

**Table 1-1 – County of Sacramento
Non-Residential Affordable Housing Fees
(Per Square Foot of Gross Building Area)**

Office	\$0.97
Hotel	\$0.92
R&D	\$0.82
Commercial	\$0.77
Manufacturing	\$0.61
Warehouse	\$0.26

2.0 SUMMARY AND RECOMMENDATIONS

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

1. ***Development Activity in County Unincorporated Area*** – Much of the recent development activity in the unincorporated area has consisted of warehouse / logistics and industrial space, a sector relatively insulated from the economic effects of the coronavirus pandemic. The County has also experienced significant retail development over the last decade. Office and hotel development have been more limited.
2. ***Total Fees and Permit Cost Comparison*** – To assist in understanding how total fees and permit costs in the County compare to other jurisdictions, KMA assembled information regarding fees in the cities of Sacramento, Rancho Cordova, Elk Grove, West Sacramento and Placer County. The results indicate that the County's fees for industrial and warehouse are higher than the comparison jurisdictions except Elk Grove, retail fees are higher than the comparisons other than Rancho Cordova, and office and hotel fees fall towards the middle of the range. The total development fee burden is one of many factors non-residential developers and end users may consider in assessing potential development sites. Other important factors include land costs, infrastructure capacity, and proximity to labor and customers.
3. ***Housing Fee Comparison*** – Seven affordable housing fee programs were identified in the Sacramento region, all with modest fee levels under \$3 per square foot. The County's fees are at the lower end of the range. Rancho Cordova and Citrus Heights have identical fees that originate from the County's program prior to their incorporation as cities. The City of Sacramento, Folsom and Placer County have somewhat higher housing fees ranging from \$1.70 to \$2.76 per square foot, except for warehouse at \$0.76 per square foot in Sacramento and exempt in Placer County. Placer County's fees currently apply only in the Sierra / Tahoe area. Elk Grove has similar fees to the County in some categories, higher fees in others, and office is exempt. See Section 3.6 for an illustration of the County's housing fees if they had been indexed for cost increases since 1992.
4. ***Housing Fees as a Percent of Costs*** – The County's current housing fees represent an estimated 2% to 4% of the overall fees and permit costs that apply to new non-residential construction, depending on the building type, and 0.2% to 0.4% of the total cost to develop new non-residential buildings inclusive of direct construction, design and other indirect costs, financing, and land. The County's housing fees are unlikely to have a material influence on development decisions because they are a small fraction of the overall cost picture for new development projects.
5. ***Nexus Results*** – The Nexus Analysis establishes an upper limit on fees ranging from \$15.10 to \$69.60 per square foot depending on the building type and provides

considerable flexibility to select fees anywhere below this level taking into account a range of policy considerations.

Recommendations

While the Nexus Analysis results allow consideration of far higher fees, based on review of non-residential market conditions, development costs, and the comparison of overall fee burden summarized above, KMA recommends consideration of:

- Warehouse and industrial fees of up to approximately \$2 per square foot; and
- Fees for other non-residential development of up to approximately \$3 per square foot.

While the County has been successful in attracting large-scale warehouse and logistics development, lower fees are recommended relative to other non-residential uses based on the findings of the fee comparison and considering the lower rent, lower cost nature of these buildings, which makes them more sensitive to additional costs such as an increase in fees.

KMA also recommends the County consider implementing an automatic indexing feature. This will allow the fee to keep pace with increases in costs over time. Applying the same index as is currently used for the County's residential fees is recommended (Building Cost Index, 20-City Average, published by Engineer News-Record / McGraw Hill).

3.0 CONTEXT MATERIALS

The purpose of this section is to provide a series of context materials and analyses to assist the County in updating its Housing Trust Fund fee program. 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 updated fee levels. This section includes a range of materials that decision making bodies often find useful as context for decision-making.

3.1 Nexus Maximum Fee Levels

The separate Nexus Analysis establishes a maximum or ceiling on potential updated fee levels based on the cost of mitigating the affordable housing impacts of new non-residential development. Table 3-1 indicates the Nexus Analysis results. As is typical, maximum fee level findings are high. Findings are technical analysis results only and are not recommendations. The County is free to take other policy considerations into account in selecting fees anywhere below the maximums identified in the Nexus Analysis.

Office	\$47.60
Medical	\$48.20
Retail / Commercial	\$69.60
Hotel	\$16.50
Industrial / Manufacturing	\$38.90
Research and Development	\$15.40
Warehouse	\$16.40
Residential Care	\$15.10

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

Source: Nexus Analysis. Note: Nexus findings are not recommended fee levels.

The recommendations identified in Section 2.0 suggest simplification of the County's fee schedule to fewer categories. Notwithstanding this potential simplification of categories, the Nexus Analysis addresses each of the categories in the County's current fee schedule so as to provide updated nexus findings for the program as currently adopted. Providing separate findings for each of the building types in Table 3-1 also enables important distinctions in worker occupations and employment density to be taken into consideration in the analysis. Although not identified as separate fee categories in the County's current fee schedule, separate findings are provided for Medical and Residential Care to capture distinctions in worker occupation and employment density for these uses and to provide flexibility to establish separate fees for these uses in the future.

3.2 Market Context

The non-residential market in the Sacramento region experienced strengthening conditions over the past decade as exhibited by rising rents and occupancy rates. However, the economic downturn caused by the coronavirus pandemic impacted the office, retail, and hotel sectors, resulting in increased levels of vacancy and uncertainty regarding the path of recovery. Effects of the pandemic on the commercial real estate market are still being felt as of summer 2021, despite most pandemic restrictions being lifted and the recovery of many of the jobs that had been lost in the early months of the coronavirus pandemic.

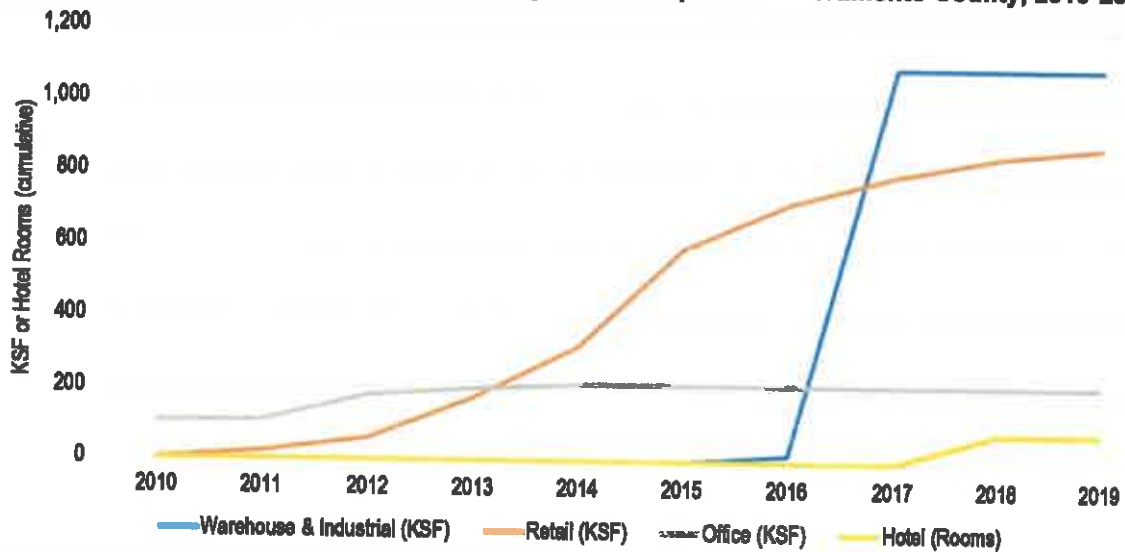
The warehouse and industrial sectors, in contrast, have generally not been adversely impacted by the coronavirus pandemic. There have been low levels of vacancy, rising rental rates, and positive absorption of industrial space through the coronavirus pandemic. Demand for logistics and warehouse space has been spurred in part by the expansion in e-commerce.

In unincorporated Sacramento County, warehouse development emerged as an area of strength several years prior to the pandemic. A major Class A fulfillment center encompassing approximately 855,000 square feet was completed and occupied by Amazon in 2017. Several major projects at Metro Air Park and McClellan Park added more than two million square feet of warehouse space in 2020 and early 2021, and additional space is currently under construction.

Figure 3-1 provides a summary of cumulative development activity in unincorporated Sacramento County from 2010 through 2019. As shown, more than one million square feet of warehouse/ industrial space and nearly 900,000 square feet of retail space were built between 2010 and 2019 in unincorporated areas. Over the same period, development of office space has been very limited, and less than 100 hotel rooms have been built in unincorporated areas, although several hotel projects are proposed at Metro Air Park.

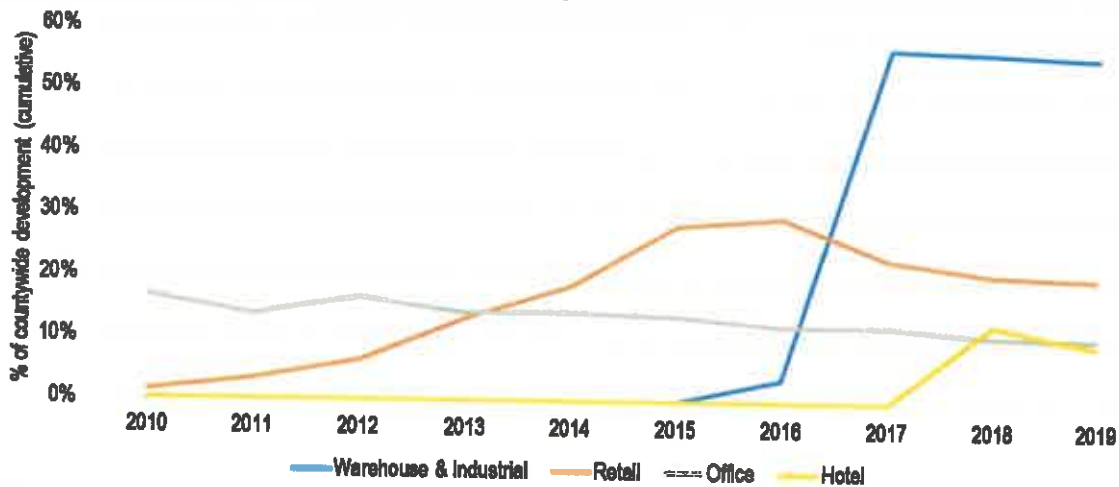
Figure 3-2 expresses cumulative development activity in unincorporated areas as a percentage of total development activity throughout the county, including incorporated cities. Unincorporated areas have captured more than half of cumulative warehouse/ industrial development within the county from 2010 to 2019, primarily driven by the Amazon facility described above. In contrast, the County captured only approximately 10% to 20% of countywide development of new office, retail, and hotels over the same period.

Figure 3-1 – Cumulative Development Activity in Unincorporated Sacramento County, 2010-2019



Source: Costar

Figure 3-2 – Cumulative Development Activity in Unincorporated Sacramento County as Percentage of Countywide Development Activity, 2010-2019



Source: Costar

3.3 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 County 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 the total development costs.

Development Prototypes

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

- Warehouse/distribution,
- Light industrial,
- Retail,
- Office, and
- Hotel.

Development prototypes were identified based on a review of recent and pipeline development activity and are intended as representative of the types of non-residential development expected to occur in the County in the coming years.

Table 3-2 provides a summary of programmatic assumptions for each 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 building prototype for purposes of the development cost assessment; rather, the intent of the analysis is to provide a general range of development costs for new projects and the impact fees can have relative to those costs. All prototypes assume surface parking consistent with recent projects.

Table 3-2 – Non-Residential Development Prototypes

	Warehouse / Distribution	Light Industrial	Retail	Office	Hotel
Land Acres	28.70	5.74	1.84	2.30	1.87
Gross Building Area	500,000	100,000	20,000	50,000	65,000
Hotel Rooms					105
Building Floors	1	1	1	2	4
FAR	0.40	0.40	0.25	0.50	0.80

Geographic Sub-Areas

Total development costs of each non-residential prototype are analyzed based on conditions in one or more of the following geographic subareas:

- Metro Air Park,
- Mather Field,
- Arden-Arcade, and
- Antelope.

The geographic subareas are representative of the range of development conditions within the county with respect to land costs and area-specific impact fees. Table 3-3 pairs each of the building prototypes with applicable geographic subareas based on where development of each prototype has occurred or is likely to occur in the future. For prototypes paired with more than one subarea, average land costs and impact fees are reflected in the cost analysis.

Table 3-3 – Geographic Sub-Areas Paired with Non-Residential Development Prototypes

	Warehouse / Distribution	Light Industrial	Retail	Office	Hotel
a) Metro Air Park	x	x		x	x
b) Mather	x	x			
c) Arden-Arcade			x	x	
d) Antelope			x		

Development Costs

The estimates of total development costs for the non-residential prototypes are shown in Table 3-4. The costs include estimates for land acquisition, direct construction costs, and indirect and financing costs of development. Additional detail is provided in Appendix A Table 2. The estimates are based on KMA's database of costs from similar commercial projects and third-party data sources. Impact fees were calculated by KMA from published fee schedules.

As shown, total development costs for the non-residential prototypes range from a low of approximately \$125-\$155/square foot for the warehouse/distribution prototype to a high of approximately \$315-\$385/square foot for the retail prototype.

Table 3-4 – Non-Residential Development Cost Summary

	Warehouse / Distribution	Light Industrial	Retail	Office	Hotel
Land Acquisition ⁽¹⁾	\$13/sf	\$13/sf	\$60/sf	\$20/sf	\$14/sf
Direct Costs ⁽²⁾	\$95/sf	\$120/sf	\$175/sf	\$160/sf	\$185/sf
Indirect Costs ⁽³⁾	\$32/sf	\$41/sf	\$114/sf	\$83/sf	\$79/sf
Total Costs	\$139/sf	\$173/sf	\$349/sf	\$263/sf	\$278/sf
Total Costs Range (+/-10%)	\$125-\$155/sf	\$155-\$190/sf	\$315-\$385/sf	\$235-\$290/sf	\$250-\$305/sf

⁽¹⁾ Land acquisition costs estimated based on recent land sale comps. (See Appendix A Table 11 to 13.)

⁽²⁾ Direct construction cost estimates from RS Means and other project pro formas.

⁽³⁾ Impact fees reflected in indirect costs exclude the housing trust fee.

Fees as a Percentage of Development Costs

One approach to understanding the likelihood that a new fee will impact development decisions is to consider how fees relate to the total development cost of projects. Fees representing a smaller share of development costs will be less likely to affect development decisions and vice versa. Table 3-5 summarizes a range of potential fees on non-residential projects 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 \$5 per square foot fee represents for a retail building.

Table 3-5 – Linkage Fees as a Percentage of Total Development Costs

	Warehouse / Distribution	Light Industrial	Retail	Office	Hotel
Total Cost Range	\$125-\$155/sf	\$155-\$190/sf	\$315-\$385/sf	\$235-\$290/sf	\$250-\$305/sf
Current Fee as % of Costs*					
Current Linkage Fee	\$0.26	\$0.61	\$0.77	\$0.97	\$0.92
% of Costs	0.19%	0.35%	0.22%	0.37%	0.33%
Illustrative Fee as % of Costs*					
\$0.50/sf	0.36%	0.29%	0.14%	0.19%	0.18%
\$1.00/sf	0.72%	0.58%	0.29%	0.38%	0.36%
\$2.00/sf	1.43%	1.16%	0.57%	0.76%	0.72%
\$3.00/sf	2.15%	1.73%	0.86%	1.14%	1.08%
\$4.00/sf	2.87%	2.31%	1.15%	1.52%	1.44%
\$5.00/sf	3.58%	2.89%	1.43%	1.90%	1.80%
\$6.00/sf	4.30%	3.47%	1.72%	2.28%	2.16%
	key:	up to 1%	1-2%	2-3%	over 3%

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

3.4 Other Non-Residential Affordable Housing Fee Programs

Statewide, there are over 50 jurisdictions with non-residential affordable housing impact fee programs. In Sacramento County, five of seven incorporated cities have a housing fee on non-residential development. Of these cities, all have fees of \$3/square foot or less and have reduced fees for low intensity industrial and warehouse uses.

Table 3-6 provides a summary of fee levels adopted by jurisdictions within the County, Placer County, and other counties. Fees in Citrus Heights and Rancho Cordova are identical to the current County fees. Fees in the cities of Sacramento, Folsom, and Elk Grove are generally higher than County fees (except for office projects in Elk Grove, which are exempt from housing impact fees, and large projects in Folsom, which receive a fee discount). Placer County's fees were adopted in 2020 and apply only within the Sierra Nevada and Tahoe areas. Placer County staff has indicated that extension of fees countywide will likely be considered in 2021.

Table 3-6 – Affordable Housing Fee Comparison – Non-Residential Projects (\$/SF)

	Warehouse	Industrial / Manufacturing	Commercial	R&D	Office	Hotel
County of Sacramento, Rancho Cordova, and Citrus Heights ⁽¹⁾	\$0.26	\$0.61	\$0.77	\$0.82	\$0.97	\$0.92
City of Sacramento	\$0.76	\$1.73	\$2.22	N/A	\$2.76	\$2.63
Folsom ⁽²⁾	\$1.70	\$1.70	\$1.70	\$1.70	\$1.70	\$1.70
Elk Grove	\$0.94	\$0.88	\$0.78	N/A	None	\$2.29
Placer County: Tahoe / Sierra Nevada ⁽³⁾	exempt	\$2.00	\$2.00	\$2.00	\$2.00	\$2.00
%Difference v. County						
City of Sacramento	292%	284%	288%	N/A	285%	286%
Folsom ⁽²⁾	654%	279%	221%	207%	175%	185%
Elk Grove	362%	144%	101%	N/A	(100%)	249%
Placer County: Tahoe / Sierra Nevada ⁽³⁾	(100%)	328%	260%	244%	206%	217%
Other Counties						
San Mateo	N/A	N/A	\$5.00	N/A	\$25.00	\$10.00
Marin	\$1.94	\$3.74	\$5.40	\$7.19	\$7.19	\$3.00
Santa Cruz	\$3.00	\$3.00	\$3.00	\$3.00	\$3.00	\$3.00
Sonoma	\$3.01	\$3.01	\$5.05	\$3.01	\$2.92	\$2.92
Napa	\$3.60	\$4.50	\$7.50	N/A	\$5.25	\$9.00
San Luis Obispo	\$0.58	\$0.58	\$1.36	N/A	\$0.96	\$1.44

Source: KMA survey conducted in FY 20-21. Fees have not been updated based on application of annual indexes or other updates after the date of review. For use other than general comparison, please consult the code and staff of the applicable jurisdiction.

(1) Rancho Cordova and Citrus Heights have fees identical to the County.

(2) 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

(3) County staff indicate that countywide fees will be considered in 2021. Exemption for commercial within vertical mixed use development with residential above.

N/A indicates that the program does not have a separate fee category for the identified use.

Appendix B provides information on other linkage fee programs throughout the State.

3.5 Comparison of Total Fee and Permit Costs to Other Jurisdictions

Affordable housing fees represent a relatively small share of all development fees and permits that non-residential developers must pay prior to building permit issuance. As context for consideration of a potential increase in the County's affordable housing fees, KMA compared total fees applicable to development in the County to five nearby jurisdictions that are potential competitive locations for the types of development occurring in the County:

- City of Sacramento (Southeast Sacramento and Sacramento Railyards)
- Rancho Cordova (Zinfandel and Sunridge Specific Plan Area)
- Elk Grove (Southeast Elk Grove and Laguna)

- West Sacramento (Southport Industrial Park and the Washington District)
- Placer County (Sunset Industrial Area).

KMA prepared fee estimates for each of the development prototypes identified in Section 3.3 based on published fee schedules, input from the staff of local agencies, and review of a prior fee study. The fee estimates include affordable housing impact fees, other impact fees, such as traffic impact fees, as well as permit processing and inspection costs paid prior to building permit issuance.¹ The fee estimates also encompass area-specific fees applicable to sub-area(s) within each jurisdiction, selected as representative of where development has occurred or is expected to occur in the future.

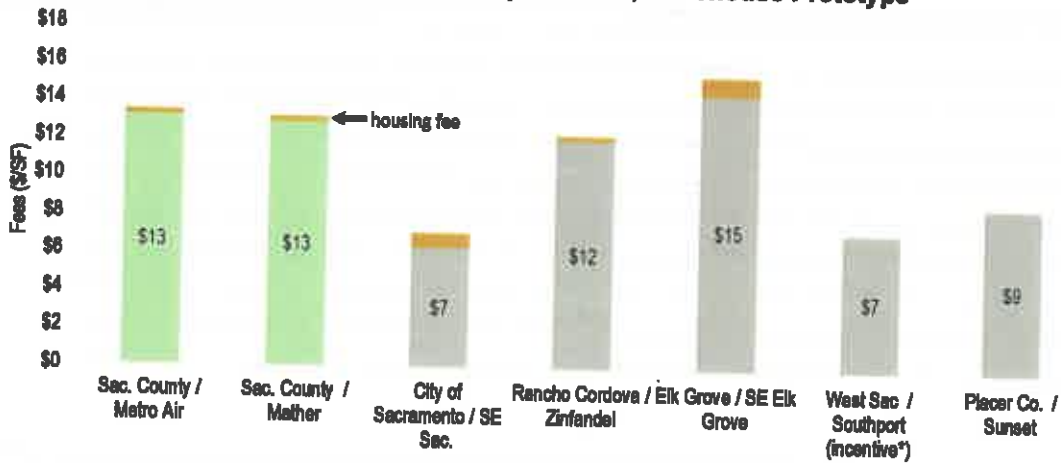
Figure 3-3 through Figure 3-7 depict total fees per square foot applicable to development in the County versus nearby jurisdictions. The figures show that total development fees tend to be lower for low-intensity warehouse and industrial development prototypes (ranging from \$7 to \$16/square foot) and higher for office, commercial, and hotel prototypes (ranging from \$16 to \$40/square foot). The housing fee represents between 2% and 4% of the total fee stack for the unincorporated County, depending on the development type, and is separately illustrated in Figures 3-3 to 3-7 and Appendix Table 5. The housing fee as a percent of the total fee stack for each of the surveyed jurisdictions is calculated in Appendix Table 15.

In terms of the competitive landscape, total development fees for industrial/warehouse and light industrial are higher in Sacramento County than the comparison jurisdictions except for Elk Grove. Retail fees in Sacramento County are higher than the comparison jurisdictions other than Rancho Cordova's Sunridge Specific Plan Area. For office and hotel, Sacramento County's fees fall towards the middle of the range of the comparison jurisdictions.

The total development fee burden is one of many factors that non-residential developers and end users may consider in assessing potential development sites. Other important factors include land costs, infrastructure capacity, and proximity to labor and customers. As described in Section 3-2, over the last several years, the County has attracted several large industrial development projects, despite having higher warehouse development fees than many comparison jurisdictions.

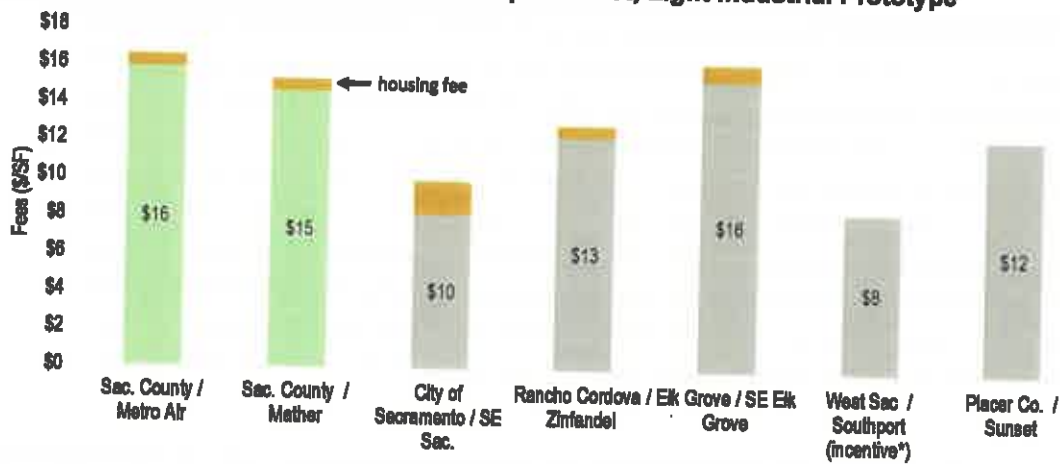
¹ Ongoing special assessments and taxes that do not represent an upfront cost to the development project are not considered in the fee comparison.

Figure 3-3 –Total Development Fees Per Square Foot, Warehouse Prototype



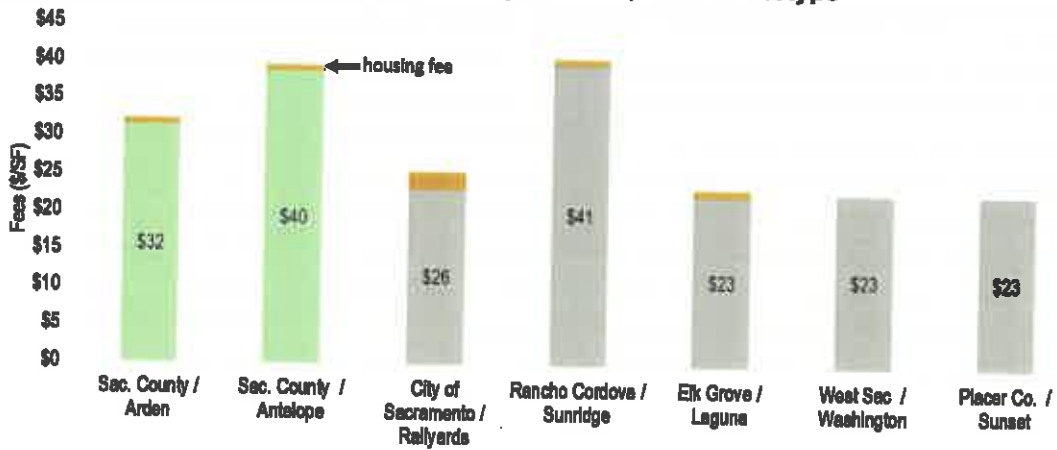
Source: KMA survey. See Appendix A Table 6 for detailed breakout of development fees.
 * Based on "Negotiated Impact Fee Package" available to the Southport Industrial Park.

Figure 3-4 –Total Development Fees Per Square Foot, Light Industrial Prototype



Source: KMA survey. See Appendix A Table 7 for detailed breakout of development fees.
 * Based on "Negotiated Impact Fee Package" available to the Southport Industrial Park.

Figure 3-5 –Total Development Fees Per Square Foot, Retail Prototype



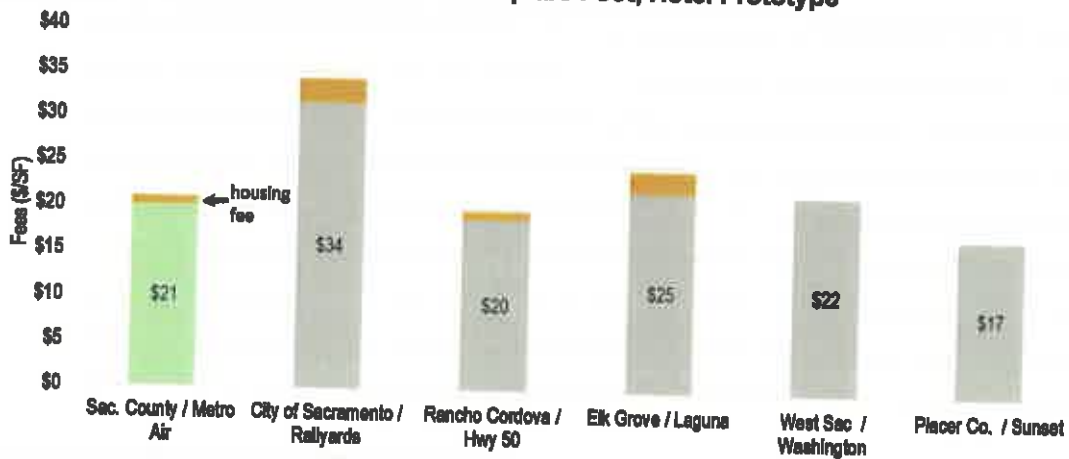
Source: KMA survey. See Appendix A Table 8 for detailed breakout of development fees.

Figure 3-6 –Total Development Fees Per Square Foot, Office Prototype



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

Figure 3-7 –Total Development Fees Per Square Foot, Hotel Prototype



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

3.6 Illustration of Affordable Housing Fees If Index Had Been Applied

The County's Housing Trust Fund ordinance includes a provision for indexing the fee to account for increases in the cost of constructing affordable housing over time. Historic data for the specific index referenced in the County code was not accessible to KMA. The Engineering News Record Building Cost Index (20-City Average), currently in use for the County's residential affordable housing fees, is applied to illustrate fees reflective of indexing for cost escalation since 1992. If this index had been applied, fees would have increased 247% over the period to the levels indicated in Table 3-7.

Table 3-7 – Illustrative Fee Level if Indexed for Change in Costs Since 1992

	Current Fee Level	Illustrative Fee Level With Indexing for Change in Construction Cost Since 1992
Office	\$0.97	\$2.39
Hotel	\$0.92	\$2.27
R&D	\$0.82	\$2.02
Commercial	\$0.77	\$1.90
Manufacturing	\$0.61	\$1.51
Warehouse	\$0.26	\$0.64

Note: Based on change in the Building Cost Index 20-City Average published by Engineer News-Record / McGraw Hill from July 1992 through July 2021.

Appendix A – Supporting Technical Tables
Non-Residential Development Costs and Fee Comparison

**Appendix A Table 1
 Non-Residential Development Prototypes
 Updated Housing Trust Fund Nexus - Context Materials
 Sacramento County, CA**

Non-Residential Prototype	Warehouse / Distribution	Light Industrial	Retail	Office	Hotel
Gross Building Area FAR Land Area Building Floors Hotel Rooms Parking	500,000 sf 0.40 FAR 28.7 acres 1 floor n/a Surface	100,000 sf 0.40 FAR 5.7 acres 1 floor n/a Surface	20,000 sf 0.25 FAR 1.8 acres 1 floor n/a Surface	50,000 sf 0.50 FAR 2.3 acres 2 floors n/a Surface	65,000 sf 0.80 FAR 1.9 acres 4 floors 105 rooms 620sf/rm Surface
<u>Representative Subareas⁽¹⁾</u> a) Metro Air Park b) Mather c) Arden-Arcade d) Antelope	x x	x x	x x	x x	x

⁽¹⁾ Subareas will inform the fee comparison with nearby jurisdictions.

**Appendix A Table 2
 Estimated Development Costs of Non-Residential Development Prototypes
 Updated Housing Trust Fund Nexus - Context Materials
 Sacramento County, CA**

Non-Residential Prototype	Warehouse/Distribution	Light Industrial	Retail	Office	Hotel
Gross Building Area	500,000 sf	100,000 sf	20,000 sf	50,000 sf	65,000 sf
FAR	0.40 FAR	0.40 FAR	0.25 FAR	0.50 FAR	0.80 FAR
Land Area	28.7 acres	5.7 acres	1.8 acres	2.3 acres	1.9 acres
	\$/SF	\$/SF	\$/SF	\$/SF	\$/SF
Land Acquisition (1)	\$13 \$6,250,000 \$5 /land sf	\$13 \$1,250,000 \$5 /land sf	\$60 \$1,200,000 \$15 /land sf	\$20 \$1,000,000 \$10 /land sf	\$14 \$8 \$11 /land sf
Directs (2)	\$95 \$47,500,000	\$120 \$12,000,000	\$175 \$3,500,000	\$160 \$8,000,000	\$185 \$115 \$12,030,000
Indirects					
A&E	\$3 \$1,660,000	\$4 \$420,000	\$9 \$180,000	\$8 \$400,000	\$7 \$5 \$480,000
FF&E/Tenant Improvements	\$5 \$2,500,000	\$8 \$750,000	\$38 \$760,000	\$29 \$1,430,000	\$28 \$17 \$1,800,000
Permits & Fees (2)	\$11 \$5,487,000	\$13 \$1,319,000	\$35 \$703,000	\$22 \$1,122,000	\$19 \$12 \$1,234,000
Other Indirects & Financing	\$13 \$6,340,000	\$16 \$1,570,000	\$32 \$630,000	\$24 \$1,200,000	\$25 \$16 \$1,640,000
Total Indirects & Financing	\$32 \$15,987,000	\$41 \$4,059,000	\$114 \$2,273,000	\$83 \$4,152,000	\$79 \$49 \$5,154,000
Total Costs	\$139 \$69,737,000	\$173 \$17,309,000	\$349 \$6,973,000	\$263 \$13,152,000	\$278 \$172 \$18,074,000
Total Cost Range (+/-10%)	\$125-\$155/sf	\$155-\$190/sf	\$315-\$385/sf	\$235-\$290/sf	\$250-\$305/sf

(1) Land acquisition costs estimated based on recent land sale comps adjusted for building FAR. (See Tables 11 to 13)
 (2) Direct construction cost estimates from RS Means and other project pro formas.

(3) Permits & Fees excluding housing trust fee.

**Appendix A Table 3
 Fees as % of Average Total Development Cost
 Updated Housing Trust Fund Nexus - Context Materials
 Sacramento County, CA**

Fees as % of Total Development Cost		Illustrative Linkage Fees (\$/GSF) as a Percent of Total Dev Cost									
Total Dev Cost		\$0.50	\$1	\$2	\$3	\$4	\$5	\$6	Current Fee		
	Per GSF								% of cost	fee	
Warehouse/ Distribution	\$139/GSF	0.36%	0.72%	1.43%	2.15%	2.87%	3.58%	4.30%	0.19%	\$0.26	
Light Industrial	\$173/GSF	0.29%	0.58%	1.16%	1.73%	2.31%	2.89%	3.47%	0.35%	\$0.61	
Retail	\$349/GSF	0.14%	0.29%	0.57%	0.86%	1.15%	1.43%	1.72%	0.22%	\$0.77	
Office	\$263/GSF	0.19%	0.38%	0.76%	1.14%	1.52%	1.90%	2.28%	0.37%	\$0.97	
Hotel	\$278/GSF	0.18%	0.36%	0.72%	1.08%	1.44%	1.80%	2.16%	0.33%	\$0.92	

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

**Appendix A Table 4
Geographies for Fee Comparison
Updated Housing Trust Fund Nexus - Context Materials
Sacramento County, CA**

Geography/ Subarea	Warehouse/ Distribution	Light Industrial	Retail	Office	Hotel
Sacramento County					
a) Metro Air Park	X	X		X	X
b) Mather	X	X			
c) Arden-Arcade			X	X	
d) Antelope			X		
<u>Comparison Jurisdictions</u>					
1) City of Sacramento					
a) SE Sacramento	X	X			
b) Railyards			X	X	X
2) Rancho Cordova					
a) Zinfandel SPA	X	X			
b) Hwy 50 Corridor			X	X	X
b) Sunrise SP			X		
3) Elk Grove					
a) SE Elk Grove	X	X			
b) Laguna/ Hwy 99			X	X	X
4) West Sacramento					
a) Southport	X	X			
b) Washington SP			X	X	X
5) Placer County					
a) Sunset Area	X	X	X	X	X

**Appendix A Table 5
Development Fee Comparison Summary
Updated Housing Trust Fund Nexus - Context Materials
Sacramento County, CA**

	Sacramento County	Sacramento County	City of Sacramento	Rancho Cordova	Elk Grove	West Sacramento	Placer County ⁽¹⁾
Warehouse (Table 6)							
Subarea	Metro Air	Mather	SE Sac.	Zinfandel	SE Elk Grove	Southport	Sunset
GBA	500,000	500,000	500,000	500,000	500,000	500,000	500,000
Fees PSF, Excl. Affordable	\$13.19	\$12.89	\$6.30	\$12.02	\$14.52	\$7.22	\$8.88
Affordable Hsg. Fee PSF	\$0.26	\$0.26	\$0.76	\$0.26	\$0.94	\$0.00	\$0.00
Light Industrial (Table 7)							
Subarea	Metro Air	Mather	SE Sac.	Zinfandel	SE Elk Grove	Southport	Sunset
GBA	100,000	100,000	100,000	100,000	100,000	100,000	100,000
Fees PSF, Excl. Affordable	\$15.87	\$14.65	\$8.17	\$12.30	\$15.38	\$8.47	\$12.42
Affordable Hsg. Fee PSF	\$0.61	\$0.61	\$1.73	\$0.61	\$0.88	\$0.00	\$0.00
Retail (Table 8)							
Subarea	Arden	Antelope	Railyards	Sunridge	Laguna	Washington	Sunset
GBA	20,000	20,000	20,000	20,000	20,000	20,000	20,000
Fees PSF, Excl. Affordable	\$31.57	\$38.74	\$23.29	\$39.79	\$22.63	\$23.04	\$22.90
Affordable Hsg. Fee PSF	\$0.77	\$0.77	\$2.22	\$0.77	\$0.78	\$0.00	\$0.00
Office (Table 9)							
Subarea	Metro Air	Arden	Railyards	Hwy 50	Laguna	Washington	Sunset
GBA	50,000	50,000	50,000	50,000	50,000	50,000	50,000
Fees PSF, Excl. Affordable	\$20.73	\$25.97	\$31.89	\$17.03	\$16.88	\$25.73	\$26.51
Affordable Hsg. Fee PSF	\$0.97	\$0.97	\$2.76	\$0.97	\$0.00	\$0.00	\$0.00
Hotel (Table 10)							
Subarea	Metro Air		Railyards	Hwy 50	Laguna	Washington	Sunset
GBA	65,000		65,000	65,000	65,000	65,000	65,000
Fees PSF, Excl. Affordable	\$20.13		\$31.68	\$18.03	\$18.96	\$21.90	\$17.44
Affordable Hsg. Fee PSF	\$0.92		\$2.63	\$0.92	\$2.29	\$0.00	\$0.00

Source: Fee schedules for selected jurisdictions and "Development Exactions Comparison" prepared by Willdan Financial Services (January 2019).
 Note: Comparison does not reflect other development exactions such as special assessments and special taxes.

(1) Excludes proposed, but not adopted fees to fund infrastructure in support of the Sunset Area Plan (preliminary estimates range from \$7-\$20/SF)

**Appendix A Table 6
Warehouse Fee Comparison
Updated Housing Trust Fund Nexus - Context Materials
Sacramento County, CA**

	Sacramento County	Sacramento County	City of Sacramento	Rancho Cordova	Elk Grove	West Sacramento w/ Incentive ⁽¹⁾	Placer County ⁽⁴⁾
Subarea GBA	Metro Air 500,000	Mather 500,000	SE Sac. 500,000	Zinfandel 500,000	SE Elk Grove 500,000	Southport 500,000	Sunset 500,000
Total Fees							
Processing Fees ⁽¹⁾	\$765,000	\$765,000	\$956,250	\$403,750	\$425,000	\$692,223	\$212,500
Impact Fees ⁽²⁾							
Water	\$164,134	\$358,139	\$12,565	\$0	\$358,139	\$8,451	\$154,712
Drainage	\$0	\$694,071	\$0	\$694,071	\$694,071	\$232,499	\$0
Sewer	\$892,304	\$748,454	\$180,278	\$308,917	\$452,787	\$241,136	\$475,146
Flood Control	\$570,000	\$0	\$570,000	\$0	\$0	\$756,000	\$0
Roads/Transit	\$984,741	\$672,000	\$1,067,150	\$3,092,000	\$4,143,500	\$1,015,004	\$2,159,150
Fire	\$303,500	\$303,500	\$0	\$303,500	\$290,000	\$42,311	\$175,000
Parks	\$0	\$0	\$95,000	\$0	\$0	\$80,478	\$0
School District	\$330,000	\$330,000	\$270,000	\$330,000	\$330,000	\$0	\$330,000
Other Capital Facilities	\$0	\$0	\$0	\$110,000	\$290,000	\$96,334	\$75,000
Childcare	\$0	\$0	\$0	\$0	\$0	\$16,096	\$0
Plan Area	\$1,438,103	\$1,655,000	\$0	\$210,000	\$275,000	\$2,143	\$0
Habitat Conservation ⁽⁵⁾	\$1,148,760	\$918,274	\$0	\$556,531	\$0	\$429,008	\$759,671
Total, Before Affordable Hsg.	\$6,596,542	\$6,444,438	\$3,151,243	\$8,008,769	\$7,258,477	\$3,611,679	\$4,341,178
Affordable Housing	\$130,000	\$130,000	\$380,000	\$130,000	\$470,000	\$0	\$0
Fees Per Square Foot							
Processing Fees ⁽¹⁾	\$1.53	\$1.53	\$1.91	\$0.81	\$0.85	\$1.38	\$0.43
Impact Fees ⁽²⁾							
Water	\$0.33	\$0.72	\$0.03	\$0.00	\$0.72	\$0.02	\$0.31
Drainage	\$0.00	\$1.39	\$0.00	\$1.39	\$1.39	\$0.46	\$0.00
Sewer	\$1.78	\$1.50	\$0.36	\$0.62	\$0.91	\$0.48	\$0.95
Flood Control	\$1.14	\$0.00	\$1.14	\$0.00	\$0.00	\$1.51	\$0.00
Roads/Transit	\$1.97	\$1.34	\$2.13	\$6.18	\$8.29	\$2.03	\$4.32
Fire	\$0.61	\$0.61	\$0.00	\$0.61	\$0.58	\$0.08	\$0.35
Parks	\$0.00	\$0.00	\$0.19	\$0.00	\$0.00	\$0.18	\$0.00
School District	\$0.66	\$0.66	\$0.54	\$0.66	\$0.66	\$0.00	\$0.66
Other Capital Facilities	\$0.00	\$0.00	\$0.00	\$0.22	\$0.58	\$0.19	\$0.15
Childcare	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.03	\$0.00
Plan Area	\$2.88	\$3.31	\$0.00	\$0.42	\$0.55	\$0.00	\$0.00
Habitat Conservation ⁽⁵⁾	\$2.30	\$1.84	\$0.00	\$1.11	\$0.00	\$0.86	\$1.52
Total, Before Affordable Hsg.	\$13.19	\$12.89	\$6.30	\$12.02	\$14.52	\$7.22	\$8.88
Affordable Housing	\$0.26	\$0.26	\$0.78	\$0.26	\$0.94	\$0.00	\$0.00

Note: Comparison does not reflect other development exactions such as special assessments and special taxes.

⁽¹⁾ Based on processing fees as percentage of the building permit valuation derived from "Development Exactions Comparison" prepared by Wildan Financial Services (2011)

⁽²⁾ Based on fee schedules for selected jurisdictions.

⁽³⁾ Based on "Negotiated Impact Fee Package" available to the Southport Industrial Park. Fees by category are estimates assume a uniform % reduction to standard city fee

⁽⁴⁾ Excludes proposed, but not adopted fees to fund infrastructure in support of the Sunset Area Plan (estimated at \$7/SF in draft public facilities financing plan)

⁽⁵⁾ Reflects base land conversion fee for habitat conservation plan areas, excluding additional fees for wetlands.

Mather habitat fee is a rough estimate based on the South Sac. HCP fees which are not applicable to Mather, and not necessarily representative of the actual mitigation cost

**Appendix A Table 7
Light Industrial Fee Comparison
Updated Housing Trust Fund Nexus - Context Materials
Sacramento County, CA**

	Sacramento County	Sacramento County	City of Sacramento	Rancho Cordova	Elk Grove	West Sacramento w/ Incentive⁽¹⁾	Placer County⁽⁴⁾
Subarea GBA	Metro Air 100,000	Mather 100,000	SE Sac. 100,000	Zinfandel 100,000	SE Elk Grove 100,000	Southport 100,000	Sunset 100,000
Total Fees							
Processing Fees⁽¹⁾	\$207,000	\$207,000	\$258,750	\$109,250	\$115,000	\$187,308	\$57,500
Impact Fees⁽²⁾							
Water	\$34,129	\$127,951	\$12,565	\$0	\$127,951	\$5,193	\$154,712
Drainage	\$0	\$138,814	\$0	\$138,814	\$138,814	\$28,573	\$0
Sewer	\$178,461	\$149,691	\$36,198	\$61,783	\$90,553	\$43,521	\$95,029
Flood Control	\$114,000	\$0	\$114,000	\$0	\$0	\$151,200	\$0
Roads/Transit	\$408,894	\$200,400	\$322,250	\$618,400	\$828,700	\$316,603	\$633,191
Fire	\$60,700	\$60,700	\$0	\$60,700	\$58,000	\$5,200	\$35,000
Parks	\$0	\$0	\$19,000	\$0	\$0	\$9,890	\$0
School District	\$66,000	\$66,000	\$54,000	\$66,000	\$66,000	\$0	\$66,000
Other Capital Facilities	\$0	\$0	\$0	\$22,000	\$58,000	\$11,839	\$49,000
Childcare	\$0	\$0	\$0	\$0	\$0	\$1,978	\$0
Plan Area	\$287,621	\$331,000	\$0	\$42,000	\$55,000	\$263	\$0
Habitat Conservation ⁽⁵⁾	\$229,752	\$183,655	\$0	\$111,306	\$0	\$85,801	\$151,934
Total, Before Affordable Hsg.	\$1,586,557	\$1,465,211	\$816,783	\$1,230,254	\$1,538,019	\$847,369	\$1,242,366
Affordable Housing	\$61,000	\$61,000	\$173,000	\$61,000	\$88,000	\$0	\$0
Fees Per Square Foot							
Processing Fees⁽¹⁾	\$2.07	\$2.07	\$2.59	\$1.09	\$1.15	\$1.87	\$0.58
Impact Fees⁽²⁾							
Water	\$0.34	\$1.28	\$0.13	\$0.00	\$1.28	\$0.05	\$1.55
Drainage	\$0.00	\$1.39	\$0.00	\$1.39	\$1.39	\$0.29	\$0.00
Sewer	\$1.78	\$1.50	\$0.36	\$0.62	\$0.91	\$0.44	\$0.95
Flood Control	\$1.14	\$0.00	\$1.14	\$0.00	\$0.00	\$1.51	\$0.00
Roads/Transit	\$4.09	\$2.00	\$3.22	\$6.18	\$8.29	\$3.17	\$6.33
Fire	\$0.81	\$0.61	\$0.00	\$0.61	\$0.58	\$0.05	\$0.35
Parks	\$0.00	\$0.00	\$0.19	\$0.00	\$0.00	\$0.10	\$0.00
School District	\$0.66	\$0.66	\$0.54	\$0.66	\$0.66	\$0.00	\$0.66
Other Capital Facilities	\$0.00	\$0.00	\$0.00	\$0.22	\$0.58	\$0.12	\$0.49
Childcare	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.02	\$0.00
Plan Area	\$2.88	\$3.31	\$0.00	\$0.42	\$0.55	\$0.00	\$0.00
Habitat Conservation ⁽⁵⁾	\$2.30	\$1.84	\$0.00	\$1.11	\$0.00	\$0.86	\$1.52
Total, Before Affordable Hsg.	\$15.87	\$14.65	\$8.17	\$12.30	\$15.38	\$8.47	\$12.42
Affordable Housing	\$0.61	\$0.61	\$1.73	\$0.61	\$0.88	\$0.00	\$0.00

Note: Comparison does not reflect other development exactions such as special assessments and special taxes.

⁽¹⁾ Based on processing fees as percentage of the building permit valuation derived from "Development Exactions Comparison" prepared by Wilden Financial Services (2019).

⁽²⁾ Based on fee schedules for selected jurisdictions.

⁽³⁾ Based on "Negotiated Impact Fee Package" available to the Southport Industrial Park. Fees by category are estimates assume a uniform % reduction to standard city fees.

⁽⁴⁾ Excludes proposed, but not adopted fees to fund infrastructure in support of the Sunset Area Plan (estimated at \$7/SF in draft public facilities financing plan)

⁽⁵⁾ Reflects base land conversion fee for habitat conservation plan areas, excluding additional fees for wetlands.

Mather habitat fee is a rough estimate based on the South Sac. HCP fees which are not applicable to Mather, and not necessarily representative of the actual mitigation cost.

**Appendix A Table 8
Retail Fee Comparison
Updated Housing Trust Fund Nexus - Context Materials
Sacramento County, CA**

	Sacramento County	Sacramento County	City of Sacramento	Rancho Cordova	Elk Grove	West Sacramento	Placer County ⁽³⁾
Subarea	Arden 20,000	Antelope 20,000	Railyards 20,000	Sunridge 20,000	Laguna 20,000	Washington 20,000	Sunset 20,000
Total Fees							
Processing Fees ⁽¹⁾	\$46,250	\$46,250	\$57,500	\$25,000	\$27,500	\$46,987	\$14,550
Impact Fees ⁽²⁾							
Water	\$32,452	\$32,452	\$12,585	\$18,415	\$88,819	\$53,032	\$154,712
Drainage	\$29,146	\$43,359	\$0	\$43,612	\$43,612	\$0	\$0
Sewer	\$15,448	\$49,333	\$7,490	\$15,448	\$21,202	\$37,904	\$57,038
Flood Control	\$31,400	\$0	\$31,400	\$0	\$0	\$13,420	\$0
Roads/Transit	\$441,300	\$316,700	\$68,250	\$252,500	\$194,700	\$177,557	\$150,537
Fire	\$13,500	\$13,500	\$0	\$13,500	\$36,000	\$15,920	\$7,000
Parks	\$9,800	\$0	\$3,400	\$0	\$0	\$29,000	\$0
School District	\$12,200	\$12,200	\$10,800	\$13,200	\$13,200	\$13,200	\$13,200
Other Capital Facilities	\$0	\$0	\$0	\$10,200	\$27,600	\$36,260	\$12,400
Childcare	\$0	\$0	\$0	\$0	\$0	\$10,120	\$0
Plan Area	\$0	\$261,094	\$274,400	\$368,400	\$0	\$0	\$0
Habitat Conservation ⁽⁴⁾	\$0	\$0	\$0	\$35,618	\$0	\$27,456	\$48,619
Total, Before Affordable Hsg.	\$631,496	\$774,887	\$465,805	\$795,894	\$452,634	\$460,836	\$458,057
Affordable Housing	\$15,400	\$15,400	\$44,400	\$15,400	\$15,800	\$0	\$0
Fees Per Square Foot							
Processing Fees ⁽¹⁾	\$2.31	\$2.31	\$2.88	\$1.25	\$1.38	\$2.35	\$0.73
Impact Fees ⁽²⁾							
Water	\$1.62	\$1.62	\$0.63	\$0.92	\$4.44	\$2.65	\$7.74
Drainage	\$1.46	\$2.17	\$0.00	\$2.18	\$2.18	\$0.00	\$0.00
Sewer	\$0.77	\$2.47	\$0.37	\$0.77	\$1.06	\$1.90	\$2.85
Flood Control	\$1.57	\$0.00	\$1.57	\$0.00	\$0.00	\$0.67	\$0.00
Roads/Transit	\$22.07	\$15.84	\$3.41	\$12.63	\$9.74	\$8.88	\$7.53
Fire	\$0.68	\$0.68	\$0.00	\$0.68	\$1.80	\$0.80	\$0.35
Parks	\$0.49	\$0.00	\$0.17	\$0.00	\$0.00	\$1.45	\$0.00
School District	\$0.61	\$0.61	\$0.54	\$0.66	\$0.66	\$0.66	\$0.66
Other Capital Facilities	\$0.00	\$0.00	\$0.00	\$0.51	\$1.38	\$1.81	\$0.62
Childcare	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.51	\$0.00
Plan Area	\$0.00	\$13.05	\$13.72	\$18.42	\$0.00	\$0.00	\$0.00
Habitat Conservation ⁽⁴⁾	\$0.00	\$0.00	\$0.00	\$1.78	\$0.00	\$1.37	\$2.43
Total, Before Affordable Hsg.	\$31.57	\$38.74	\$23.29	\$39.79	\$22.63	\$23.04	\$22.90
Affordable Housing	\$0.77	\$0.77	\$2.22	\$0.77	\$0.78	\$0.00	\$0.00

Note: Comparison does not reflect other development exactions such as special assessments and special taxes.

⁽¹⁾ Based on processing fees as percentage of the building permit valuation derived from "Development Exactions Comparison" prepared by Wildan Financial Services (2019).

⁽²⁾ Based on fee schedules for selected jurisdictions.

⁽³⁾ Excludes proposed, but not adopted fees to fund infrastructure in support of the Sunset Area Plan (estimated at \$20/SF in draft public facilities financing plan)

⁽⁴⁾ Reflects base land conversion fee for habitat conservation plan areas, excluding additional fees for wetlands.

**Appendix A Table 9
Office Fee Comparison
Updated Housing Trust Fund Nexus - Context Materials
Sacramento County, CA**

	Sacramento County	Sacramento County	City of Sacramento	Rancho Cordova	Elk Grove	West Sacramento	Placer County⁽³⁾
Subarea GBA	Metro Air 50,000	Arden 50,000	Railyards 50,000	Hwy 50 50,000	Laguna 50,000	Washington 50,000	Sunset 50,000
Total Fees							
Processing Fees ⁽¹⁾	\$142,500	\$142,500	\$172,500	\$75,000	\$75,000	\$139,417	\$40,851
Impact Fees ⁽²⁾							
Water	\$14,628	\$32,452	\$12,565	\$0	\$93,423	\$53,032	\$154,712
Drainage	\$0	\$36,433	\$0	\$54,516	\$54,516	\$0	\$0
Sewer	\$110,258	\$46,325	\$37,448	\$46,325	\$75,095	\$131,920	\$142,596
Flood Control	\$39,250	\$39,250	\$39,250	\$0	\$0	\$21,700	\$0
Roads/Transit	\$241,795	\$875,500	\$81,900	\$500,000	\$335,350	\$505,084	\$826,270
Fire	\$56,000	\$56,000	\$0	\$56,000	\$90,000	\$66,250	\$17,500
Parks	\$0	\$39,500	\$13,000	\$0	\$0	\$117,000	\$0
School District	\$33,000	\$30,500	\$27,000	\$33,000	\$33,000	\$33,000	\$33,000
Other Capital Facilities	\$0	\$0	\$0	\$42,000	\$87,500	\$150,950	\$50,000
Childcare	\$0	\$0	\$0	\$0	\$0	\$33,750	\$0
Plan Area	\$307,362	\$0	\$1,211,000	\$0	\$0	\$0	\$0
Habitat Conservation ⁽⁴⁾	\$91,901	\$0	\$0	\$44,522	\$0	\$34,320	\$60,774
Total, Before Affordable Hsg. Affordable Housing	\$1,036,695 \$48,500	\$1,298,460 \$48,500	\$1,594,663 \$138,000	\$851,363 \$48,500	\$843,884 \$0	\$1,286,423 \$0	\$1,325,702 \$0
Fees Per Square Foot							
Processing Fees ⁽¹⁾	\$2.85	\$2.85	\$3.45	\$1.50	\$1.50	\$2.79	\$0.82
Impact Fees ⁽²⁾							
Water	\$0.29	\$0.65	\$0.25	\$0.00	\$1.87	\$1.06	\$3.09
Drainage	\$0.00	\$0.73	\$0.00	\$1.09	\$1.09	\$0.00	\$0.00
Sewer	\$2.21	\$0.93	\$0.75	\$0.93	\$1.50	\$2.64	\$2.85
Flood Control	\$0.79	\$0.79	\$0.79	\$0.00	\$0.00	\$0.43	\$0.00
Roads/Transit	\$4.84	\$17.51	\$1.64	\$10.00	\$8.71	\$10.10	\$16.53
Fire	\$1.12	\$1.12	\$0.00	\$1.12	\$1.80	\$1.33	\$0.35
Parks	\$0.00	\$0.79	\$0.26	\$0.00	\$0.00	\$2.34	\$0.00
School District	\$0.66	\$0.61	\$0.54	\$0.66	\$0.66	\$0.66	\$0.66
Other Capital Facilities	\$0.00	\$0.00	\$0.00	\$0.84	\$1.75	\$3.02	\$1.00
Childcare	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.68	\$0.00
Plan Area	\$6.15	\$0.00	\$24.22	\$0.00	\$0.00	\$0.00	\$0.00
Habitat Conservation ⁽⁴⁾	\$1.84	\$0.00	\$0.00	\$0.89	\$0.00	\$0.69	\$1.22
Total, Before Affordable Hsg. Affordable Housing	\$20.73 \$0.97	\$25.97 \$0.97	\$31.89 \$2.76	\$17.03 \$0.97	\$16.88 \$0.00	\$25.73 \$0.00	\$26.51 \$0.00

Note: Comparison does not reflect other development exactions such as special assessments and special taxes.

⁽¹⁾ Based on processing fees as percentage of the building permit valuation derived from "Development Exactions Comparison" prepared by Wildan Financial Services (2019).

⁽²⁾ Based on fee schedules for selected jurisdictions.

⁽³⁾ Excludes proposed, but not adopted fees to fund infrastructure in support of the Sunset Area Plan (estimated at \$12/SF in draft public facilities financing plan)

⁽⁴⁾ Reflects base land conversion fee for habitat conservation plan areas, excluding additional fees for wetlands.

Appendix A Table 10
 Hotel Fee Comparison
 Updated Housing Trust Fund Nexus - Context Materials
 Sacramento County, CA

	Sacramento County	City of Sacramento	Rancho Cordova	Elk Grove	West Sacramento	Fleecer County ⁽³⁾
Subarea	Metro Air	Railyards	Hwy 50	Laguna	Washington	Sunset
GBA	65,000	65,000	65,000	65,000	65,000	65,000
Total Fees	\$185,250	\$224,250	\$97,500	\$97,500	\$181,242	\$56,745
Processing Fees ⁽¹⁾	\$12,191	\$12,565	\$0	\$88,107	\$63,032	\$154,712
Impact Fees ⁽²⁾	\$0	\$0	\$44,294	\$44,294	\$0	\$0
Water	\$309,061	\$157,280	\$102,025	\$280,491	\$251,059	\$228,548
Drainage	\$25,513	\$25,513	\$0	\$0	\$43,615	\$0
Sewer	\$371,796	\$177,240	\$771,800	\$589,743	\$646,915	\$538,340
Flood Control	\$43,875	\$0	\$43,875	\$117,000	\$51,740	\$22,750
Roads/Transit	\$0	\$11,050	\$0	\$0	\$94,250	\$0
Fire	\$42,900	\$35,100	\$42,900	\$42,900	\$42,900	\$42,900
Parks	\$0	\$0	\$33,150	\$36,400	\$117,845	\$40,300
School District	\$0	\$0	\$0	\$0	\$13,130	\$0
Other Capital Facilities	\$243,455	\$1,416,188	\$0	\$0	\$0	\$0
Childcare	\$74,689	\$0	\$36,175	\$0	\$27,895	\$49,379
Plan Area	\$1,308,710	\$2,059,186	\$1,171,719	\$1,297,435	\$1,423,613	\$1,133,673
Habitat Conservation ⁽⁴⁾	\$59,800	\$170,950	\$59,800	\$148,850	\$0	\$0
Total, Before Affordable Hsg. Affordable Housing	\$2.85	\$3.45	\$1.50	\$1.50	\$2.79	\$0.87
Fees Per Square Foot	\$0.19	\$0.19	\$0.00	\$1.37	\$0.82	\$2.38
Processing Fees ⁽¹⁾	\$0.00	\$0.00	\$0.68	\$0.68	\$0.00	\$0.00
Impact Fees ⁽²⁾	\$4.75	\$2.42	\$1.57	\$4.32	\$3.86	\$3.52
Water	\$0.39	\$0.39	\$0.00	\$0.00	\$0.67	\$0.00
Drainage	\$5.72	\$2.73	\$11.87	\$9.07	\$8.41	\$8.28
Sewer	\$0.68	\$0.00	\$0.68	\$1.80	\$0.80	\$0.35
Flood Control	\$0.00	\$0.17	\$0.00	\$0.00	\$1.45	\$0.00
Roads/Transit	\$0.66	\$0.54	\$0.66	\$0.66	\$0.66	\$0.66
Fire	\$0.00	\$0.00	\$0.51	\$0.56	\$1.81	\$0.62
Parks	\$0.00	\$0.00	\$0.00	\$0.00	\$0.20	\$0.00
School District	\$3.75	\$21.79	\$0.00	\$0.00	\$0.00	\$0.00
Other Capital Facilities	\$1.15	\$0.00	\$0.56	\$0.00	\$0.43	\$0.76
Childcare	\$20.13	\$31.68	\$18.03	\$19.96	\$21.90	\$17.44
Plan Area	\$0.92	\$2.63	\$0.92	\$2.29	\$0.00	\$0.00
Habitat Conservation ⁽⁴⁾						
Total, Before Affordable Hsg. Affordable Housing						

Note: Comparison does not reflect other development exactions such as special assessments and special taxes.

⁽¹⁾ Based on processing fees as % of the building permit valuation derived from "Development Exactions Comparison" prepared by WJWien (2019).

⁽²⁾ Based on fee schedules for selected jurisdictions.

⁽³⁾ Excludes proposed, but not adopted fees to fund infrastructure in support of the Sunset Area Plan.

⁽⁴⁾ Reflects base land conversion fee for habitat conservation plan areas, excluding additional fees for wetlands.

**Appendix A Table 11
Industrial Land Sales (2017- 2020)
Updated Housing Trust Fund Nexus - Context Materials
Sacramento County, CA**

<u>Property</u>	<u>Acres</u>	<u>Zoning</u>	<u>Year Sold</u>	<u>Price (\$M)</u>	<u>Price /SF Land</u>
<u>Metro Air Park</u>					
Powerline Rd	85.5	SPA	2020	\$15.82	\$4.25
4740 W Elkhorn Blvd	14.5	SPA	2019	\$4.00	<u>\$6.34</u>
<i>Average</i>					<u>\$4.55</u>
<u>Mather</u>					
3960 Happy Ln	4.0	M-1	2019	\$1.38	\$7.91
Old Placerville Rd	1.8	M-1	2018	\$0.45	\$5.87
3730 Happy Ln	1.0	M-1	2018	\$0.27	\$6.08
Goethr Rd	8.4	MP	2017	\$2.09	\$5.70
3740-3750 Happy Ln	1.1	M-1	2017	\$0.27	<u>\$5.46</u>
<i>Average</i>					<u>\$6.27</u>
<u>Other Unincorporated Areas</u>					
2245 Cemo Cir	2.5	MP	2020	\$0.80	\$7.30
7041 Roseville Rd	6.8	M-1	2020	\$0.41	\$1.39
3100 51st Ave	14.5	M-1	2020	\$1.10	\$1.74
Mayhew Rd	4.0	M-1	2019	\$0.53	\$3.01
12545 Stockton Blvd	3.2	M-1	2019	\$0.50	\$3.58
12523 E Stockton Blvd	2.0	M-1	2019	\$0.31	\$3.54
Gerber & French Rd	8.4	RD-20	2019	\$1.10	\$3.01
28th And Q	10.0	M-1	2019	\$0.70	\$1.61
6830 28th St	8.9	SPA	2018	\$0.71	\$1.84
6th St W	90.0	M-2	2018	\$1.50	\$0.38
701 Straugh Rd	22.3	M-2	2018	\$0.38	\$0.39
Wilbur Way	12.9	M-1	2018	\$1.50	\$2.68
6815 Florin Perkins Rd	20.6	M-1	2018	\$2.05	\$2.29
6901 Florin Perkins Rd	10.8	M-1	2018	\$1.05	\$2.23
7445 Reese Rd	6.3	M-2	2018	\$1.34	\$4.89
Roseville Rd	8.6	M-1	2018	\$1.24	\$3.32
2440 Gold River Rd	1.4	MP	2018	\$0.24	\$3.86
3509 51st Ave	0.5	M-1	2018	\$0.12	\$5.94
6729 W 6th St	10.6	M-2	2018	\$0.50	\$1.09
6951 W 6th St	9.9	M-2	2018	\$0.38	\$0.87
Elkhorn Blvd & 32nd St	1.4	M-1	2017	\$0.31	\$5.17
3100 47th Ave	11.1	M-1	2017	\$1.25	\$2.59
Crn Elkhorn & Blacktop	1.6	M-2	2017	\$0.17	\$2.33
4616 Mayhew Rd	3.3	M-1	2017	\$0.40	\$2.76
9371 Jackson Rd	5.8	M-1	2017	\$0.97	\$3.86
6059 Bradshaw Rd	19.7	M-1	2017	\$1.15	<u>\$1.34</u>
<i>Average</i>					<u>\$1.60</u>

Appendix A Table 12
Retail Land Sales (2017- 2020)
Updated Housing Trust Fund Nexus - Context Materials
Sacramento County, CA

<u>Property</u>	<u>Acres</u>	<u>Zoning</u>	<u>Year Sold</u>	<u>Price (\$M)</u>	<u>Price /SF Land</u>
<u>Arden-Arcade</u>					
2201 Marconi Ave	0.5	LC	2019	\$0.32	\$15
2915 Fulton Ave	0.9	SPA	2017	\$0.74	<u>\$19</u>
<i>Average</i>					<u>\$18</u>
<u>Antelope</u>					
Antelope Rd	1.1	SC	2019	\$0.56	\$12
Walerga Rd/ Antelope Rd	2.1	SC	2018	\$1.18	\$13
5872 Antelope Rd	1.0	LC	2018	\$1.15	\$26
Antelope Rd	0.8	LC	2017	\$0.65	\$18
7681 Watt Ave	3.0	LC	2017	\$0.70	<u>\$5</u>
<i>Average</i>					<u>\$12</u>
<u>Carmichael</u>					
5924-5930 Don Way	0.5	GC	2019	\$0.16	\$8
5900 Winding Way	24.5	RD-40	2019	\$3.48	\$3
Marshall/ Fair Oaks Blvd	4.7	SPA	2019	\$0.80	\$4
9047 Fair Oaks Blvd	0.4	LC	2017	\$0.10	<u>\$6</u>
<i>Average</i>					<u>\$3</u>
<u>Other Unincorporated Areas</u>					
4705 Auburn Blvd	1.1	GC	2020	\$1.00	\$22
9956-9998 Fair Oaks Blvd	1.3	SPA	List	\$0.90	\$15
5601 Florin Rd	1.0	SC	2019	\$1.20	\$28
Gerber Rd	1.7	SC	2019	\$1.00	\$14
8055 Orchard Loop Ln	0.8	SPA	2019	\$0.33	\$10
NEQ Hwy 99 & Mack Rd	6.9	LC	2019	\$0.88	\$3
Jeff Brian Ln	1.0	GC	2019	\$0.17	\$4
Jackson Rd	1.7	LC	2019	\$1.15	\$16
4630 Stockton Blvd	0.4	SPA	2019	\$0.15	\$9
Walerga Road & Elkhorn Blvd	1.5	LC	2018	\$0.18	\$3
5704 Karen Ln	0.4	SPA	2018	\$0.09	\$6
4345 47th St	0.3	LC	2018	\$0.22	\$15
4800 - 4812 Amber Ln	0.6	GC	2017	\$0.14	\$6
6400-6420 Rio Linda Blvd	0.5	LC	2017	\$0.04	\$2
6301 Franklin Blvd	1.8	LC	2017	\$0.26	\$3
Twin Cities Rd at E Stockton E	4.8	TC	2017	\$0.85	\$4
1 Kiefer Blvd	2.4	LC	2017	\$1.20	\$11
8865 Calvine Rd	2.4	LC	2017	\$1.25	\$12
7599 Stockton Blvd	0.9	LC	2017	\$0.41	<u>\$10</u>
<i>Average</i>					<u>\$8</u>

Appendix A Table 13
Hotel Land Sales (2017- 2020)
Updated Housing Trust Fund Nexus - Context Materials
Sacramento County, CA

<u>Property</u>	<u>Acres</u>	<u>Zoning</u>	<u>Year Sold</u>	<u>Price (\$M)</u>	<u>Price /SF Land</u>
<i>Metro Air</i> 4750 W Elkhorn Blvd	7.3	SPA	2017	\$3.50	\$11.04

**Appendix A Table 14
New Nonresidential Construction in Sacramento County (2010-2019)
Updated Housing Trust Fund Nexus - Context Materials
Sacramento County, CA**

<i>New Construction</i>	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Total
Warehouse and Industrial (Rentable SF 000s)⁽¹⁾											
Unincorporated Areas	0	0	0	0	0	0	20	1,075	0	0	1,095
Incorporated Cities	96	7	0	0	0	357	58	311	19	22	870
Total	96	7	0	0	0	357	78	1,386	19	22	1,965
Unincorporated Share	0%	0%	0%	0%	0%	0%	26%	78%	0%	0%	56%
Retail (Rentable SF 000s)											
Unincorporated Areas	4	19	38	114	146	274	126	78	55	26	879
Incorporated Cities	262	414	212	245	278	94	205	941	606	208	3,464
Total	266	433	249	359	423	368	331	1,020	661	234	4,343
Unincorporated Share	2%	4%	15%	32%	34%	74%	38%	8%	8%	11%	20%
Office (Rentable SF 000s)											
Unincorporated Areas	105	4	72	19	13	0	0	0	0	0	213
Incorporated Cities	525	160	234	290	82	36	184	0	241	65	1,818
Total	630	164	306	310	95	36	184	0	241	65	2,031
Unincorporated Share	17%	2%	24%	6%	13%	0%	0%	0%	0%	0%	10%
Hotel (Rooms)											
Unincorporated Areas	0	0	0	0	0	0	0	0	83	0	83
Incorporated Cities	0	0	0	0	0	106	97	250	116	229	798
Total	0	0	0	0	0	106	97	250	199	229	881
Unincorporated Share	0%	0%	0%	0%	0%	0%	0%	0%	42%	0%	9%

Source: Costar and STR

⁽¹⁾ Costar data indicates that nearly 3 million square feet of warehouse and industrial will be built in 2020, including more than 2 million square feet in unincorporated areas.

**Appendix A Table 15
Affordable Housing Fee as Percent of Total Fee Stack
Updated Housing Trust Fund Nexus - Context Materials
Sacramento County, CA**

	Sacramento County	City of Sacramento	Rancho Cordova	Elk Grove	West Sacramento	Placer County
Warehouse	2%	11%	2%	6%	0%	0%
Light Industrial	4%	17%	5%	5%	0%	0%
Retail	2%	9%	2%	3%	0%	0%
Office	4%	8%	5%	0%	0%	0%
Hotel	4%	8%	5%	10%	0%	0%

Note: Figures are calculated from fee amounts presented in Appendix A Table 5.

Appendix B – Non-Residential Affordable Housing Fee Program 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
SACRAMENTO AREA					
City of Sacramento Population: 490,000	1989 Most recent update, 2004	Office Hotel Commercial Manufacturing Warehouse/Office \$2.76 \$2.63 \$2.22 \$1.73 \$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 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. \$1.70	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 Hotel R&D Commercial Manufacturing Warehouse \$0.97 \$0.92 \$0.82 \$0.77 \$0.61 \$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 Hotel Manufacturing Warehouse \$0.78 \$2.20 \$0.88 \$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 Hotel R&D Commercial Manufacturing Warehouse \$0.97 \$0.92 \$0.82 \$0.77 \$0.61 \$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 Hotel R&D Commercial Manufacturing Warehouse \$0.97 \$0.92 \$0.82 \$0.77 \$0.61 \$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 Sierra Nevada / Tahoe area only \$2.00	No minimum threshold warehouse, commercial in mixed use over residential, governmental and institutional, childcare, churches.	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.

**APPENDIX B
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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	<p>25,000 gsf threshold</p> <p>Exempt: freestanding pharmacy < 50,000 SF; grocery < 75,000</p> <p>5,000 gsf threshold</p> <p>Shelter/jotel 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, no threshold</p> <p>Churches; universities; recreation; hospitals; private educational facilities; day care and nursery school; public facilities; retail, restaurants, services < 1,500 sf are exempt</p> <p>10,000 gross SF threshold</p> <p>Churches, private clubs, lodges, fraternal orgs, public facilities and projects with few or no employees are exempt.</p> <p>Office fee is 50% on the first 25,000 SF of building area.</p> <p>Exemptions for Child care, education, hospital, non-profits, public uses.</p> <p>Assembly, day care, nursery, schools and hospitals and commercial space in a mixed use project under 20,000 square feet are exempt.</p> <p>5,000 SF threshold</p> <p>25% fee reduction for projections paying prevailing wage.</p> <p>Schools, religious, child care centers, public and non-profit uses exempt.</p> <p>5,000 SF threshold</p> <p>Schools, places of public assembly, recreational facilities, hospitals, cultural institutions, childcare facilities, nursing homes, rest homes, residential care facilities, and skilled</p> <p>25% fee reduction for projections paying prevailing wage.</p> <p>Schools, churches, child care centers, public uses exempt.</p>	<p>Yes, may contribute land for housing.</p> <p>Yes</p> <p>Yes</p> <p>Yes</p> <p>Yes, preferred. May provide housing on- or off-site.</p> <p>N/A</p> <p>Yes.</p>	<p>Office and Laboratory fees reflect fully phased in January 1, 2021 fee levels. Fee is adjusted annually based on the construction cost increases.</p> <p>Fee varies by geographic area, project size and depending on timing of payment.</p> <p>Fee in effect July 1, 2020.</p> <p>Fee is adjusted annually based on CPI.</p> <p>Fee is adjusted annually based on CPI.</p> <p>Fee is adjusted annually based on CPI.</p> <p>Fee is adjusted annually based on ENR.</p> <p>Fee is adjusted annually based on ENR.</p>
		Hotel			
		Office (50,000 gsf and above)			
		Office (<50,000 gsf)			
		Laboratory			
		Small Enterprise Workplace			
		Office			
		Retail			
		Hotel (applies to net sf)			
		Warehouse			
Residential Care (applies to net SF)					
Industrial and Research and Dev.					
San Jose Population: 1,022,000	2020	Office	\$0-\$3		
		Office	\$0-\$15		
County of Santa Clara	2018	Academic Space (Stanford Area)	\$68.50	Yes	Fee in effect July 1, 2020.
		Office & R&D	\$36.53	Yes	Fee is adjusted annually based on CPI.
City of Palo Alto Population: 67,000	1984 Updated 2002 and 2017.	Other Commercial	\$21.26	Yes	Fee is adjusted annually based on CPI.
		Office & R&D	\$18.69	Yes, preferred. May provide housing on- or off-site.	Fee is adjusted annually based on CPI.
City of Menlo Park Population: 34,000	1998	Other com./Industrial	\$10.14		Fee is adjusted annually based on CPI.
		Industrial, Office, R&D; Retail, Hotel	\$16.50	N/A	Fee is adjusted annually based on CPI.
City of Sunnyvale Population: 152,000	1984 Updated 2003 and 2015.	Office, under 20,000 SF + Industrial 20,000 SF + Industrial under 20,000 SF	\$8.25		Fee is adjusted annually based on ENR.
		Retail, Hotel, Other 5,000 SF+	\$5.00		Fee is adjusted annually based on ENR.
		Low intensity uses	\$2.00		Fee is adjusted annually based on ENR.
		Office	\$26.10		Fee is adjusted annually based on ENR.
City of San Mateo Population: 104,000	2016	Hotel	\$10.44		Fee is adjusted annually based on ENR.
		Retail	\$5.22		Fee is adjusted annually based on ENR.
City of Foster City Population: 34,000	2016	Office, Medical Office and R&D	\$27.50		Fee is adjusted annually based on ENR.
		Hotel	\$12.50		Fee is adjusted annually based on ENR.
South San Francisco Population: 67,000	2018	Retail, Restaurant and Services	\$6.25		Fee is adjusted annually based on ENR.
		Office, Medical Office and R&D	\$15.00		Fee is adjusted annually based on ENR.
City of San Francisco Population: 864,000	2018	Hotel	\$5.00		Fee is adjusted annually based on ENR.
		Retail, Restaurant and Services	\$2.50		Fee is adjusted annually based on ENR.

**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
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 Hotel Retail, Restaurant, Services \$13.10 \$13.10 \$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) Hotel Retail & Restaurant \$20.00 \$5.00 \$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. Hotel/Retail/Entertainment. \$28.25 \$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 Hotel/Commercial/Retail \$24.60 \$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) All Other Non-Residential (rec. fee) \$25.00 \$15.00	500 SF threshold	Yes	Fee is adjusted annually based on CPI.
City of Milpitas Population: 75,000	2019	Offices/ Retail Industrial \$8.00 \$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 Hotel Retail / Restaurant /Services \$25.00 \$10.00 \$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.

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**APPENDIX B
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Jurisdiction	Yr. Adopted/ Updated	Fee Level (per Sq.Ft. unless otherwise noted)	Thresholds & Exemptions	Build Option/ Other	Comments
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 Retail/Restaurant Industrial/Manufacturing Hotel/Lodging Warehouse/Storage Self-Storage R&D \$4.50 \$4.50 \$2.25 \$4.50 \$2.25 \$4.37 \$4.50	7,500 SF threshold.	Yes	Annual CPI Increase. May negotiate fee downward based on hardship or reduced impact.
Ridgmont Population: 111,000	2020	Non-residential \$2.00	5,000 SF threshold	No	Fee Indexed annually by ENR Construction Cost Index Fees are as of 2020 full phase in.
City of Fremont Population: 231,000	2017	Office, R&D, Hotel, Retail Industrial, Mfg, Warehouse \$8.00 \$4.00	Public uses, additions less than 1,000 SF, manufacturing over 100,000 SF / building exempt. Schools, daycare centers, storage.	Yes by formula	
City of Emeryville City of Alameda Population: 78,000	2014 1989	All Commercial Retail Office Warehouse Manufacturing Hotel/Motel \$4.43 \$2.54 \$4.99 \$0.87 \$0.87 \$1,223	No minimum threshold	Yes Yes. Program specifies # of units per 100,000 SF	Fee adjusted annually. Fee may be adjusted by CPI.
City of Pleasanton Population: 79,000	1990, 2018	Retail Hotel/Motel Office \$4.56 \$4.56 \$7.61	No minimum threshold Churches exempt.	Yes	Fee adjusted annually.
City of Dublin Population: 57,000	2005	Indust. / R&D / Manuf / Warehouse Industrial Office R&D Retail Services & Accommodation Commercial Industrial \$12.64 \$0.56 \$1.45 \$0.95 \$1.18 \$0.49 \$3.80 \$0.72	20,000 SF threshold	N/A	
City of Newark Population: 46,000		Commercial Industrial \$3.80 \$0.72	No min threshold Schools, recreational facilities, religious institutions exempt.	Yes	Revised annually
City of Livermore Population: 88,000	1999	Retail Service Retail Office Hotel Manufacturing Warehouse Business / Commercial High Intensity Industrial Low Intensity Industrial \$1.38 \$1.04 \$0.89 \$679/ rm \$0.43 \$0.12 \$0.88 \$0.44 \$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.

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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/LJ \$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 & E 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
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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 Industrial Retail \$2.11 \$2.18 \$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 Hotel Retail Industrial Warehouse \$5.25 \$9.00 \$7.50 \$4.50 \$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 Hotel Retail Industrial \$3.55 \$6.00 \$3.55 \$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.

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SUMMARY OF NON-RESIDENTIAL AFFORDABLE HOUSING FEE PROGRAMS**

Jurisdiction	Yr. Adopted/ Updated	Fee Level <small>(per Sq. Ft. unless otherwise noted)</small>	Thresholds & Exemptions	Build Option/ Other	Comments
SOUTHERN CALIFORNIA City of Los Angeles Population: 3,950,000	2017	Non-Residential - fee varies by zone: Low \$3.00 Medium \$4.00 High \$5.00	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 grocery 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 \$10.83 Office \$12.45 Hotel/Lodging \$3.41 Hospital \$6.83 Industrial \$8.37 Institutional \$11.36 Creative Office \$10.65 Medical Office \$7.65 Non-Residential \$8.68	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	Schools, public facilities, non-profits, public transportation.	Yes	Fees adjusted by CPI annually
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	

**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
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% of building permit valuation	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		2,500 gsf threshold	Yes 2 aff. units per acre	
OTHER WEST COAST CITIES					
Seattle, WA Population: 638,000	Citywide Expansion Adopted 2015	Fees vary by geographic area / zone: Downtown and S. Lake Union (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.

Housing Trust Fund – Commercial Developers (9/7/21)

Attendance: Leanne Mueller, Todd Smith, Leighann Moffitt, Troy Givens, David Doezema (KMA), Christine Weichert (SHRA), Chuck Shaw, Frank Myers (McClellan), Phil Rodriguez (Lewis Corp), Brandon Black (Metro Chamber), and Chris Norem (BIA)

Leanne Mueller and David Doezema presented the Housing Trust Fund.

Chris Norem (CN): Wondered if any analysis with jurisdictions not in the region could be included– Fresno or Riverside? Housing is more costly here than other places - did the KMA report include the cost of housing? The report should look at construction of retail and industrial in the last 10 years - 2% raise might have a significant impact. Evaluate the impact on housing with one new job center and wants to see direct impact.

Chuck Shaw: Felt that the study did not address the real world development cost because we do not know what has been built over time that help to create no vacancy in small square foot industrial projects. This report creates frustration because developers pay fees for affordable housing, there is state laws requiring more money allocation and yet there is a claim that there is no employment. The money is getting collected, so who is sitting on all that money? Transportation fee can be collected over time, is there a way to deploy that for housing? Suggested that mechanisms to prorate housing fees also be explored.

Christine: SHRA is the agency that deals with funding from the Housing Trust Fund and they are not sitting on these accounts. All the money that is collect are allocated appropriately.

Responses to Questions:

Any Feedback? General comments were to analyze other regions in CA, but not the bay area. These areas include Inland Empire, Merced, Stockton and Reno.

Housing Trust Fund – Housing Advocates (9/15/21)

Attendance: Leanne Mueller, Todd Smith, David Doezema (KMA), Christine Weichert (SHRA), Erin Johansen, Ricardo Gutierrez, Cathy Creswell, Ardie Zahedani, Leah Miller (Habitat for Humanity), Patrick Ting (LSNC), Sarah Ropelato (LSNC), Darren Bobrowsky (USA Property – workforce housing), Kendra Noel, Ejiro Okoro, Keith Bloom, and Dixie Lira Baus (Eden Housing)

Leanne Mueller and David Doezema presented the Housing Trust Fund. During the presentation there were a comments based on the cost per unit to build – mostly comparisons to what each company typically pays for.

Darren asked what the Housing Trust Funds are used for - Leanne responded with developing VLI-LI workforce housing. Darren asked to clarify if it can be used for senior housing, since seniors work.

Christine identified that other populations such as senior or homeless have built in subsidies and this programs is specific to workforce housing.

Cathy stated that she hoped this program looked at all populations since the market impacts everyone. Other jurisdictions allow for more population groups and this HTF is too narrow.

David understood what they were identifying and stated that his firms have studied seniors and homeless; however, this HTF is for workforce housing.

Sarah asked if the nexus could be increased based on the pressure of the current housing market and it's impacts on the displacement of the senior population.

Leah asked if the fees were more expensive than other places and if by having higher fees prohibited/limited development.

Leanne clarified that this HTF has evaluated the neighboring jurisdictions.

Cathy stated that the County needed to raise the fees or evaluate other options because there is a need for that funding. She asked if the County was trying to mitigate the need for the funding.

Sarah supported Cathy in saying that the fees are too low. The City of Sacramento has more money because the fees are higher and the County is missing out by keeping fees low – there is tremendous need for new housing.

Todd wanted clarification from the group on where in the state the HTF project should look to for examples: San Jose (Cathy), Fremont (Dixie) and Seattle (Sarah).



KEYSER MARSTON ASSOCIATES.
ADVISORS IN PUBLIC/PRIVATE REAL ESTATE DEVELOPMENT

MEMORANDUM

ADVISORS IN:
REAL ESTATE
AFFORDABLE HOUSING
ECONOMIC DEVELOPMENT

To: Leanne Mueller
County of Sacramento

From: Keyser Marston Associates, Inc.

Date: September 28, 2021

Subject: Comparison of County's Development Fees to Other Regions

BERKELEY

A. JERRY KEYSER
TIMOTHY C. KELLY
DEBBIE M. KERN
DAVID DOEZEMA
KEVIN FEENEY

LOS ANGELES

KATHLEEN H. HEAD
JAMES A. RABE
GREGORY D. SOO-HOO
KEVIN E. ENGSTROM
JULIE L. ROMNEY
TIM BRETZ

SAN DIEGO

PAUL C. MARRA

The following memorandum provides information regarding development fees in other California regions, supplementing information about fees for the Sacramento region previously provided as part of the report prepared by Keyser Marston Associates Inc. ("KMA Context Report")¹ for the County of Sacramento ("County"). This additional fee comparison information is being provided in response to a request by stakeholders who participated in focus group meetings regarding the proposed update to the County's affordable housing fees. The additional fee comparison provides further context information to support consideration of proposed updates to the County's affordable housing fees for non-residential development.

KMA identified two third-party studies that provide comprehensive fee comparisons for other regions potentially of interest to the County:

- **Fee Comparison Addressing San Joaquin County, Stanislaus County, and select outer Bay Area cities: "Regional Development Fee Comparative Analysis."** Prepared by San Joaquin Partnership, referred to herein as the ("SJP Fee Study"); and
- **Fee Comparison Addressing Western Riverside County, Coachella Valley, and San Bernadino County: "Updated Analysis of Development Impact Fees in Western Riverside County Prepared for: Western Riverside Council of Governments (WRCOG)." Economic & Planning Systems, Inc. (EPS), referred to herein as the ("WRCOG Fee Study").**

¹ "Analysis, Context and Recommendations for Updates to Housing Trust Fund Fees." Prepared for County of Sacramento." Keyser Marston Associates, Inc. 2021.

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Subject: Comparison of County's Development Fees to Other Regions Page 2

These studies provide a comprehensive view of fees applicable to new development for a range of jurisdictions within each of the regions addressed. Rather than recreate these comprehensive studies, KMA summarized the pertinent non-residential fee information and combined it with fee information for the Sacramento area included in the KMA Context Report.

The WRCOG Fee Study reflects fee schedules in effect as of 2018-19, while the SJP Fee Study reflects fee schedules as of 2012-13. It is likely that fee schedules for a number of the jurisdictions addressed were modified since the time of the surveys; however, the information still provides general context regarding fees in other regions. Since fees are typically indexed, fee data from the WRCOG Fee Study and SJP Fee Study are adjusted for inflation through FY 2020-21 for consistency with the KMA Context Report using the California Consumer Price Index published by the California Department of Industrial Relations.

Table 1 summarizes the fee comparison. The specific jurisdictions covered by the fee comparison information in each area are listed in Table 2. For consistency across sources, the fee comparisons are presented inclusive of impact fees, school fees, capacity fees and connection charges. Permit processing and plan check costs are included in the KMA Context Report and SJP Fee Study; however, these items were removed for purposes of Table 1 to provide a consistent comparison with data from the WRCOG Fee Study, which did not encompass permit processing costs.

Table 1 – Fee Comparison Summary (\$/SF of Building Area)

	Warehouse	Retail	Office
Sacramento County	<u>Metro Air</u>	<u>Arden</u>	<u>Metro Air</u>
	\$11.92	\$30.03	\$18.85
	<u>Mather</u>	<u>Antelope</u>	<u>Arden</u>
	\$11.62	\$37.20	\$24.09
Averages, Comparisons In:			
Sacramento Area	\$8.87	\$25.37	\$22.34
San Joaquin County	\$8.00	\$15.54	\$15.50
Stanislaus County	\$7.83	\$15.46	\$15.77
Outer Bay Area (select cities)	\$10.81	\$33.03	\$29.39
Western Riverside County	\$5.43	\$24.74	\$14.72
Coachella Valley	\$4.65	\$15.75	\$9.33
San Bernadino County	\$6.19	\$14.26	\$15.83
Highest, Comparisons In:			
Sacramento Area	\$14.61	\$39.31	\$31.20
San Joaquin County	\$11.70	\$20.54	\$23.13
Stanislaus County	\$18.73	\$21.97	\$21.99
Outer Bay Area (select cities)	\$18.47	\$45.87	\$47.78
Western Riverside County	\$10.09	\$43.15	\$23.33
Lowest, Comparisons In:			
Sacramento Area	\$5.15	\$20.69	\$15.38
San Joaquin County	\$3.97	\$9.02	\$7.90
Stanislaus County	\$2.11	\$5.21	\$5.99
Outer Bay Area (select cities)	\$4.02	\$15.38	\$15.54
Western Riverside County	\$2.89	\$14.11	\$6.93

Sources: WRCOG Fee Study, SJP Fee Study, KMA Context Report. Fee information from the WRCOG and SJP Fee studies are adjusted for inflation through 20-21.

Note: high and low fees for Coachella Valley and San Bernadino County jurisdictions are not available in WRCOG Study. See Table 2 for a list of the jurisdictions included in fee information for each area. See Table 3 and 4 for additional information by jurisdiction.

Compared to fees for jurisdictions in the seven comparison areas:

- The County's fees for warehouse are above the averages for the comparison areas but are below the highest fees in the Sacramento area, Stanislaus County, and selected outer Bay Area cities.
- The County's fees for retail are above averages for the comparison areas, except the selected outer Bay Area cities, are below the highest fees for comparison jurisdictions in Western Riverside County selected outer Bay Area cities, and similar to the highest fees within the Sacramento area.

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- The County's fees for office in Metro Airpark are similar to or below averages in most of the comparison areas and below the highest fee jurisdictions in all areas. Office fees in Arden are above averages for the comparison areas except the outer Bay Area, are similar to the highest fees in San Joaquin, Stanislaus and Western Riverside counties, and below the highest fees in the Sacramento area and select outer Bay Area jurisdictions.

The comparison to other regions provides a broader perspective on fee levels in other regions. However, it is helpful to keep in mind that, in most cases, non-residential development projects are delivered to meet a local demand for space. Developers may consider multiple viable sites in the region, with fees being one consideration among many in selecting a site. In limited instances in which sites in multiple regions throughout the state are considered, regional differences are likely to factor into decision making. For example, differences in the local labor force, transportation networks, customer and supplier base, commercial rents and vacancy rates, construction costs, site availability and cost, and quality of life considerations might all be nearer to the heart of the decision-making process than variations in development impact fees.

Table 2 – Jurisdictions Included In Fee Comparisons

<u>Sacramento Area</u> City of Sacramento Rancho Cordova Elk Grove West Sacramento Placer County	<u>San Joaquin County</u> Lathrop Lodi Manteca Ripon County Unincorp. Mountain House Stockton Tracy	<u>Coachella Valley</u> Indio Palm Desert Palm Springs	<u>Western Riverside</u> Banning Canyon Lake Beaumont Calimesa Corona Eastvale Hemet Jurupa Valley Lake Elsinore Menifee Murrieta Norco Perris Riverside San Jacinto Temecula Wildomar Temescal Valley Winchester March JPA
<u>select Outer Bay Area</u> Livermore Pleasanton Fairfield Vacaville	<u>Stanislaus County</u> Ceres Modesto Patterson Turlock County Unincorp.	<u>San Bernadino County</u> Fontana Yucaipa San Bernardino Ontario Chino Rialto	

Sources: WRCOG Fee Study, SJP Fee Study, KMA Context Report.

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Only Livermore and Pleasanton, in the outer Bay Area, and the Sacramento area comparisons other than West Sacramento, are known to have non-residential affordable housing fees.

Additional detail on fees by jurisdiction is provided in Table 3, with indexing for inflation, and Table 4, without indexing for inflation. The WRCOG study does not specify fee amounts for all jurisdictions except in graphical form; therefore, only average, high, and low fee amounts are identified.

While KMA believes the sources referenced in this memorandum to be sufficiently accurate for the general comparison purposes for which they are used, KMA cannot guarantee their accuracy. For use other than general comparison purposes, please consult the code, fee schedule, and staff of the applicable jurisdiction.

Table 3
Comparison of Fees to Other Regions, With Inflation Adjustment
Sacramento County, CA

	Warehouse	Retail	Office
Sacramento County	Metro Air \$11.92	Arden \$30.03	Metro Air \$18.85
	Mather \$11.62	Antelope \$37.20	Arden \$24.09
City of Sacramento	\$5.15	\$22.64	\$31.20
Rancho Cordova	\$11.47	\$39.31	\$16.50
Elk Grove	\$14.61	\$22.04	\$15.38
West Sacramento	\$5.84	\$20.69	\$22.94
Placer County	\$7.30	\$22.18	\$25.70
Sacramento Area Average	\$8.67	\$25.37	\$22.34
Western Riverside Average	\$5.43	\$24.74	\$14.72
Western Riverside Low	\$2.69	\$14.11	\$6.93
Western Riverside High	\$10.09	\$43.15	\$23.33
Coachella Valley Average	\$4.65	\$15.75	\$9.33
San Bernadino Co Average	\$6.19	\$14.26	\$15.83
Lathrop	\$5.87	\$12.51	\$11.38
Lodi	\$4.36	\$9.02	\$10.98
Manteca	\$10.30	\$19.46	\$20.61
Ripon	\$11.70	\$20.50	\$23.13
San Joaquin Co Unincorporated	\$3.97	\$9.04	\$7.90
Mountain House	\$11.14	\$20.54	\$17.90
Stockton	\$5.76	\$17.91	\$18.91
Tracy	\$10.86	\$15.34	\$13.20
San Joaquin Co Average	\$8.00	\$15.54	\$15.50
Livermore	\$14.77	\$41.84	\$38.57
Pleasanton	\$18.47	\$45.87	\$47.78
Fairfield	\$4.02	\$29.04	\$15.54
Vacaville	\$5.99	\$15.38	\$15.67
Outer Bay Area Average	\$10.81	\$33.03	\$29.39
Ceres	\$6.11	\$13.84	\$12.48
Modesto	\$4.93	\$17.36	\$16.96
Patterson	\$18.73	\$21.97	\$21.99
Turlock	\$7.27	\$18.93	\$21.43
Stanislaus County Unincorporated	\$2.11	\$5.21	\$5.99
Stanislaus County Average	\$7.83	\$15.48	\$15.77

Note: For consistency, permit processing, inspection, and plan check fees are not included, as these costs were not included in the WRCOG Fee Study. An inflation adjustment using California CPI is applied to the WRCOG and SJP Fee Study amounts.

Sources:

Sacramento Area comparisons: "Analysis, Context and Recommendations for Updates to Housing Trust Fund Fees. Prepared for County of Sacramento." Keyser Marston Associates, Inc.. 2021.

Western Riverside, Coachella Valley and San Bernadino Comparisons: "Updated Analysis of Development Impact Fees in Western Riverside County Prepared for: Western Riverside Council of Governments (WRCOG)." Economic & Planning Systems, Inc. (EPS). 2019

San Joaquin, outer Bay Area, and Stanislaus County comparisons from "Regional Development Fee Comparative Analysis." Prepared by San Joaquin Partnership. 2013.

Table 4
Comparison of Fees to Other Regions, Without Inflation Adjustment
Sacramento County, CA

	Warehouse	Retail	Office
Sacramento County	Metro Air \$11.92	Arden \$30.03	Metro Air \$18.85
	Mather \$11.62	Antelope \$37.20	Arden \$24.09
City of Sacramento	\$5.15	\$22.64	\$31.20
Rancho Cordova	\$11.47	\$39.31	\$16.50
Elk Grove	\$14.61	\$22.04	\$15.38
West Sacramento	\$5.84	\$20.69	\$22.94
Placer County	\$7.30	\$22.18	\$25.70
Sacramento Area Average	\$8.87	\$25.37	\$22.34
Western Riverside Average	\$5.19	\$23.63	\$14.06
Western Riverside Low	\$2.76	\$13.48	\$6.62
Western Riverside High	\$9.64	\$41.21	\$22.28
Coachella Valley Average	\$4.44	\$15.04	\$8.91
San Bernadino Co Average	\$5.91	\$13.62	\$15.12
Lathrop	\$4.90	\$10.44	\$9.50
Lodi	\$3.64	\$7.53	\$9.16
Manteca	\$8.60	\$16.25	\$17.20
Ripon	\$9.77	\$17.11	\$19.30
San Joaquin Co UnIncorporated	\$3.31	\$7.54	\$6.60
Mountain House	\$9.30	\$17.15	\$14.94
Stockton	\$4.81	\$14.95	\$15.79
Tracy	\$9.08	\$12.80	\$11.02
San Joaquin Co Average	\$6.67	\$12.97	\$12.94
Livermore	\$12.33	\$34.92	\$32.20
Pleasanton	\$15.42	\$38.29	\$39.88
Fairfield	\$3.35	\$24.24	\$12.97
Vacaville	\$5.00	\$12.83	\$13.08
Outer Bay Area Average	\$9.02	\$27.57	\$24.53
Ceres	\$5.10	\$11.55	\$10.42
Modesto	\$4.12	\$14.49	\$14.16
Patterson	\$15.63	\$18.34	\$18.36
Turlock	\$6.07	\$15.80	\$17.88
Stanislaus County Unincorporated	\$1.76	\$4.35	\$5.00
Stanislaus County Average	\$6.54	\$12.90	\$13.16

Note: For consistency, permit processing, inspection, and plan check fees are not included, as these costs were not included in the WRCOG Fee Study.

Sources:

Sacramento Area comparisons: "Analysis, Context and Recommendations for Updates to Housing Trust Fund Fees. Prepared for County of Sacramento." Keyser Marston Associates, Inc., 2021.

Western Riverside, Coachella Valley and San Bernadino Comparisons: "Updated Analysis of Development Impact Fees in Western Riverside County Prepared for: Western Riverside Council of Governments (WRCOG)." Economic & Planning Systems, Inc. (EPS), 2019

San Joaquin, outer Bay Area, and Stanislaus County comparisons from "Regional Development Fee Comparative Analysis." Prepared by San Joaquin Partnership, 2013.

Prepared by: Keyser Marston Associates

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