Developers and Quality Assurance Analysts	\$113,600	\$123,000	\$188,000	\$220,000	56.0%	2.7%
Computer Occupations, All Other	\$80,300	\$88,000	\$138,000	\$164,000	4.9%	0.2%
Other Computer and Mathematical Occupations	<u>\$103,600</u>	<u>\$112,000</u>	<u>\$172,000</u>	<u>\$200,000</u>	<u>5.1%</u>	<u>0.2%</u>
Weighted Mean Annual Wage	\$103,600	\$114,000	\$175,000	\$207,000	100.0%	4.8%

APPENDIX B TABLE 10
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
INDUSTRIAL WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation ¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total Industrial Workers
		One Worker	Two Workers	Three+ Workers		
<i>Page 2 of 3</i>						
<i>Architecture and Engineering Occupations</i>						
Aerospace Engineers	\$122,700	\$133,000	\$204,000	\$237,000	7.1%	0.6%
Computer Hardware Engineers	\$120,300	\$130,000	\$200,000	\$233,000	3.6%	0.3%
Electrical Engineers	\$102,600	\$111,000	\$170,000	\$199,000	12.1%	1.1%
Electronics Engineers, Except Computer	\$116,300	\$126,000	\$193,000	\$225,000	7.9%	0.7%
Industrial Engineers	\$116,300	\$126,000	\$193,000	\$225,000	20.3%	1.8%
Mechanical Engineers	\$104,600	\$113,000	\$173,000	\$202,000	14.8%	1.3%
Engineers, All Other	\$124,000	\$134,000	\$206,000	\$240,000	6.1%	0.5%
Mechanical Drafters	\$79,200	\$90,000	\$155,000	\$189,000	2.1%	0.2%
Electrical and Electronic Engineering Technicians	\$65,400	\$74,000	\$128,000	\$156,000	7.7%	0.7%
Industrial Engineering Technologists and Technicians	\$29,100	\$40,000	\$76,000	\$118,000	4.6%	0.4%
Calibration and Engineering Technicians	\$75,000	\$85,000	\$146,000	\$179,000	3.2%	0.3%
Other Architecture and Engineering Occupations	\$102,500	\$111,000	\$170,000	\$198,000	10.6%	0.9%
Weighted Mean Annual Wage	\$102,500	\$112,000	\$174,000	\$205,000	100.0%	9.0%
<i>Sales and Related Occupations</i>						
First-Line Supervisors of Non-Retail Sales Workers	\$68,800	\$78,000	\$134,000	\$165,000	4.2%	0.3%
Cashiers	\$29,200	\$40,000	\$76,000	\$118,000	3.1%	0.2%
Counter and Rental Clerks	\$36,000	\$45,000	\$91,000	\$134,000	2.9%	0.2%
Parts Salespersons	\$37,300	\$47,000	\$95,000	\$139,000	4.3%	0.3%
Retail Salespersons	\$32,900	\$41,000	\$84,000	\$122,000	10.4%	0.8%
Sales Representatives	\$63,000	\$71,000	\$123,000	\$151,000	3.0%	0.2%
Sales Reps., Wholesale, Manuf., Technical, Scientific	\$93,700	\$102,000	\$162,000	\$192,000	13.5%	1.1%
Sales Reps., Wholesale & Manuf., Excl. Tech. & Scientific	\$75,500	\$86,000	\$147,000	\$181,000	45.7%	3.6%
Demonstrators and Product Promoters	\$33,400	\$42,000	\$85,000	\$124,000	6.6%	0.5%
Sales Engineers	\$164,700	\$174,000	\$225,000	\$246,000	3.0%	0.2%
Other Sales and Related Occupations	\$68,300	\$78,000	\$133,000	\$163,000	3.3%	0.3%
Weighted Mean Annual Wage	\$68,300	\$78,000	\$133,000	\$167,000	100.0%	8.0%
<i>Office and Administrative Support Occupations</i>						
Supervisors of Office and Admin. Support Workers	\$65,500	\$74,000	\$128,000	\$157,000	6.9%	0.7%
Bookkeeping, Accounting, and Auditing Clerks	\$50,800	\$65,000	\$106,000	\$141,000	11.1%	1.1%
Customer Service Representatives	\$41,300	\$52,000	\$93,000	\$121,000	16.9%	1.7%
Order Clerks	\$45,300	\$57,000	\$102,000	\$133,000	2.3%	0.2%
Production, Planning, and Expediting Clerks	\$56,900	\$73,000	\$119,000	\$158,000	9.1%	0.9%
Shipping, Receiving, and Inventory Clerks	\$40,400	\$51,000	\$91,000	\$119,000	14.3%	1.4%
Executive Secretaries and Executive Admin. Assistants	\$72,100	\$82,000	\$141,000	\$172,000	2.8%	0.3%
Secretaries and Administrative Assistants	\$46,800	\$59,000	\$106,000	\$137,000	9.7%	0.9%
Office Clerks, General	\$40,400	\$51,000	\$91,000	\$119,000	16.8%	1.6%
Other Office and Administrative Support Occupations	\$47,300	\$60,000	\$107,000	\$139,000	10.2%	1.0%
Weighted Mean Annual Wage	\$47,300	\$59,000	\$103,000	\$134,000	100.0%	9.8%
<i>Farming, Fishing, and Forestry Occupations</i>						
Supervisors of Farming, Fishing, and Forestry Workers	\$52,500	\$67,000	\$110,000	\$146,000	5.0%	0.3%
Graders and Sorters, Agricultural Products	\$29,300	\$40,000	\$76,000	\$118,000	3.0%	0.2%
Agricultural Equipment Operators	\$32,500	\$41,000	\$83,000	\$121,000	2.3%	0.1%
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	\$28,200	\$39,000	\$73,000	\$114,000	88.0%	4.4%
Other Farming, Fishing, and Forestry Occupations	\$29,600	\$40,000	\$77,000	\$120,000	1.7%	0.1%
Weighted Mean Annual Wage	\$29,600	\$40,000	\$75,000	\$116,000	100.0%	5.0%

APPENDIX B TABLE 10
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
INDUSTRIAL WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation ¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total Industrial Workers
		One Worker	Two Workers	Three+ Workers		
<i>Installation, Maintenance, and Repair Occupations</i>						
Supervisors of Mechanics, Installers, and Repairers	\$78,400	\$89,000	\$153,000	\$187,000	7.7%	0.7%
Computer, Automated Teller, and Office Machine Repairers	\$43,000	\$54,000	\$97,000	\$126,000	2.6%	0.2%
Electrical and Electronics Repairers, Com. and Industrial	\$58,700	\$75,000	\$122,000	\$163,000	2.5%	0.2%
Aircraft Mechanics and Service Technicians	\$65,200	\$74,000	\$127,000	\$156,000	3.5%	0.3%
Automotive Body and Related Repairers	\$62,500	\$71,000	\$122,000	\$149,000	9.4%	0.9%
Automotive Service Technicians and Mechanics	\$45,600	\$58,000	\$103,000	\$134,000	22.0%	2.0%
Bus and Truck Mechanics and Diesel Engine Specialists	\$52,800	\$68,000	\$110,000	\$147,000	5.0%	0.5%
Mobile Heavy Equipment Mechanics, Except Engines	\$60,300	\$68,000	\$118,000	\$144,000	3.0%	0.3%
Industrial Machinery Mechanics	\$69,100	\$78,000	\$135,000	\$165,000	13.6%	1.3%
Maintenance and Repair Workers, General	\$45,600	\$58,000	\$103,000	\$134,000	9.2%	0.9%
Installation, Maintenance, and Repair Workers, All Other	\$43,500	\$55,000	\$98,000	\$128,000	2.5%	0.2%
Other Installation, Maintenance, and Repair Occupations	<u>\$56,700</u>	<u>\$73,000</u>	<u>\$118,000</u>	<u>\$158,000</u>	<u>19.0%</u>	<u>1.8%</u>
Weighted Mean Annual Wage	\$56,700	\$69,000	\$118,000	\$150,000	100.0%	9.2%
<i>Production Occupations</i>						
Supervisors of Production and Operating Workers	\$72,700	\$83,000	\$142,000	\$174,000	6.7%	1.9%
Aircraft Structure, Surfaces, Rigging, and Assemblers	\$54,700	\$70,000	\$114,000	\$152,000	2.0%	0.6%
Electrical, electronic, and electromechanical assemblers	\$40,500	\$51,000	\$91,000	\$119,000	13.9%	3.9%
Miscellaneous Assemblers and Fabricators	\$36,800	\$46,000	\$94,000	\$137,000	14.4%	4.0%
Machinists	\$46,600	\$59,000	\$105,000	\$137,000	7.0%	2.0%
Welders, Cutters, Solderers, and Brazers	\$50,900	\$65,000	\$106,000	\$141,000	3.5%	1.0%
Separating, Filtering, Precipitating, Machine Operators	\$52,600	\$67,000	\$110,000	\$146,000	3.4%	1.0%
Inspectors, Testers, Sorters, Samplers, and Weighers	\$45,500	\$57,000	\$103,000	\$133,000	7.5%	2.1%
Packaging and Filling Machine Operators and Tenders	\$34,600	\$43,000	\$88,000	\$129,000	6.0%	1.7%
Computer Numerically Controlled Tool Operators	\$42,000	\$53,000	\$95,000	\$123,000	2.9%	0.8%
Other Production Occupations	<u>\$45,200</u>	<u>\$57,000</u>	<u>\$102,000</u>	<u>\$133,000</u>	<u>32.7%</u>	<u>9.1%</u>
Weighted Mean Annual Wage	\$45,200	\$56,000	\$102,000	\$135,000	100.0%	27.9%
<i>Transportation and Material Moving Occupations</i>						
Supervisors of Transportation and Material-Moving Workers	\$71,300	\$81,000	\$139,000	\$171,000	5.4%	0.5%
Driver/Sales Workers	\$32,800	\$41,000	\$83,000	\$122,000	5.1%	0.5%
Heavy and Tractor-Trailer Truck Drivers	\$52,800	\$68,000	\$110,000	\$147,000	8.9%	0.8%
Light Truck Drivers	\$43,000	\$54,000	\$97,000	\$126,000	9.1%	0.8%
Automotive and Watercraft Service Attendants	\$34,500	\$43,000	\$88,000	\$128,000	3.6%	0.3%
Industrial Truck and Tractor Operators	\$37,200	\$47,000	\$95,000	\$138,000	7.6%	0.7%
Cleaners of Vehicles and Equipment	\$30,200	\$38,000	\$77,000	\$112,000	14.7%	1.3%
Laborers and Freight, Stock, and Material Movers, Hand	\$36,700	\$46,000	\$93,000	\$136,000	26.8%	2.4%
Packers and Packagers, Hand	\$29,000	\$40,000	\$75,000	\$117,000	4.9%	0.4%
Stockers and Order Fillers	\$31,900	\$40,000	\$81,000	\$119,000	10.9%	1.0%
Other Transportation and Material Moving Occupations	<u>\$38,500</u>	<u>\$48,000</u>	<u>\$98,000</u>	<u>\$143,000</u>	<u>2.9%</u>	<u>0.3%</u>
Weighted Mean Annual Wage	\$38,500	\$48,000	\$92,000	\$131,000	100.0%	9.0%
					<hr/> 86.1%	

¹ The methodology utilized by the California Employment Development Department (EDD) assumes hourly paid employees are employed full-time. EDD data is adjusted by KMA to reflect the State minimum wage. Annual compensation is calculated by EDD by multiplying hourly wages by 40 hours per work week by 52 weeks.

² Occupation percentages are based on the 2019 National Industry - Specific Occupational Employment survey compiled by the Bureau of Labor Statistics. Wages are based on Occupational Employment Survey data applicable to Santa Barbara County as of 2019 and are adjusted by EDD to the first quarter of 2020.

³ Including occupations representing 2% or more of the major occupation group.

⁴ Household income estimated based average worker compensation and ratios between employee income and household income identified in Table 3-7.

APPENDIX B TABLE 11
ESTIMATED WORKER OCCUPATION DISTRIBUTION, 2019
R&D WORKERS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

	<div>Worker Occupation Distribution</div> <div>R&D</div>
Major Occupations (2% or more)	
Management Occupations	15.4%
Business and Financial Operations Occupations	10.1%
Computer and Mathematical Occupations	12.7%
Architecture and Engineering Occupations	16.0%
Life, Physical, and Social Science Occupations	25.9%
Healthcare Practitioners and Technical Occupations	2.5%
Office and Administrative Support Occupations	7.7%
All Other Worker Occupations - R&D	<u>9.8%</u>
TOTAL	100.0%

APPENDIX B TABLE 12
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
R&D WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total R&D Workers
		One Worker	Two Workers	Three+ Workers		
Page 1 of 3						
<i>Management Occupations</i>						
Chief Executives	\$195,300	\$206,000	\$266,000	\$292,000	2.5%	0.4%
General and Operations Managers	\$125,000	\$131,000	\$190,000	\$218,000	16.1%	2.5%
Marketing Managers	\$163,900	\$173,000	\$224,000	\$245,000	4.5%	0.7%
Sales Managers	\$132,500	\$139,000	\$201,000	\$231,000	2.7%	0.4%
Administrative Services and Facilities Managers	\$106,000	\$115,000	\$176,000	\$205,000	3.6%	0.6%
Computer and Information Systems Managers	\$186,600	\$197,000	\$255,000	\$279,000	8.4%	1.3%
Financial Managers	\$143,800	\$150,000	\$218,000	\$251,000	6.6%	1.0%
Industrial Production Managers	\$125,900	\$132,000	\$191,000	\$219,000	3.2%	0.5%
Human Resources Managers	\$132,600	\$139,000	\$201,000	\$231,000	2.2%	0.3%
Architectural and Engineering Managers	\$180,000	\$190,000	\$246,000	\$269,000	11.3%	1.7%
Medical and Health Services Managers	\$124,700	\$135,000	\$207,000	\$241,000	4.4%	0.7%
Natural Sciences Managers	\$117,700	\$127,000	\$195,000	\$228,000	19.6%	3.0%
Personal Service, Enter. and Recreation Managers	\$133,600	\$140,000	\$203,000	\$233,000	9.2%	1.4%
Other Management Occupations	<u>\$141,200</u>	<u>\$148,000</u>	<u>\$214,000</u>	<u>\$246,000</u>	<u>5.5%</u>	<u>0.8%</u>
Weighted Mean Annual Wage	\$141,200	\$149,000	\$211,000	\$240,000	100.0%	15.4%
<i>Business and Financial Operations Occupations</i>						
Buyers and Purchasing Agents	\$73,900	\$84,000	\$144,000	\$177,000	7.2%	0.7%
Compliance Officers	\$70,200	\$80,000	\$137,000	\$168,000	10.5%	1.1%
Human Resources Specialists	\$72,700	\$83,000	\$142,000	\$174,000	7.3%	0.7%
Logisticians	\$82,900	\$91,000	\$143,000	\$170,000	4.4%	0.4%
Management Analysts	\$83,000	\$91,000	\$143,000	\$170,000	9.1%	0.9%
Training and Development Specialists	\$71,600	\$81,000	\$140,000	\$171,000	3.7%	0.4%
Market Research Analysts and Marketing Specialists	\$68,000	\$77,000	\$133,000	\$163,000	8.3%	0.8%
Project Management and Business Operations Specialists	\$71,300	\$81,000	\$139,000	\$171,000	27.3%	2.8%
Accountants and Auditors	\$85,400	\$93,000	\$147,000	\$175,000	12.4%	1.3%
Financial, Investment, and Risk Specialists	\$93,900	\$103,000	\$162,000	\$192,000	4.3%	0.4%
Other Business and Financial Operations Occupations	<u>\$75,700</u>	<u>\$86,000</u>	<u>\$148,000</u>	<u>\$181,000</u>	<u>5.6%</u>	<u>0.6%</u>
Weighted Mean Annual Wage	\$75,700	\$85,000	\$142,000	\$172,000	100.0%	10.1%
<i>Computer and Mathematical Occupations</i>						
Computer Systems Analysts	\$111,900	\$121,000	\$186,000	\$216,000	12.1%	1.5%
Information Security Analysts	\$101,200	\$109,000	\$168,000	\$196,000	4.1%	0.5%
Computer and Information Research Scientists	\$29,100	\$40,000	\$76,000	\$118,000	6.2%	0.8%
Computer User Support Specialists	\$59,100	\$76,000	\$123,000	\$164,000	4.7%	0.6%
Computer Network Architects	\$116,100	\$126,000	\$193,000	\$225,000	3.8%	0.5%
Network and Computer Systems Administrators	\$100,400	\$109,000	\$167,000	\$194,000	6.0%	0.8%
Database Administrators and Architects*	\$77,800	\$88,000	\$152,000	\$186,000	2.2%	0.3%
Computer Programmers	\$99,600	\$109,000	\$172,000	\$204,000	5.2%	0.7%
Software Developers and Quality Assurance Analysts	\$113,600	\$123,000	\$188,000	\$220,000	35.3%	4.5%
Computer Occupations, All Other	\$80,300	\$88,000	\$138,000	\$164,000	6.5%	0.8%
Operations Research Analysts	\$124,900	\$135,000	\$207,000	\$242,000	2.5%	0.3%
Statisticians	\$82,600	\$90,000	\$142,000	\$169,000	7.1%	0.9%
Other Computer and Mathematical Occupations	<u>\$98,100</u>	<u>\$107,000</u>	<u>\$169,000</u>	<u>\$201,000</u>	<u>4.3%</u>	<u>0.5%</u>
Weighted Mean Annual Wage	\$98,100	\$108,000	\$167,000	\$199,000	100.0%	12.7%

APPENDIX B TABLE 12
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
R&D WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total R&D Workers
		One Worker	Two Workers	Three+ Workers		
<i>Page 2 of 3</i>						
<i>Architecture and Engineering Occupations</i>						
Aerospace Engineers	\$122,700	\$133,000	\$204,000	\$237,000	4.7%	0.8%
Bioengineers and Biomedical Engineers	\$90,700	\$99,000	\$156,000	\$185,000	2.7%	0.4%
Chemical Engineers	\$125,200	\$131,000	\$190,000	\$218,000	3.0%	0.5%
Computer Hardware Engineers	\$120,300	\$130,000	\$200,000	\$233,000	7.5%	1.2%
Electrical Engineers	\$102,600	\$111,000	\$170,000	\$199,000	9.8%	1.6%
Electronics Engineers, Except Computer	\$116,300	\$126,000	\$193,000	\$225,000	8.4%	1.3%
Industrial Engineers	\$116,300	\$126,000	\$193,000	\$225,000	8.0%	1.3%
Mechanical Engineers	\$104,600	\$113,000	\$173,000	\$202,000	16.8%	2.7%
Nuclear Engineers	\$135,800	\$142,000	\$206,000	\$237,000	2.1%	0.3%
Engineers, All Other	\$124,000	\$134,000	\$206,000	\$240,000	10.2%	1.6%
Electrical and Electronic Engineering Technicians	\$65,400	\$74,000	\$128,000	\$156,000	4.4%	0.7%
Mechanical Engineering Technologists and Technicians	\$71,200	\$81,000	\$139,000	\$170,000	2.6%	0.4%
Calibration and Engineering Technicians	\$75,000	\$85,000	\$146,000	\$179,000	5.7%	0.9%
Other Architecture and Engineering Occupations	<u>\$107,300</u>	<u>\$116,000</u>	<u>\$178,000</u>	<u>\$208,000</u>	<u>14.0%</u>	<u>2.2%</u>
Weighted Mean Annual Wage	\$107,300	\$116,000	\$180,000	\$211,000	100.0%	16.0%
<i>Life, Physical, and Social Science Occupations</i>						
Microbiologists	\$91,300	\$100,000	\$157,000	\$187,000	2.7%	0.7%
Biological Scientists, All Other	\$82,500	\$90,000	\$142,000	\$169,000	5.9%	1.5%
Medical Scientists, Except Epidemiologists	\$113,600	\$123,000	\$188,000	\$220,000	27.8%	7.2%
Physicists	\$128,000	\$134,000	\$194,000	\$223,000	3.2%	0.8%
Chemists	\$75,900	\$86,000	\$148,000	\$182,000	7.1%	1.8%
Biological Technicians	\$52,100	\$67,000	\$109,000	\$145,000	16.2%	4.2%
Chemical Technicians	\$65,800	\$75,000	\$128,000	\$157,000	3.6%	0.9%
Social Science Research Assistants	\$55,400	\$71,000	\$116,000	\$154,000	3.5%	0.9%
Life, Physical, and Social Science Technicians	\$60,900	\$69,000	\$119,000	\$146,000	4.6%	1.2%
Other Life, Physical, and Social Science Occupations	<u>\$85,700</u>	<u>\$94,000</u>	<u>\$148,000</u>	<u>\$175,000</u>	<u>25.4%</u>	<u>6.6%</u>
Weighted Mean Annual Wage	\$85,700	\$96,000	\$151,000	\$182,000	100.0%	25.9%
<i>Healthcare Practitioners and Technical Occupations</i>						
Veterinarians	\$164,700	\$174,000	\$225,000	\$246,000	2.3%	0.1%
Registered Nurses	\$111,300	\$120,000	\$185,000	\$215,000	16.9%	0.4%
Nurse Practitioners	\$141,300	\$148,000	\$214,000	\$246,000	3.4%	0.1%
Physicians and Ophthalmologists, Except Pediatric	\$194,600	\$205,000	\$265,000	\$291,000	6.9%	0.2%
Clinical Laboratory Technologists and Technicians	\$73,300	\$83,000	\$143,000	\$175,000	41.2%	1.0%
Veterinary Technologists and Technicians	\$42,600	\$54,000	\$96,000	\$125,000	6.1%	0.2%
Medical Dosimetrists, Records, Health Technicians	\$53,400	\$68,000	\$111,000	\$148,000	5.2%	0.1%
Healthcare Practitioners and Technical Workers	\$62,100	\$70,000	\$121,000	\$149,000	3.1%	0.1%
Other Healthcare Practitioners and Technical Occupations	<u>\$92,000</u>	<u>\$101,000</u>	<u>\$159,000</u>	<u>\$188,000</u>	<u>15.0%</u>	<u>0.4%</u>
Weighted Mean Annual Wage	\$92,000	\$102,000	\$160,000	\$190,000	100.0%	2.5%

APPENDIX B TABLE 12
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
R&D WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker <u>Compensation</u> ¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total R&D Workers
		<u>One Worker</u>	<u>Two Workers</u>	<u>Three+ Workers</u>		
<i>Page 3 of 3</i>						
<i>Office and Administrative Support Occupations</i>						
Supervisors of Office and Admin. Support Workers	\$65,500	\$74,000	\$128,000	\$157,000	7.6%	0.6%
Bookkeeping, Accounting, and Auditing Clerks	\$50,800	\$65,000	\$106,000	\$141,000	6.5%	0.5%
Customer Service Representatives	\$41,300	\$52,000	\$93,000	\$121,000	6.0%	0.5%
Production, Planning, and Expediting Clerks	\$56,900	\$73,000	\$119,000	\$158,000	5.1%	0.4%
Shipping, Receiving, and Inventory Clerks	\$40,400	\$51,000	\$91,000	\$119,000	3.0%	0.2%
Executive Secretaries and Executive Admin. Assistants	\$72,100	\$82,000	\$141,000	\$172,000	16.1%	1.2%
Secretaries and Administrative Assistants	\$46,800	\$59,000	\$106,000	\$137,000	22.1%	1.7%
Office Clerks, General	\$40,400	\$51,000	\$91,000	\$119,000	17.9%	1.4%
Other Office and Administrative Support Occupations	<u>\$52,300</u>	<u>\$67,000</u>	<u>\$109,000</u>	<u>\$145,000</u>	<u>15.7%</u>	<u>1.2%</u>
Weighted Mean Annual Wage	\$52,300	\$64,000	\$111,000	\$142,000	100.0%	7.7%
						90.2%

¹ The methodology utilized by the California Employment Development Department (EDD) assumes hourly paid employees are employed full-time. EDD data is adjusted by KMA to reflect the State minimum wage. Annual compensation is calculated by EDD by multiplying hourly wages by 40 hours per work week by 52 weeks.

² Occupation percentages are based on the 2019 National Industry - Specific Occupational Employment survey compiled by the Bureau of Labor Statistics. Wages are based on Occupational Employment Survey data applicable to Santa Barbara County as of 2019 and are adjusted by EDD to the first quarter of 2020.

³ Including occupations representing 2% or more of the major occupation group.

⁴ Household income estimated based average worker compensation and ratios between employee income and household income identified in Table 3-7.

APPENDIX B TABLE 13
ESTIMATED WORKER OCCUPATION DISTRIBUTION, 2019
WAREHOUSE WORKERS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Worker Occupation Distribution Warehouse	
Major Occupations (2% or more)	
Management Occupations	2.7%
Business and Financial Operations Occupations	2.2%
Office and Administrative Support Occupations	13.1%
Installation, Maintenance, and Repair Occupations	2.8%
Production Occupations	2.3%
Transportation and Material Moving Occupations	72.7%
All Other Worker Occupations - Warehouse	<u>4.2%</u>
TOTAL	100.0%

APPENDIX B TABLE 14
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
WAREHOUSE WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation ¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total Warehouse Workers
		One Worker	Two Workers	Three+ Workers		
Page 1 of 2						
<i>Management Occupations</i>						
General and Operations Managers	\$125,000	\$131,000	\$190,000	\$218,000	35.2%	0.9%
Sales Managers	\$132,500	\$139,000	\$201,000	\$231,000	3.3%	0.1%
Administrative Services and Facilities Managers	\$106,000	\$115,000	\$176,000	\$205,000	4.4%	0.1%
Financial Managers	\$143,800	\$150,000	\$218,000	\$251,000	2.7%	0.1%
Industrial Production Managers	\$125,900	\$132,000	\$191,000	\$219,000	2.2%	0.1%
Transportation, Storage, and Distribution Managers	\$116,200	\$126,000	\$193,000	\$225,000	38.2%	1.0%
Human Resources Managers	\$132,600	\$139,000	\$201,000	\$231,000	2.9%	0.1%
Personal Service, Enter. and Recreation Managers	\$133,600	\$140,000	\$203,000	\$233,000	3.9%	0.1%
Other Management Occupations	<u>\$121,900</u>	<u>\$132,000</u>	<u>\$202,000</u>	<u>\$236,000</u>	<u>7.2%</u>	<u>0.2%</u>
Weighted Mean Annual Wage	\$121,900	\$130,000	\$193,000	\$224,000	100.0%	2.7%
<i>Business and Financial Operations Occupations</i>						
Buyers and Purchasing Agents	\$73,900	\$84,000	\$144,000	\$177,000	13.3%	0.3%
Compliance Officers	\$70,200	\$80,000	\$137,000	\$168,000	2.8%	0.1%
Human Resources Specialists	\$72,700	\$83,000	\$142,000	\$174,000	14.9%	0.3%
Logisticians	\$82,900	\$91,000	\$143,000	\$170,000	13.4%	0.3%
Management Analysts	\$83,000	\$91,000	\$143,000	\$170,000	2.1%	0.0%
Training and Development Specialists	\$71,600	\$81,000	\$140,000	\$171,000	16.3%	0.4%
Market Research Analysts and Marketing Specialists	\$68,000	\$77,000	\$133,000	\$163,000	4.6%	0.1%
Project Management and Business Operations Specialists	\$71,300	\$81,000	\$139,000	\$171,000	19.3%	0.4%
Accountants and Auditors	\$85,400	\$93,000	\$147,000	\$175,000	8.9%	0.2%
Financial, Investment, and Risk Specialists	\$93,900	\$103,000	\$162,000	\$192,000	2.4%	0.1%
Other Business and Financial Operations Occupations	<u>\$75,400</u>	<u>\$86,000</u>	<u>\$147,000</u>	<u>\$180,000</u>	<u>1.9%</u>	<u>0.0%</u>
Weighted Mean Annual Wage	\$75,400	\$85,000	\$142,000	\$173,000	100.0%	2.2%
<i>Office and Administrative Support Occupations</i>						
Supervisors of Office and Admin. Support Workers	\$65,500	\$74,000	\$128,000	\$157,000	10.5%	1.4%
Bookkeeping, Accounting, and Auditing Clerks	\$50,800	\$65,000	\$106,000	\$141,000	2.4%	0.3%
Customer Service Representatives	\$41,300	\$52,000	\$93,000	\$121,000	12.4%	1.6%
Order Clerks	\$45,300	\$57,000	\$102,000	\$133,000	3.9%	0.5%
Production, Planning, and Expediting Clerks	\$56,900	\$73,000	\$119,000	\$158,000	6.9%	0.9%
Shipping, Receiving, and Inventory Clerks	\$40,400	\$51,000	\$91,000	\$119,000	35.8%	4.7%
Weighers, Measurers, Checkers, and Samplers	\$41,200	\$52,000	\$93,000	\$121,000	6.6%	0.9%
Secretaries and Administrative Assistants	\$46,800	\$59,000	\$106,000	\$137,000	3.8%	0.5%
Office Clerks, General	\$40,400	\$51,000	\$91,000	\$119,000	8.5%	1.1%
Other Office and Administrative Support Occupations	<u>\$45,500</u>	<u>\$57,000</u>	<u>\$103,000</u>	<u>\$133,000</u>	<u>9.2%</u>	<u>1.2%</u>
Weighted Mean Annual Wage	\$45,500	\$57,000	\$100,000	\$129,000	100.0%	13.1%

APPENDIX B TABLE 14
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
WAREHOUSE WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation ¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total Warehouse Workers
		One Worker	Two Workers	Three+ Workers		
<i>Installation, Maintenance, and Repair Occupations</i>						
Supervisors of Mechanics, Installers, and Repairers	\$78,400	\$89,000	\$153,000	\$187,000	8.9%	0.2%
Bus and Truck Mechanics and Diesel Engine Specialists	\$52,800	\$68,000	\$110,000	\$147,000	7.6%	0.2%
Mobile Heavy Equipment Mechanics, Except Engines	\$60,300	\$68,000	\$118,000	\$144,000	2.5%	0.1%
Industrial Machinery Mechanics	\$69,100	\$78,000	\$135,000	\$165,000	2.9%	0.1%
Maintenance Workers, Machinery	\$63,600	\$72,000	\$124,000	\$152,000	2.1%	0.1%
Maintenance and Repair Workers, General	\$45,600	\$58,000	\$103,000	\$134,000	62.6%	1.8%
Installation, Maintenance, and Repair Workers, All Other	\$43,500	\$55,000	\$98,000	\$128,000	3.3%	0.1%
Other Installation, Maintenance, and Repair Occupations	<u>\$51,000</u>	<u>\$65,000</u>	<u>\$106,000</u>	<u>\$142,000</u>	<u>10.0%</u>	<u>0.3%</u>
Weighted Mean Annual Wage	\$51,000	\$63,000	\$110,000	\$142,000	100.0%	2.8%
<i>Production Occupations</i>						
Supervisors of Production and Operating Workers	\$72,700	\$83,000	\$142,000	\$174,000	8.4%	0.2%
Miscellaneous Assemblers and Fabricators	\$36,800	\$46,000	\$94,000	\$137,000	19.1%	0.4%
Sewing Machine Operators	\$31,900	\$40,000	\$81,000	\$119,000	2.3%	0.1%
Inspectors, Testers, Sorters, Samplers, and Weighers	\$45,500	\$57,000	\$103,000	\$133,000	28.2%	0.7%
Packaging and Filling Machine Operators and Tenders	\$34,600	\$43,000	\$88,000	\$129,000	11.3%	0.3%
Helpers--Production Workers	\$29,600	\$40,000	\$77,000	\$120,000	2.3%	0.1%
Production Workers, All Other	\$59,800	\$77,000	\$125,000	\$166,000	7.0%	0.2%
Other Production Occupations	<u>\$45,200</u>	<u>\$57,000</u>	<u>\$102,000</u>	<u>\$133,000</u>	<u>21.6%</u>	<u>0.5%</u>
Weighted Mean Annual Wage	\$45,200	\$56,000	\$103,000	\$138,000	100.0%	2.3%
<i>Transportation and Material Moving Occupations</i>						
Supervisors of Transportation and Material-Moving Workers	\$71,300	\$81,000	\$139,000	\$171,000	5.3%	3.9%
Heavy and Tractor-Trailer Truck Drivers	\$52,800	\$68,000	\$110,000	\$147,000	6.6%	4.8%
Industrial Truck and Tractor Operators	\$37,200	\$47,000	\$95,000	\$138,000	22.2%	16.1%
Laborers and Freight, Stock, and Material Movers, Hand	\$36,700	\$46,000	\$93,000	\$136,000	34.1%	24.8%
Packers and Packagers, Hand	\$29,100	\$40,000	\$76,000	\$118,000	7.0%	5.1%
Stockers and Order Fillers	\$31,900	\$40,000	\$81,000	\$119,000	20.2%	14.7%
Other Transportation and Material Moving Occupations	<u>\$38,300</u>	<u>\$48,000</u>	<u>\$97,000</u>	<u>\$142,000</u>	<u>4.6%</u>	<u>3.3%</u>
Weighted Mean Annual Wage	\$38,300	\$48,000	\$94,000	\$135,000	100.0%	72.7%
					<hr/> <hr/> 95.8%	

¹ The methodology utilized by the California Employment Development Department (EDD) assumes hourly paid employees are employed full-time. EDD data is adjusted by KMA to reflect the State minimum wage. Annual compensation is calculated by EDD by multiplying hourly wages by 40 hours per work week by 52 weeks.

² Occupation percentages are based on the 2019 National Industry - Specific Occupational Employment survey compiled by the Bureau of Labor Statistics. Wages are based on Occupational Employment Survey data applicable to Santa Barbara County as of 2019 and are adjusted by EDD to the first quarter of 2020.

³ Including occupations representing 2% or more of the major occupation group.

⁴ Household income estimated based average worker compensation and ratios between employee income and household income identified in Table 3-7.

APPENDIX B TABLE 15
ESTIMATED WORKER OCCUPATION DISTRIBUTION, 2019
RESIDENTIAL CARE WORKERS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

		Worker Occupation Distribution Residential Care
Major Occupations (2% or more)		
Management Occupations		3.5%
Healthcare Practitioners and Technical Occupations		10.8%
Healthcare Support Occupations		44.9%
Food Preparation and Serving Related Occupations		18.0%
Building and Grounds Cleaning and Maintenance Occupations		6.0%
Personal Care and Service Occupations		4.4%
Office and Administrative Support Occupations		5.1%
Installation, Maintenance, and Repair Occupations		2.5%
All Other Worker Occupations - Residential Care		<u>4.8%</u>
TOTAL		100.0%

APPENDIX B TABLE 16
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
RESIDENTIAL CARE WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total Res. Care Workers
		One Worker	Two Workers	Three+ Workers		
Page 1 of 2						
<i>Management Occupations</i>						
General and Operations Managers	\$125,000	\$131,000	\$190,000	\$218,000	29.9%	1.0%
Marketing Managers	\$163,900	\$173,000	\$224,000	\$245,000	2.6%	0.1%
Administrative Services and Facilities Managers	\$106,000	\$115,000	\$176,000	\$205,000	6.6%	0.2%
Food Service Managers	\$64,200	\$73,000	\$125,000	\$154,000	7.3%	0.3%
Medical and Health Services Managers	\$124,700	\$135,000	\$207,000	\$241,000	31.8%	1.1%
Social and Community Service Managers	\$93,900	\$103,000	\$162,000	\$192,000	7.5%	0.3%
Personal Service, Enter. and Recreation Managers	\$133,600	\$140,000	\$203,000	\$233,000	2.7%	0.1%
Other Management Occupations	<u>\$117,300</u>	<u>\$127,000</u>	<u>\$195,000</u>	<u>\$227,000</u>	<u>11.6%</u>	<u>0.4%</u>
Weighted Mean Annual Wage	\$117,300	\$126,000	\$189,000	\$220,000	100.0%	3.5%
<i>Healthcare Practitioners and Technical Occupations</i>						
Registered Nurses	\$111,300	\$120,000	\$185,000	\$215,000	34.3%	3.7%
Dietetic Technicians	\$31,200	\$39,000	\$79,000	\$116,000	2.3%	0.3%
Licensed Practical and Licensed Vocational Nurses	\$62,200	\$71,000	\$121,000	\$149,000	52.3%	5.6%
Other Healthcare Practitioners and Technical Occupations	<u>\$80,300</u>	<u>\$88,000</u>	<u>\$138,000</u>	<u>\$164,000</u>	<u>11.1%</u>	<u>1.2%</u>
Weighted Mean Annual Wage	\$80,300	\$89,000	\$144,000	\$173,000	100.0%	10.8%
<i>Healthcare Support Occupations</i>						
Home Health and Personal Care Aides	\$30,000	\$38,000	\$76,000	\$111,000	58.4%	26.2%
Nursing Assistants	\$38,300	\$48,000	\$97,000	\$142,000	37.0%	16.6%
Medical Assistants	\$37,800	\$47,000	\$96,000	\$140,000	3.5%	1.6%
Other Healthcare Support Occupations	<u>\$33,400</u>	<u>\$42,000</u>	<u>\$85,000</u>	<u>\$124,000</u>	<u>1.1%</u>	<u>0.5%</u>
Weighted Mean Annual Wage	\$33,400	\$42,000	\$85,000	\$124,000	100.0%	44.9%
<i>Food Preparation and Serving Related Occupations</i>						
Supervisors of Food Preparation and Serving Workers	\$39,200	\$49,000	\$100,000	\$146,000	5.0%	0.9%
Cooks, Institution and Cafeteria	\$41,700	\$53,000	\$94,000	\$122,000	24.6%	4.4%
Food Preparation Workers	\$30,800	\$39,000	\$78,000	\$114,000	5.7%	1.0%
Fast Food and Counter Workers	\$29,100	\$40,000	\$76,000	\$118,000	5.5%	1.0%
Waiters and Waitresses	\$34,800	\$44,000	\$88,000	\$129,000	8.2%	1.5%
Food Servers, Nonrestaurant	\$30,700	\$39,000	\$78,000	\$114,000	36.5%	6.6%
Dining Room and Cafeteria Attendants	\$29,100	\$40,000	\$76,000	\$118,000	4.3%	0.8%
Dishwashers	\$29,100	\$40,000	\$76,000	\$118,000	6.0%	1.1%
Other Food Preparation and Serving Related Occupations	<u>\$34,100</u>	<u>\$43,000</u>	<u>\$87,000</u>	<u>\$127,000</u>	<u>4.2%</u>	<u>0.8%</u>
Weighted Mean Annual Wage	\$34,100	\$44,000	\$84,000	\$120,000	100.0%	18.0%
<i>Building and Grounds Cleaning and Maintenance Occupations</i>						
Supervisors of Housekeeping & Janitorial Workers	\$45,500	\$57,000	\$103,000	\$133,000	4.8%	0.3%
Janitors and Cleaners	\$34,500	\$43,000	\$88,000	\$128,000	10.4%	0.6%
Maids and Housekeeping Cleaners	\$31,500	\$40,000	\$80,000	\$117,000	81.4%	4.9%
Landscaping and Groundskeeping Workers	\$33,500	\$42,000	\$85,000	\$124,000	3.0%	0.2%
Other Building and Grounds Cleaning and Maint. Occupations	<u>\$32,600</u>	<u>\$41,000</u>	<u>\$83,000</u>	<u>\$121,000</u>	<u>0.4%</u>	<u>0.0%</u>
Weighted Mean Annual Wage	\$32,600	\$41,000	\$82,000	\$119,000	100.0%	6.0%

APPENDIX B TABLE 16
AVERAGE ANNUAL WORKER COMPENSATION AND ESTIMATED HOUSEHOLD INCOME, 2020
RESIDENTIAL CARE WORKER OCCUPATIONS
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Occupation ³	2020 Avg. Worker Compensation ¹	Household Income Estimate ⁴			% of Total Occupation Group ²	% of Total Res. Care Workers
		One Worker	Two Workers	Three+ Workers		
Page 2 of 2						
<i>Personal Care and Service Occupations</i>						
Supervisors of Personal Service, Entert. & Rec. Workers	\$47,900	\$60,000	\$108,000	\$141,000	18.8%	0.8%
Concierges	\$40,000	\$50,000	\$90,000	\$117,000	9.3%	0.4%
Exercise Trainers and Group Fitness Instructors	\$58,700	\$75,000	\$122,000	\$163,000	2.0%	0.1%
Recreation Workers	\$33,500	\$42,000	\$85,000	\$124,000	54.8%	2.4%
Other Personal Care and Service Occupations	<u>\$38,000</u>	<u>\$48,000</u>	<u>\$97,000</u>	<u>\$141,000</u>	<u>15.1%</u>	<u>0.7%</u>
Weighted Mean Annual Wage	\$38,000	\$48,000	\$92,000	\$130,000	100.0%	4.4%
<i>Office and Administrative Support Occupations</i>						
Supervisors of Office and Admin. Support Workers	\$65,500	\$74,000	\$128,000	\$157,000	8.4%	0.4%
Bookkeeping, Accounting, and Auditing Clerks	\$50,800	\$65,000	\$106,000	\$141,000	7.1%	0.4%
Customer Service Representatives	\$41,300	\$52,000	\$93,000	\$121,000	2.1%	0.1%
Receptionists and Information Clerks	\$34,800	\$44,000	\$88,000	\$129,000	37.9%	2.0%
Executive Secretaries and Executive Admin. Assistants	\$72,100	\$82,000	\$141,000	\$172,000	2.1%	0.1%
Medical Secretaries and Administrative Assistants	\$43,700	\$55,000	\$99,000	\$128,000	4.5%	0.2%
Secretaries and Administrative Assistants	\$46,800	\$59,000	\$106,000	\$137,000	12.8%	0.7%
Office Clerks, General	\$40,400	\$51,000	\$91,000	\$119,000	16.0%	0.8%
Other Office and Administrative Support Occupations	<u>\$43,000</u>	<u>\$54,000</u>	<u>\$97,000</u>	<u>\$126,000</u>	<u>9.0%</u>	<u>0.5%</u>
Weighted Mean Annual Wage	\$43,000	\$53,000	\$98,000	\$132,000	100.0%	5.1%
<i>Installation, Maintenance, and Repair Occupations</i>						
Supervisors of Mechanics, Installers, and Repairers	\$78,400	\$89,000	\$153,000	\$187,000	9.8%	0.2%
Maintenance and Repair Workers, General	\$45,600	\$58,000	\$103,000	\$134,000	87.5%	2.2%
Other Installation, Maintenance, and Repair Occupations	<u>\$48,900</u>	<u>\$62,000</u>	<u>\$110,000</u>	<u>\$143,000</u>	<u>2.7%</u>	<u>0.1%</u>
Weighted Mean Annual Wage	\$48,900	\$61,000	\$108,000	\$139,000	100.0%	2.5%
						95.2%

- ¹ The methodology utilized by the California Employment Development Department (EDD) assumes hourly paid employees are employed full-time. EDD data is adjusted by KMA to reflect the State minimum wage. Annual compensation is calculated by EDD by multiplying hourly wages by 40 hours per work week by 52 weeks.
- ² Occupation percentages are based on the 2019 National Industry - Specific Occupational Employment survey compiled by the Bureau of Labor Statistics. Wages are based on Occupational Employment Survey data applicable to Santa Barbara County as of 2019 and are adjusted by EDD to the first quarter of 2020.
- ³ Including occupations representing 2% or more of the major occupation group.
- ⁴ Household income estimated based average worker compensation and ratios between employee income and household income identified in Table 3-7.

**APPENDIX B TABLE 17
INDUSTRIES REPRESENTED
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA**

NAICS	Representative Industries	Percent of Employment
Page 1 of 3		
<u>Office</u>		
621100	Offices of Physicians	11.639%
541300	Architectural, Engineering, and Related Services	10.283%
551100	Management of Companies and Enterprises	8.914%
541500	Computer Systems Design and Related Services	8.537%
531000	Real Estate	7.463%
511200	Software Publishers	5.588%
621200	Offices of Dentists	4.756%
5220A1	Credit Intermediation and Related Activities (5221 And 5223 only)	4.141%
621300	Offices of Other Health Practitioners	3.672%
541700	Scientific Research and Development Services	3.383%
541600	Management, Scientific, and Technical Consulting Services	3.113%
541200	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	3.086%
541100	Legal Services	2.805%
813400	Civic and Social Organizations	2.757%
524200	Agencies, Brokerages, and Other Insurance Related Activities	2.566%
519100	Other Information Services	2.277%
541900	Other Professional, Scientific, and Technical Services	2.175%
561100	Office Administrative Services	1.853%
813200	Grantmaking and Giving Services	1.268%
561400	Business Support Services	1.215%
541800	Advertising and Related Services	1.120%
523000	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	1.057%
813900	Business, Professional, Labor, Political, and Similar Organizations	0.996%
524100	Insurance Carriers	0.917%
813300	Social Advocacy Organizations	0.907%
522200	Nondepository Credit Intermediation	0.895%
517000	Telecommunications	0.794%
541400	Specialized Design Services	0.664%
518200	Data Processing, Hosting, and Related Services	0.654%
561900	Other Support Services	0.505%
<u>Medical</u>		
622100	General Medical and Surgical Hospitals	65.984%
623100	Nursing Care Facilities (Skilled Nursing Facilities)	14.814%
621400	Outpatient Care Centers	13.245%
621500	Medical and Diagnostic Laboratories	3.730%
621900	Other Ambulatory Health Care Services	2.227%

APPENDIX B TABLE 17
INDUSTRIES REPRESENTED
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

NAICS	Representative Industries	Percent of Employment
Page 2 of 3		
<u>Retail / Commercial</u>		
722500	Restaurant and Other Eating Places	45.679%
4450A1	Food and Beverage Stores (4451 and 4452 only)	12.314%
444100	Building Material and Supplies Dealers	3.979%
448100	Clothing Stores	3.863%
452000	General Merchandise Stores	3.571%
441100	Automobile Dealers	3.349%
446100	Health and Personal Care Stores	3.316%
812100	Personal Care Services	1.945%
4530A1	Miscellaneous Store Retailers (4532 and 4533 only)	1.794%
722300	Special Food Services	1.781%
451100	Sporting Goods/Musical Instrument Stores	1.669%
447100	Gasoline Stations	1.629%
443100	Electronics and Appliance Stores	1.536%
812900	Other Personal Services	1.525%
812300	Drycleaning and Laundry Services	1.439%
722400	Drinking Places (Alcoholic Beverages)	1.304%
441300	Auto Parts, Accessories, and Tire Stores	1.292%
453900	Other Miscellaneous Store Retailers	1.187%
442200	Home Furnishings Stores	1.088%
445300	Beer, Wine, and Liquor Stores	1.016%
713940	Fitness and Recreational Sports Centers	0.767%
512130	Motion Picture and Video Exhibition	0.749%
442100	Furniture Stores	0.594%
532100	Automotive Equipment Rental and Leasing	0.507%
448200	Shoe Stores	0.502%
444200	Lawn & Garden Equipment/Supplies Stores	0.440%
448300	Jewelry, Luggage & Leather Goods Stores	0.404%
441200	Other Motor Vehicle Dealers	0.299%
451200	Book, Periodical, and Music Stores	0.287%
453100	Florists	0.175%
713940	Fitness and Recreational Sports Centers	0.000%
<u>Hotel</u>		
721100	Traveler Accommodation (with Casino hotels removed)	100.00%

APPENDIX B TABLE 17
INDUSTRIES REPRESENTED
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

NAICS	Representative Industries	Percent of Employment
Page 3 of 3		
<u>Industrial</u>		
334500	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	19.453%
312100	Beverage Manufacturing	12.730%
811100	Automotive Repair and Maintenance	8.017%
339100	Medical Equipment and Supplies Manufacturing	6.334%
423400	Professional and Commercial Equipment and Supplies Merchant Wholesalers	4.486%
4230A1	Merchant Wholesalers, Durable Goods (4232, 4233, 4235, 4236, 4237, and 4238)	4.376%
3330A1	Machinery Manufacturing (3331, 3332, 3334, and 3339 only)	4.221%
334400	Semiconductor and Other Electronic Component Manufacturing	4.039%
423800	Machinery, Equipment, and Supplies Merchant Wholesalers	3.650%
339900	Other Miscellaneous Manufacturing	2.555%
332700	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	2.490%
423100	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	2.026%
311800	Bakeries and Tortilla Manufacturing	1.961%
333300	Commercial and Service Industry Machinery Manufacturing	1.832%
811300	Commercial Machinery Repair/Maintenance	1.626%
111400	Greenhouse, Nursery, and Floriculture Production	1.613%
335100	Electric Lighting Equipment Manufacturing	1.577%
3370A1	Furniture and Related Product Manufacturing (3371 and 3372 only)	1.331%
334200	Communications Equipment Manufacturing	1.264%
323100	Printing and Related Support Activities	1.102%
325400	Pharmaceutical and Medicine Manufacturing	0.702%
327000	Nonmetallic Mineral Product Manufacturing	0.672%
3320A1	Fabricated Metal Product Manufacturing (3321, 3322, 3325, 3326, and 3329 only)	0.599%
321900	Other Wood Product Manufacturing	0.381%
311900	Other Food Manufacturing	0.285%
811200	Electronic Equipment Repair/Maintenance	0.239%
336300	Motor Vehicle Parts Manufacturing	0.225%
3250A1	Chemical Manufacturing (3251, 3252, 3253, and 3259 only)	0.136%
<u>Research and Development</u>		
541710	Research and Development in the Physical, Engineering, and Life Sciences	100.000%
<u>Warehouse</u>		
493100	Warehousing and Storage	100.000%
<u>Residential Care</u>		
623300	Continuing Care Retirement Communities and Assisted Living Facilities	100.000%

(1) Employment by industry is weighted to reflect mix of industries in Santa Barbara County using data from the Quarterly Census of Employment and Wages for 1st Q 2020.

NAICS = North American Industry Classification System

APPENDIX TABLE 18
IDENTIFICATION OF CITY USE CLASIFICATIONS BY NEXUS STUDY USE CATEGORY (1)
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Use Categories Utilized in City Zoning Code	Nexus Study Use Categories								
	Office	Medical	Retail / Commercial	Hotel	Industrial	Research and Development	Warehouse	Residential Care	Not Addressed in Nexus Study
Animal Keeping									x
Caretaker Unit									x
Family Day Care									x
Adult Bookstore, Adult Novelty Store, or Adult Video Store			x						
Adult Live Entertainment Theater			x						
Adult Motion Picture or Video Arcade			x						
Adult Motion Picture Theater			x						
Adult-Oriented Business			x						
Animal Sales and Grooming			x						
Animal Sales, Care and Services			x						
Auction			x						
Automobile Rentals			x						
Automobile/Vehicle Sales and Leasing			x						
Automobile/Vehicle Service and Repair			x						
Automobile/Vehicle Washing			x						
Automobile/Vehicles Sales and Services			x						
Banquet and Conference Center			x						
Bars/Night Clubs/ Lounges			x						
Boarding, Kennel					x				
Building Materials, Sales, and Service			x						
Business Services	x								
Cannabis Microbusiness			x						
Cannabis Retailer			x						
Catering Service			x						
Check-Cashing Business			x						
Cinemas			x						
Commercial Entertainment and Recreation			x						
Eating and Drinking Establishments			x						
Finance, Insurance, and Real Estate Services	x								
Food and Beverage Sales			x						
Funeral Parlors and Interment Services			x						
General Market			x						
General Personal Services			x						
General Retail			x						
Hotels and Motels				x					
Indoor Sports and Recreation			x						
Information Technology Services	x								
Instructional Services	x								
Large Format Retail			x						
Liquor Store			x						
Live/Work Units									x
Lodging				x					
Maintenance and Repair Services			x						
Media-Production Facility					x				

APPENDIX TABLE 18
IDENTIFICATION OF CITY USE CLASIFICATIONS BY NEXUS STUDY USE CATEGORY (1)
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Use Categories Utilized in City Zoning Code	Nexus Study Use Categories								
	Office	Medical	Retail / Commercial	Hotel	Industrial	Research and Development	Warehouse	Residential Care	Not Addressed in Nexus Study
Medical, Dental, and Health-Related Services	X (for medical office)	X (for medical clinics)							
Nurseries and Garden Centers			x (2)						
Outdoor Entertainment									x
Personal Services			x						
Professional Services	x								
Recreational Vehicle Parks									x
Restaurant			x						
Restricted Personal Services			x						
Retail Sales			x						
Service and Gas Stations			x						
Specialty Food Sales and Facilities			x						
Storefront			x						
Time Share Use									x
Veterinary Services			x						
Automobile Wrecking/Junk Yard					x (2)				
Cannabis Cultivation					x (2)				
Cannabis Distribution							x		
Cannabis Manufacturing					x				
Cannabis Testing					x				
Chemical, Mineral and Explosives Storage							x		
Construction and Material Yards							x (2)		
Custom Manufacturing					x				
Heavy Manufacturing					x				
Heavy Vehicle and Large Equipment Sales/Rental, Service, and Repair					x (2)				
Indoor Cultivation					x				
Indoor Warehousing and Storage							x		
Industrial Uses					x				
Non-Volatile Solvent Manufacturing					x				
Nursery			x (2)						
Oil and Gas Facilities									x
Outdoor Storage Yard									x
Packaging and Labeling					x				
Personal Storage									x
Processor					x				
R&D and Technology						x			
Towing Services					x				
Vehicle/Equipment Facilities					x				
Volatile Solvent Manufacturing					x				
Wholesale Trade, Warehouse, Storage and Distribution							x		
Wholesaling and Distribution							x		
Cemetery									x
Colleges and Trade Schools									x
Community Assembly									x
Community Garden									x
Cultural Institutions and Facilities									x
Day Care Facility									x
Emergency Shelter									x

APPENDIX TABLE 18
IDENTIFICATION OF CITY USE CLASIFICATIONS BY NEXUS STUDY USE CATEGORY (1)
NON-RESIDENTIAL AFFORDABLE HOUSING NEXUS ANALYSIS
CITY OF GOLETA

Use Categories Utilized in City Zoning Code	Nexus Study Use Categories								
	Office	Medical	Retail / Commercial	Hotel	Industrial	Research and Development	Warehouse	Residential Care	Not Addressed in Nexus Study
Government Buildings									x
Hospital		x							
Park and Recreation Facilities									x
Parking, Public or Private									x
Passive Open Space									x
Public Safety Facility									x
Public/Quasi-Public Uses									x
Schools, Private									x
Skilled Nursing Facility		x							
Social Service Facilities									x
Residential Care Facilities								x	
Antennas and Transmission Towers									x
Communication Facilities									x
Light Fleet-Based Services					x (2)				
Major Utilities									x
Transportation Passenger Terminal									x
Transportation, Communication, and Utility Uses									x

(1) This matrix is intended to serve as a general guide regarding how City use categories relate to Nexus Analysis use / building type categories; however, there may be instances of specific projects that, because of their unique character, another category would be more applicable. Buildings may house more than one use over their useful life and Nexus Analysis findings reflect a representative range of uses.

(2) With respect to indoor conditioned spaces within such facilities. Nexus Analysis does not address outdoor storage or open air facilities.