

# **Fairview Bridge Replacement and Street Improvements (9th Street to 16th Street) Project**

## **Draft Relocation Plan**

Prepared for:

**City of Santa Ana**  
Public Works Agency  
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Santa Ana, California 92702

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February 2022

Adopted

Date: \_\_\_\_\_



## **ADVISORY NOTICE**

February 11, 2022

On behalf of the City of Santa Ana, we are notifying you that the draft Relocation Plan (Plan) for the **Fairview Bridge Replacement and Street Improvements (9th Street to 16th Street) Project** has been completed. The Plan will be available for a period of thirty (30) days for public review and comment **beginning Friday, February 11, 2022**. All written comments regarding the Plan should be submitted **no later than 5:00 p.m., Tuesday, March 15, 2022**.

The Relocation Plan is available for your review at the following locations:

City of Santa Ana  
20 Civic Center Plaza  
City Hall, 8th Floor  
Santa Ana, CA 92701  
Monday – Thursday (8 am – 5 pm)  
Alternate Fridays (8 am – 4pm)

City of Santa Ana  
20 Civic Center Plaza  
Ross Annex Bldg, 1<sup>st</sup> Floor  
Santa Ana, CA 92701  
Monday – Thursday (8 am – 5 pm)  
Alternate Fridays (8 am – 4 pm)

City of Santa Ana  
Public Library  
26 Civic Center Plaza  
Santa Ana, CA 92701  
Monday & Wednesday (12 pm – 8 pm)  
Tuesday & Thursday (10 am – 6 pm)  
Friday & Saturday (9 am – 5 pm)

The draft Relocation Plan will also be posted at the following link:

<https://www.santa-ana.org/pw/fairview-bridge-replacement-and-street-improvements>

If you have any comments regarding the draft Relocation Plan or the proposed project, submit your written comments by **Tuesday, March 15, 2022**, to:

**Ms. Daniela Borbe**  
**Monument, Inc.**  
**200 Spectrum Center, Suite 300**  
**Irvine, CA 92618**

Or via email at:  
[fairview@santa-ana.org](mailto:fairview@santa-ana.org)



200 Spectrum Center, Suite 300, Irvine, CA 92618

[info@monumentrow.com](mailto:info@monumentrow.com) | 800 577 0109

[monumentrow.com](http://monumentrow.com)

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- Exhibit D: Residential Informational Brochure
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## Introduction

The City of Santa Ana (City) proposed the Fairview Bridge Replacement and Street Improvements (9th Street to 16th Street) Project (Project), a street improvement project located in the northwestern portion of Santa Ana, from 9<sup>th</sup> Street to 16<sup>th</sup> Street, in the City of Santa Ana, in Orange County, California.

The Project safety improvement will require the full acquisition of one (1) property and partial acquisition of two (2) properties resulting in the permanent displacement of one (1) residential duplex with 2 units.

Funding for the Project comes from a combination of federal funds, OCTA Measure M2 Funds and local funds. The City has retained Monument Inc. to prepare the Relocation Plan (Plan) in connection with the commencement of the right of way acquisition and relocation activities. Monument Inc., an experienced acquisition and relocation firm, has been selected to prepare this Relocation Plan, and will provide all subsequently required relocation assistance in association with any permanently displaced households occupants. In compliance with statutory requirements, the Relocation Plan has been prepared to evaluate the present circumstances and replacement housing requirements of Project tenants. This Relocation Plan conforms with Federal law, 42 U.S.C. 4601 et seq., Federal Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (URA), as amended, and implements regulations found in 49 CFR Part 24, and applicable state laws and regulations found in the California Government Code Section 7260, et seq. and the California Code of Regulations, Title 25, Division 1, Chapter 6, Subchapter 1 (Guidelines); and the City's adopted right-of-way policies and procedures.

The Plan is organized in five sections:

1. The regional and specific location of the Project **(SECTION I)**;
2. An assessment of the relocation needs of those persons subject to displacement as a result of the Project **(SECTION II)**;
3. An assessment of available residential replacement sites within the Santa Ana and surrounding areas **(SECTION III)**;
4. A review of the relocation assistance program to be offered to the displaced residential occupants **(SECTION IV)**; and
5. Necessary administrative provisions **(SECTION V)**.

## I. Project Area Description

### A. Regional Location

The Project is located in the City of Santa Ana within Orange County. Santa Ana is located approximately 30 miles southeast of the City of Los Angeles and is travelled by Interstate 5 (I-5) and easily accessible by State Routes 22 and 55. Adjacent communities include Tustin, Orange, Anaheim, Westminster, Fountain Valley, Costa Mesa and Irvine. (See *Figure 1: Regional Project Location*)

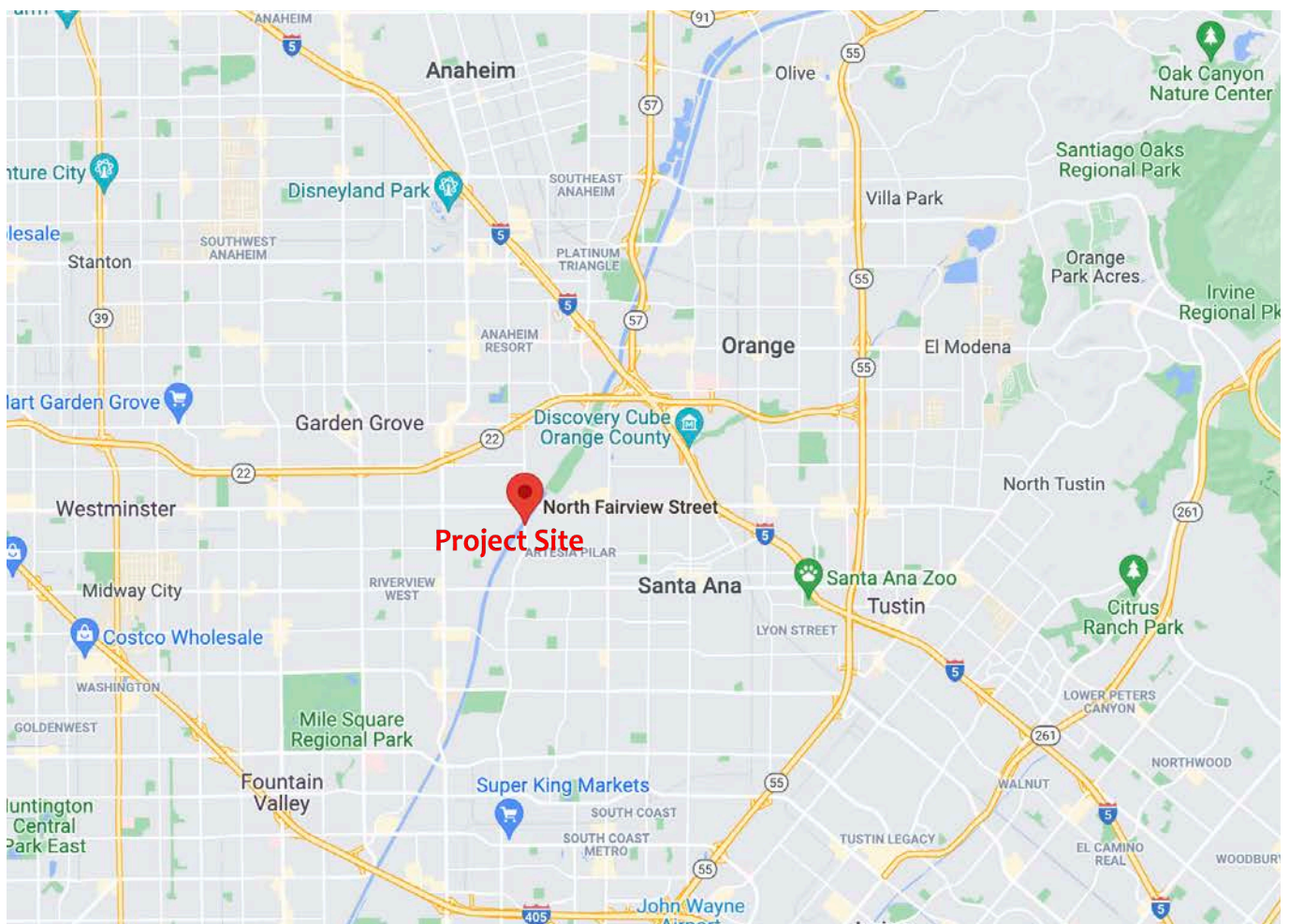


Figure 1: *Regional Project Location*

## B. Project Site Location and Description

The Project site is on Fairview Street between 9<sup>th</sup> Street and 16<sup>th</sup> Street. (See *Figure 2: Project Site Location*) The Project Site is located approximately 1.5 miles south of State Route 22 (SR-22), 2.5 miles west of Interstate 5 (I-5) and 4.8 miles north of Interstate 405 (I-405). Santa Ana is the County Seat and is the second largest city in Orange County and eleventh largest in California.<sup>1</sup>

The Fairview Bridge Replacement and Street Improvements (9th Street to 16th Street) Project (Project) consists of a north/south major arterial located in the northwestern portion of the City. South of 9th Street, Fairview Street provides three lanes in each direction that are reduced to two lanes in each direction north of 9th Street, across the existing four-lane bridge, to 16th Street. The Fairview Street segment between 9th Street and 16th Street is the only constraint for Fairview Street to be built out to its planned width of six lanes. This condition causes a traffic “bottleneck” during peak hours. Additionally, the project will provide adequate line of sight (safe viewing distance) for vehicles turning onto Fairview Street from 9th Street. View obstructions taller than 2.5 ft (such as a property wall) would be removed to maintain line of sight. Lastly, there are no sidewalks, bikeways, or lighting on the existing bridge. Pedestrians and bicyclists currently use the roadway shoulder to cross the bridge.

The proposed Project includes replacing the Fairview Street bridge over the Santa Ana River and widening Fairview Street between 9th Street and 16th Street. The proposed Project would widen Fairview Street from two lanes in each direction to three lanes in each direction in Santa Ana. The Fairview Street bridge would be replaced with a new six-lane bridge (three lanes in each direction), including a complete bridge deck with barrier rails, sidewalks, bicycle lanes, a raised landscaped median, and lighting.

The proposed bridge would be expanded from approximately 52 feet (ft) to 100 ft in width and would have the same roadway profile as the existing bridge. The eight pier walls that support the existing bridge would be removed, and four new pier walls would be constructed to support the new bridge.

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<sup>1</sup> City of Santa Ana website: <https://www.santa-ana.org/library/services/facts-and-figures>, accessed January 21, 2022.

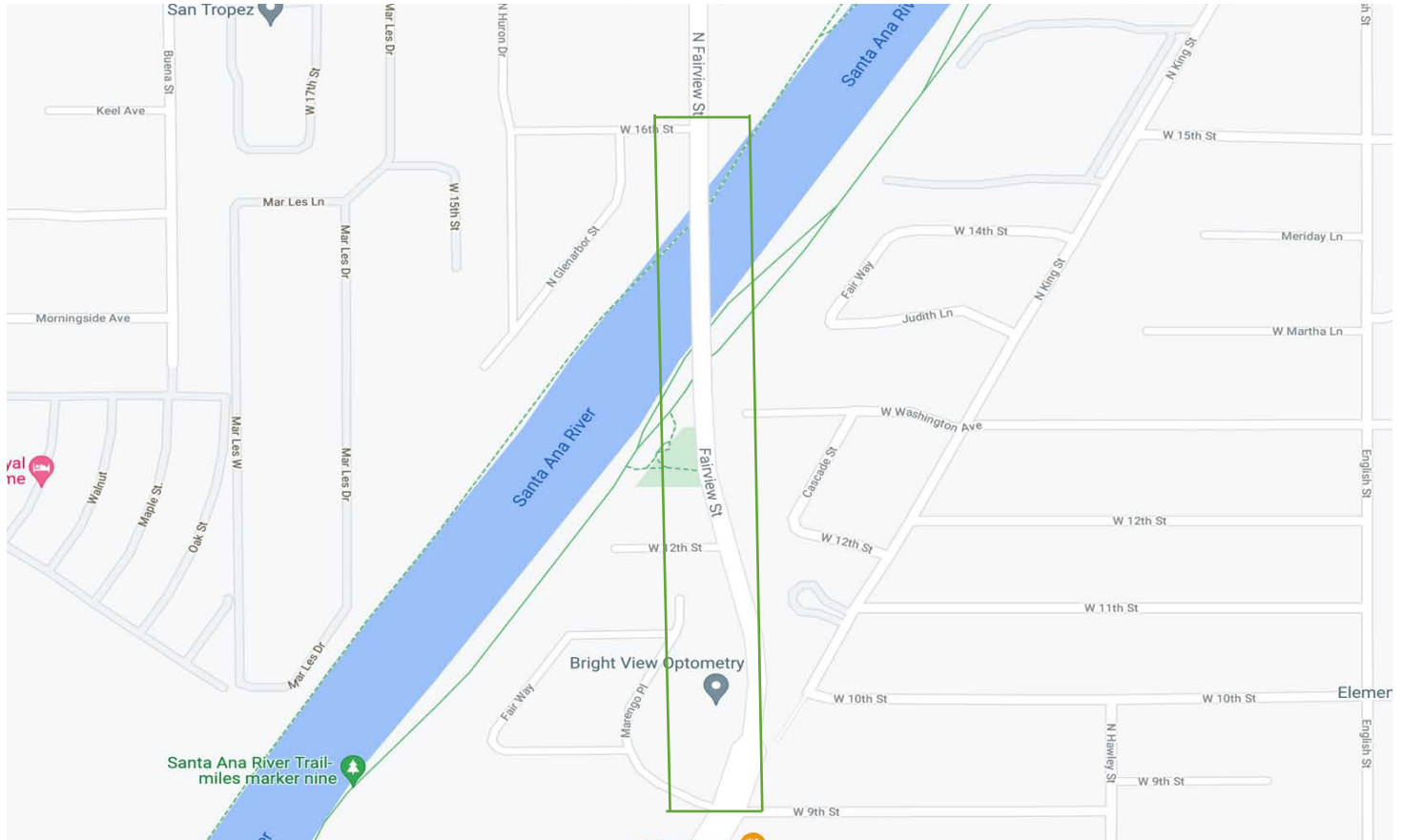


Figure 2: Project Site Location

### C. General Demographic and Housing Characteristics

According to the 2020 U.S. Census, the population of the City of Santa Ana was 310,227, and the population of the impacted Census Tract is 5,594 (see **Table 1** below). Corresponding Census data concerning the housing mix is shown in **Table 2**, below.

**Table 1: 2020 US Census Population – City of Santa Ana and Impacted Tract (752.01)**

Population	Number of Persons	Percentage	City	Percentage
Total population	5,594	100.0%	310,227	100.0%
White alone	579	10.3%	57,376	18.5%
Black or African American alone	43	0.8%	3,343	1.1%
American Indian or Alaskan Native alone	199	3.6%	11,403	3.7%
Asian alone	425	7.6%	38,004	12.3%
Native Hawaiian and Other Pacific Islander alone	0	0%	828	0.2%
Some other Race alone	3,304	59%	139,920	45.1%
Two or More Races	1,044	18.7%	59,353	19.1%
Hispanic or Latino (of Any Race)	5,001	89.4%	238,022	76.7%

U.S. Census Bureau provides additional descriptive population data where persons are identified as either “Hispanic or Latino” or “Not Hispanic or Latino.” The sum of these two categories will equal the total population of a data set.

**Table 2: 2020 US Census Housing Units – City of Santa Ana and Impacted Tract (752.01)**

Type	Number of Units	Percentage	City	Percentage
Total occupied units	1,102	98.9%	76,622	96.7%
Vacant Housing Units	12	1.1%	2,559	3.2%

Source: U.S. Census Bureau, accessed January 23, 2022.



## II. Assessment of Relocation Needs

### A. Survey Methods

The information necessary for the preparation of this Plan was obtained from personal interviews with Project residents. Interviewers were successful in obtaining survey information from each of the identified households within the project area.

Detailed in-person interviews were conducted with affected residential occupants to gather necessary information, including information such as household size and composition, income, monthly rent obligation, length and type of occupancy, language, disabilities/health problems, and replacement housing preferences.

In-person interviews are an important factor in the planning and relocation of displacees. In the early planning process, careful attention is paid to the physical needs of individuals with disabilities, and elderly displacees to make sure that these individuals receive appropriate care and housing.

The descriptive data in this Plan concerning the residents is based on in-person interviews and field observations. Samples of the residential interview form used in the interview process is attached as **Exhibit A** of this report.

### B. Field Survey Data – Residential

The Project will impact 1 residential duplex (Duplex) dwelling with 4 residential households. Survey information was obtained from all 4 occupied residential households (100%). The City has adopted and would adhere to its local housing occupancy standards to make sure housing is of the appropriate size in relocating the affected occupants.

**Table 3** below shows current housing in the Project area including bedroom size.

**Table 3: Affected Residential Dwellings**

No.	Address	Property Type	Use	Number of Bedrooms	Number of Occupants	Occupancy Type	City
1	2507 W. 9 <sup>th</sup> Street	Residential	Duplex	3	2	Owner	Santa Ana
2	2507 W. 9 <sup>th</sup> Street (room)	Residential	Room to rent	Room	2	Tenant	Santa Ana
3	2507 W. 9 <sup>th</sup> Street (garage)	Residential	Garage to rent	2 rooms	3	Tenant	Santa Ana
4	2509 W. 9 <sup>th</sup> Street	Residential	Duplex	3	2	Tenant	Santa Ana

### 1. Housing Mix

As shown in **Table 3** above, the Project area includes 4 households occupying 1 residential building (duplex), with one dwelling unit occupied by one household, another dwelling unit occupied by two households and one converted garage occupied by one household. 3 of the affected households are tenant-occupied and 1 is owner-occupied. Occupancy information will assist in determining the relocation needs and scope of assistance provided. No mobile homes will be affected by the Project.

### 2. Occupancy Standards

The standard for housing density adopted by the City allows two persons per bedroom and one person in a common living area. The City adheres to the state building code occupancy standard based on the square footage of dwellings for households larger than eight members. Referrals to replacement housing provided to occupants may reflect the need for larger accommodations to comply with the state and City of Santa Ana code requirements.

Generally, these standards allow for up to three persons to occupy a one-bedroom unit, five persons in a two-bedroom unit, and seven persons in a three-bedroom unit. Any households with more than eight members would require a four-bedroom replacement unit based on the respective size of that unit, per the state building code.

### 3. Income

Information as to the household's income is gathered from residential interviews to determine individual relocation needs and the scope of financial relocation assistance that may be provided. Low-income households may experience challenges qualifying for the purchase or rent of replacement housing. Advance replacement housing payments may be needed to assist displacees in qualifying for loans or leases. Low-income households that choose to rent may be eligible for additional assistance.

Based on information obtained from the residential interviews, we were unable to determine at this time if any households are identified as low-income households. According to the low-income standards for the Housing Authority of the County of Orange (**Exhibit B**), adjusted for family size as published by the State of California, Department of Housing and Community Development (HCD), the 2021 low income limits are defined as follows:

Family Size	1	2	3	4	5	6	7	8
Low Income Limits 2021	\$75,300	\$86,050	\$96,800	\$107,550	\$116,200	\$124,800	\$133,400	\$142,000

Source: Department of Housing and Community Development (HCD) website, accessed January 24, 2022

### 4. Ethnicity/Language

Per the 2019 U.S. Census American Community Survey One-Year Estimate, 80.2%<sup>2</sup> of the population in the City of Santa Ana speaks a language besides English at home. Based on information obtained from the residential interviews of the 4 displaced households, Spanish

<sup>2</sup> United States Census Bureau web site, accessed January 24, 2022, <https://data.census.gov/>



is the primary language spoken at home. Language services are available to assist the requirements of all affected occupants.

### **5. Households with Seniors**

Per the 2019 U.S. Census American Community Survey One-Year Estimate, 14.5% of the total households consist of occupants 65 years of age or over. Specific care is taken to identify and address the needs of senior occupants who may require special accommodations. Based on information obtained from residential interviews, no households have occupants that are over the age of 65.

### **6. Households with Disabilities**

Per the 2019 U.S. Census American Community Survey One-Year Estimate, 7.5%<sup>3</sup> of the civilian population consist of persons with a disability. Disabilities may include a variety of physical mobility impairments, including psychological and other physical health issues. Care is taken to meet the special needs of each household, particularly as these needs involve physical access to accommodations. Early identification of individual health issues would enable relocation staff to more effectively manage the relocation process. In all cases involving physical or mental impairments, additional services will be provided to ensure close individual case monitoring. Based on information obtained from the residential interviews, no households have occupants that have disabilities.

### **7. Preferred Relocation Areas**

The residential interviews identify specific replacement site needs and preferences and assist in planning replacement housing accordingly. In residential interviews, many residents tend to express a preference to remain in the community in order to maintain current school enrollment, access to employment, medical facilities, recreational resources, and public transportation. Based on information obtained from the residential interviews, the affected households have indicated a preference to remain in the local Santa Ana, Fountain Valley, and Garden Grove areas.

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<sup>3</sup> United States Census Bureau web site, accessed January 24, 2022, <https://data.census.gov/>

### III. Relocation Resources

The Federal Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (URA), as amended, and the California Relocation Assistance Law provides that no eligible residential persons shall be required to move from their dwelling unless comparable replacement dwellings are available to such persons. The purpose of this section is to identify whether sufficient comparable replacement housing resources exist for all potential residential displacees. The City is committed to making every effort to satisfactorily relocate all displaced occupants.

#### A. Methodology

To determine the availability of residential sites prior to the displacement of occupants from the Project area, resources were researched through the following sources:

- Internet sources (MLS listings, Zillow, etc.);
- Classified rental listings from local publications, and;
- Contacts with real estate/property management companies serving the community.

#### B. Replacement Housing Availability

##### 1. Residential For-Sale and Rental Housing

A housing resource survey was conducted to determine the availability of replacement housing within the City of Santa Ana sufficient to meet the needs of displaced rental tenants and homeowners.

The replacement housing survey considered available rooms for rent, one-, and three-bedroom conventional housing for rent and three-bedroom conventional housing for sale. This data is summarized in **Tables 4 and 5**, below. The conventional housing survey, **Table 4**, identified 40 currently available, rooms for rent, one-, and three-bedroom conventional housing units for rent. The survey of available single-family residences for sale, **Table 5**, identified 22 currently available three-bedroom housing units for sale. The individual figures for number of units found by bedroom size are presented in the tables, as well as location and price range.

**Table 4: Availability and Cost of Replacement Rental Housing (Conventional)**

Number of Bedrooms	Property Type	Number Available	City(s)	Price Range Lease
Room for rent	Duplex/SFR	9	Santa Ana	\$700-\$1,550
One	Apartment	17	Santa Ana, Garden Grove, Orange, Anaheim, Tustin, Irvine	\$1,375-\$2,875
Three	Duplex/Triplex/Townhome	14	Santa Ana, Garden Grove, Anaheim, Tustin, Irvine, Orange	\$2,650-\$5,500

Source: Multiple Listing Service and Zillow, accessed January 25, 2022.

The rent ranges identified in the table above are among the figures used to make benefit and budget projections for this Plan. The variances in the rent range are a result of age, condition, size, and locational factors. Rates are subject to change according to the market rates prevailing at the time of displacement. **Exhibit C** provides a detailed list of available housing for rent and for sale.

**Table 5: Availability and Cost of Single-Family Residences for Sale**

# Bedrooms	Property Type	Total Available	City	Price Range (in 000's)
Three	Duplex/SFR	22	Santa Ana	\$674 - \$1,250

Source: Multiple Listing Service, accessed January 25, 2022.

## 2. Summary

Considering the availability of replacement housing, adequate replacement resources exist in the Project area for affected residential tenants and owner-occupants.

Although adequate replacement resources exist, based on surveyed results of rental and purchase opportunities, and anticipated values of existing dwellings, occupants are anticipated to have increases in monthly rents and/or higher purchase costs. These possible increases, if any, would be met through the City's Relocation Assistance Program, including Last Resort Housing (LRH) requirements.

## C. Related Issues

### 1. Concurrent Residential Displacement

There are no known public projects anticipated in the Project area that will cause significant displacements during the timeframe of anticipated Project displacements in spring/summer of 2022. No residential displacee will be required to move without both adequate notice and access to available, comparable, affordable, decent, safe and sanitary housing.

### 2. Temporary Relocation

The Project is not anticipated to cause temporary displacements. Affected occupants will be permanently displaced.

## IV. The Relocation Program

The City of Santa Ana's (City) Relocation Program is designed to minimize hardship, be responsive to unique project circumstances, maintain personal contact with all affected individuals, consistently applying all regulatory criteria to formulate eligibility and benefit determinations, and conform to all applicable requirements. The relocation program to be implemented by the City will conform with the standards and provisions of the Federal Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 (URA), as amended, and the California Relocation Assistance Law, *California Government Code* §7260, et seq.; the Relocation Assistance and Real Property Acquisition Guidelines; *California Code of Regulations*, Title 25, Division 1, Chapter 6 (Guidelines); and the City's adopted right-of-way policies and procedures.

The City has retained Monument Inc. (Monument) to administer the Relocation Program. Monument has an extensive resume of public works projects undertaken in other Orange County communities. Experienced City staff would monitor the performance of Monument and be responsible to approve or disapprove Monument's recommendations concerning eligibility and benefit determinations and interpretations of the City's policy.

The Relocation Program consists of two principal constituents: Advisory Assistance and Financial Assistance.

### A. Program Assurances, Standards and Objectives

The City would provide the displaced residential occupants with the assistance, rights, and benefits required under federal and state relocation law and the City's policies and procedures. The relocation program would provide advisory and financial assistance. Every effort would be made to facilitate relocation arrangements and minimize hardship for displacees.

The program objectives would be as follows:

1. To fully inform eligible Project displacees of the nature of, and procedures for, obtaining relocation assistance and benefits;
2. To determine the needs of each displacee eligible for assistance;
3. To provide continuously updated referrals to potential replacement sites within a reasonable time prior to displacement and assure that no occupant is required to move without a minimum of 90 days written notice to vacate;
4. To provide assistance that does not result in different or separate treatment due to race, color, religion, national origin, sex, marital status or other arbitrary circumstances;
5. To supply information concerning federal and state programs and other governmental programs providing assistance to displaced persons;
6. To assist each eligible occupant to complete applications for benefits;
7. To make relocation benefit payments in accordance with the appropriate guidelines;
8. To inform all persons subject to displacement of City policies with regard to eviction and property management; and

9. To establish and maintain a formal grievance procedure for use by displaced persons seeking administrative review of City decisions with respect to relocation assistance.

## **B. Relocation Advisory Assistance**

Monument staff is available to assist the permanently displaced households with questions or concerns about relocation and/or assistance in relocating. Relocation staff can be reached at 200 Spectrum Center, Suite 300, Irvine, CA 92618 with office hours from 8:00 a.m. to 5:00 p.m., and can be contacted at (800) 577-0109. A comprehensive relocation program, with technical and advisory assistance, would be provided to assist all persons being displaced as a consequence of the Project. Personal contact would be maintained with all individuals until the relocation process has been completed.

As discussed previously, Monument has been retained by the City to assist in the administration of its relocation program. Monument will work closely with City staff. City staff would provide final approvals, or otherwise, of all Monument's recommendations. Every reasonable effort would be made to ensure that the relocation of residents occurs with a minimum of delay and hardship.

The following services will be provided:

1. A printed Informational Brochure (**Exhibit D**) will be provided in English or the displacee's language if subsequently be deemed necessary. Signed acknowledgements will be obtained to verify receipt of this material;
2. A database will be maintained of available residential units for sale and distribute replacement site referrals for the duration of the Project;
3. Assistance will be offered to displacees in connection with arrangements for the purchase of real property, if applicable, filing of claim forms to request relocation benefits from the City and to obtain services from other public agencies;
4. Special assistance in the form of referrals to governmental and non-governmental agencies will be made, if requested;
5. Eligible displacees will be assisted with the preparation and submission of relocation assistance claims;
6. Benefit determinations and payments will be made in accordance with applicable law and City policy;
7. Assure that displacees are not required to move without a minimum of 90 days written notice to vacate;
8. All persons subject to displacement will be informed of City policies with regard to eviction and property management;
9. A formal grievance procedure will be established and maintained for use by displaced persons seeking administrative review of City decisions with respect to relocation assistance; and

10. Assistance will be provided that does not result in different or separate treatment due to race, color, religion, national origin, sex, marital status or other arbitrary circumstances.

### **C. Relocation Benefits – Residential**

Specific eligibility requirements and benefit plans would be detailed on an individual basis with displacees. In the course of personal interviews and follow-up visits, households would be counseled as to available options with respect to financial assistance.

Relocation benefits will be provided in accordance with the provisions of the federal and state relocation law and regulations. Benefits would be paid to eligible displaced persons upon submission of required claim forms and documentation in accordance with the City's normal administrative procedures.

#### **1. Residential Moving Expense Payments**

All residential occupants that would be relocated would be eligible to receive a payment for moving expenses. Moving expense payments would be made based on the actual cost of a professional move or a fixed payment based on a room-count schedule.

##### **a. Actual Cost (Professional Move)**

The displacee may elect to retain the services of a licensed professional mover, in which case the City would pay for the actual cost of the moving services based on the lower of at least two acceptable bids (the City may, at its discretion, solicit competitive bids to determine the lowest reasonable move cost). After the move is complete, the displacee may pay the mover directly and seek reimbursement from the City, or request a direct payment from the City to the mover.

In addition to the cost of the actual move, one-time expenses associated with utility reconnections (e.g., gas, water, electricity, telephone, cable) would be eligible for reimbursement. Transportation costs would be limited to a distance of 50 miles, unless otherwise authorized by the City.

##### **b. Fixed Payment (based on Room Count Schedule)**

An occupant may elect to receive a fixed payment for moving expenses that is based on the number of rooms occupied in the displacement dwelling. In this case, the person to be relocated takes full responsibility for the move. The fixed payment includes all utility connections as described in Section 1.a above.

At a minimum, the fixed schedule payment for single occupancy efficiency units, furnished with the tenant's own personal property, is \$780, which includes all utility connections at the replacement location. The current schedule for fixed moving payments is provided below in **Table 6**.

**Table 6: Schedule of Fixed Moving Payments**

<b>Furnished Dwelling</b>									
Room Count	1	2	3	4	5	6	7	8	Each Additional
Amount	\$780	\$1,000	\$1,250	\$1,475	\$1,790	\$2,065	\$2,380	\$2,690	\$285
<b>Unfurnished Dwelling</b>									
Room Count	1								Each Additional
Amount	\$510								\$100

Source: URA Moving Cost Schedule (effective August 26, 2021).

## ***2. Rental Assistance to Tenants/Owner-Occupants Who Choose to Rent***

To be eligible to receive the rental assistance benefits, the displaced tenant household must rent or purchase and occupy a decent, safe, and sanitary replacement dwelling within one year from the date they move from the displacement dwelling. Additionally, to qualify for the rental assistance benefits, the tenant-occupant or the owner-occupant must demonstrate that (1) they lived in the property as legal residents for at least 90 consecutive days prior to the City's initial written offer to purchase the property; and (2) the property was their primary residence for that 90-day period.

Based upon the available data regarding Project displacees, the displaced household may qualify for, and may be eligible to apply for, relocation benefits under Federal and State provisions. Except in the case of Last Resort Housing situations (49 CFR 24.404), the potential payment to the household will be payable over a 42-month period and limited to a maximum of \$7,200 as stated under Federal guidelines. The relocation program is explained in detail in the informational brochure to be provided to each permanently displaced household.

Rental/down payment assistance payment amounts are equal to 42 times the difference between the base monthly rent and the lesser of:

1. The monthly rent and estimated average monthly cost of utilities for a comparable replacement dwelling; or
2. The monthly rent and estimated average monthly cost of utilities for the decent, safe, and sanitary replacement dwelling actually occupied by the displaced person.

The base monthly rent for the displacement dwelling is the lesser of:

1. The average monthly cost for rent and utilities at the displacement dwelling for a reasonable period prior to displacement. Average monthly cost of utilities will be determined by actual statements/receipts over a 12 month period or a statement of average usage from the utility company, if provided. The most recent local utility schedule will be used to determine estimated utilities' costs, if actual costs are not



provided. For owner-occupants or households, which paid little or no rent, fair market rent will be used as a substitute for actual rent; or

2. Thirty percent (30%) of the displaced person's average monthly gross household income if the amount is classified as "low income" by US Department of Housing and Urban Development's (HUD) Annual Survey of Income Limits for the Public Housing and Section 8 Programs. HUD's Survey is shown as **Exhibit B**. If a displacee refuses to provide appropriate evidence of income or is a dependent, the base monthly rent shall be determined to be the average monthly cost for rent and utilities at the displacement dwelling; or
3. The total of the amount designated for shelter and utilities if receiving a welfare assistance payment from a program that designated the amounts for shelter and utilities.

**Table 7** below illustrates the computation of a rental/down payment assistance payment amount.

**Table 7: Computation of Rental Assistance Payments**

1. Old Rent	\$650	Old Rent, plus Utility Allowance
<b>OR</b>		
2. Ability to Pay	\$700	30% of the Gross Household Income*
3. Lesser of Lines 1 or 2	<b>\$650</b>	Base Monthly Rental
<b>Subtracted From:</b>		
4. Actual New Rent	\$750	Actual New Rent including Utility Allowance
<b>OR</b>		
5. Comparable Rent	\$775	Determined by the City; includes Utility Allowance
6. Lesser of Lines 4 or 5	<b>\$750</b>	
<b>7. Yields Monthly Need:</b>	<b>\$100</b>	Subtract Line 3 from Line 6
Rental Assistance	\$4,200	<b>Multiply Line 7 by 42 Months</b>
*Gross income means the total amount of annual income of a household less the following: (1) a deduction for each dependent in excess of three; (2) a deduction of 10% of total income for the elderly or disabled head of household; (3) a deduction for recurring extraordinary medical expenses defined for this purpose to mean medical expenses in excess of 3% of total income, where not compensated for, or covered by insurance or other sources; (4) a deduction of reasonable amounts paid for the care of children or sick or incapacitate family members when determined to be necessary to employment of head of household or spouse, except that the amount shall not exceed the amount of income received by the person who would not otherwise be able to seek employment in the absence of such care.		

### **3. Down payment Assistance to Tenants Who Choose to Purchase**

The displaced household may opt to apply the entire benefit amount for which they are eligible toward the purchase of a replacement unit.

A displaced household, who chooses to utilize up to the full amount of their rental assistance eligibility (including any Last Resort benefits) to purchase a home, will have the funds deposited in an open escrow account, provided that the entire amount is used for the down payment and eligible, incidental costs associated with the purchase of a decent, safe, and sanitary replacement home. A provision shall be made in the escrow arrangements for



the prompt return of the City funds, in the event escrow should fail to close within a reasonable period of time.

Final determination about the type of relocation benefits and assistance for which the household is eligible will be determined upon verification of the household's occupants and income.

Federal laws and guidelines provide a basic entitlement of up to \$31,000 to compensate the owner for 1) purchase price differential; 2) mortgage interest differential (if applicable); and, 3) incidental expenses.

#### ***a. Price Difference Differential***

The Purchase Price Differential is based on three factors:

Acquisition Price: The price paid by the City of Santa Ana for the Project dwelling;

Actual Purchase Price: The actual price paid for a replacement dwelling, and;

Comparable Replacement Cost: The cost of a decent, safe, and sanitary dwelling comparable to the dwelling acquired by the City of Santa Ana.

The purchase price differential amount is determined by comparing the price of the acquired dwelling (including any proceeds obtained through condemnation) to the lesser of the actual cost paid for a replacement home versus the price of the comparable dwelling used to compute eligibility in the Notice of Eligibility (NOE) issued to the displaced owner.

#### ***b. Mortgage Interest Differential***

The purpose of the Mortgage Interest Differential Payment is to compensate homeowners for increased costs between the acquired dwelling and the replacement dwelling. The payment for increased mortgage interest cost shall be the amount that would reduce the mortgage balance on a new mortgage to an amount that could be amortized with the same monthly payment for principal and interest as that for the mortgage(s) on the displacement dwelling. In addition, payments shall include other debt service costs, if not paid as part of incidental costs. To be eligible for this payment, the mortgage on the dwelling being acquired must have been in place, as a valid lien, for at least 90 days prior to the City's initial written offer to purchase.

#### ***c. Incidental Expenses – Closing Costs***

One-time, non-recurring closing costs associated with the purchase of a comparable, replacement dwelling are compensable. Examples of such compensable expenses include costs for: a property survey; preparation of a legal description and deed; recording fees; title insurance; revenue stamps and transfer taxes; loan application fees; loan origination fees; appraisal fees; a credit report; certification for structural soundness; and, termite inspection, when required. Prepaid recurring expenses for mortgage interest, property taxes and insurance are not compensable.

The total Relocation Housing Payment (RHP) is the sum of the Purchase Price Differential, Mortgage Interest Differential, and compensable Incidental Expenses.

#### **D. Last Resort Housing**

Based on data derived from the surveys and analyses of the occupants on the Project site and costs of replacement housing resources, it is anticipated that “comparable replacement housing” will not be available as required for some tenants. Specifically, for renters, when the computed replacement housing assistance eligibility exceeds \$7,200 or replacement dwelling monthly rental costs (including utilities and other reasonable recurring expenses) exceeds 30% of the person’s average monthly income.

Therefore, if the Project proceeds, the City will authorize sufficient funds to provide housing of last resort. Due to the demonstrated number of available replacement housing resources, as shown earlier, the need to develop a replacement housing plan to produce sufficient number of comparable replacement dwellings will not be necessary. Rather, funds will be used to make payments in excess of the monetary limits specified in the statute (\$7,200); hence, satisfying the requirement that “comparable replacement housing” is available.

The City will pay Last Resort Housing payments in two installments. Recipients of Last Resort rental assistance, who intend to purchase rather than re-rent replacement housing, will have the right to request a lump sum payment of all benefits in the form of downpayment assistance. Tenant households receiving periodic payments will have the option to request a lump sum payment of remaining benefits to assist with the purchase of a decent, safe and sanitary dwelling.

#### **E. Determinations of Comparable Housing**

Relocation staff would evaluate the cost of comparable replacement housing in the preparation of each individual NOE issued to residential displacees. For residential tenants and owner-occupants, the cost of comparable replacement housing would be determined primarily on a comparative basis of three, if possible, presently available, comparable dwellings. A Comparable Housing Analysis (CHA) Form would be prepared and placed in the file of each affected household.

#### **F. General Information Regarding the Payment of Relocation Benefits**

Claims and supporting documentation for relocation benefits must be filed with the City no later than 18 months after:

- For tenants, the date of displacement; or
- For owners, the date of displacement or the date on which final payment for the acquisition of real property is made, whichever is later.

The procedure for the preparation and filing of claims and the processing and delivery of payments would be as follows:

1. Claimant(s) would provide all necessary documentation to substantiate eligibility for assistance;

2. Relocation staff would review all necessary documentation including, but not limited to, scopes-of-services, contractor bids, invoices, lease documents and escrow material before reaching a determination as to which expenses are eligible for compensation;
3. Required claim forms would be prepared by relocation staff and presented to the claimant for review. Signed claims and supporting documentation would be returned to relocation staff and submitted to the City;
4. The City would review and approve claims for payment, or request additional information;
5. The City would issue benefit checks to claimants in the most secure, expeditious manner possible;
6. Final payments to residential displacees would be issued after confirmation that the Project premises have been completely vacated, and actual residency at the replacement unit is verified;
7. Receipts of payment and all claim material would be maintained in the relocation case file.

### **G. Immigration Status**

Federal legislation (PL105-117) prohibits the payment of relocation assistance benefits under the Uniform Act to any alien not lawfully present in the United States unless such ineligibility would result in an exceptional and extremely unusual hardship to the alien's spouse, parent, or child any of whom is a citizen or an alien admitted for permanent residence. Exceptional and extremely unusual hardship is defined as significant and demonstrable adverse impact on the health or safety, continued existence of the family unit, and any other impact determined by the City to negatively affect the alien's spouse, parent or child.

In order to track and account for relocation assistance and benefit payments, relocation staff will be required to seek immigration status information from each displacee 18 years and older by having them self-certify as to their legal status.

There is no legal presence requirement in order to be eligible for relocation assistance under the State Relocation Program.

### **H. Relocation Tax Consequences**

In general, relocation payments are not considered income for the purpose of Division 2 of the Internal Revenue Code of 1954, which has been redesignated as the Internal Revenue Code of 1986 (Title 26, U. S. Code), or for the purpose of determining the eligibility or the extent of eligibility of any person for assistance under the Social Security Act (42 U. S. Code 301 et seq.) or the Personal Income Tax Law, Part 10 (commencing with Section 17001) of the Revenue and Taxation Code, or the Bank and Corporation Tax Law, Part II (commencing

with Section 23001) of Division 2 of the Revenue and Taxation Code. The above statement on tax consequences is not intended as tax advice by the City or Monument. Displacees are responsible for consulting with their own tax advisors concerning the tax consequences of relocation payments.

### **I. Title VI – the City’s Non-Discrimination Policy**

Title VI of the Civil Rights Act of 1964 requires that no person in the United States, on the grounds of race, color or national origin be excluded from, be denied the benefits of, or be subjected to discrimination under any program or activity receiving federal financial assistance. Presidential Executive Order 12898 addresses environmental justice in minority and low-income populations. Presidential Executive Order 13166 addresses services to those individuals with limited English proficiency. Any person who believes that they have been excluded from, denied the benefits of, or been subjected to discrimination may file a written complaint with the City. Federal and state law requires complaints be filed within one-hundred eighty (180) calendar days of the last alleged incident. To request additional information on the City’s non-discrimination obligations or to file a Title VI Complaint please contact your Relocation Agent. Should language assistance be required, it will be provided at no cost. A Relocation Agent can arrange assistance for language assistance upon request.

### **J. Fair Housing Laws**

Title VI of the Civil Rights Act of 1964 and Title VIII of the Civil Rights Act of 1968 set forth the policy of the United States to provide, within constitutional limitations, fair housing throughout the United States. These Acts and Executive Order 11063 make discriminatory practices in the purchase and rental of residential units illegal if based on race, color, religion, sex, or national origin. Whenever possible, minority persons shall be given reasonable opportunities to relocate to decent, safe, and sanitary housing, not located in an area of minority concentration, that are within their financial means. This policy, however, does not require the City to provide a person a larger payment than what may already be necessary to enable a person to relocate to a comparable replacement dwelling.

Please understand that this is a summary of the assistance that may be available to eligible displaced persons. No summary relocation law can anticipate every circumstance or question regarding the Relocation Program. It is important that each household works closely with a Relocation Agent to identify any special circumstances that need to be addressed when searching for replacement housing. No household should commit to renting or purchasing a replacement dwelling until the home has been inspected by a Relocation Agent. A Relocation Agent is available to assist in the relocation process and will explain each person’s rights and help to obtain the relocation payments and other assistance for which they are eligible.

## V. Administrative Provisions

### A. Notices

Each notice that the City is required to provide to a property owner or occupant shall be personally delivered or sent via certified or registered first-class mail, return receipt requested and documented in each case file. Each notice would be written in plain, understandable language. Persons who are unable to read and understand any notice would be provided with appropriate translation and counseling. Each notice would indicate the name and telephone number of a person who may be contacted for answers to questions or other help.

There are three principal notices:

1. General Information Notice (GIN),
2. Notice of Relocation Eligibility (NOE), and
3. 90-Day Informational or Vacate Notice

The GIN is intended to provide potential displacees with a general written description of the City's relocation program and basic information concerning benefits, conditions of eligibility, noticing requirements and appeal rights. The GIN would be issued at the time the properties are being appraised.

NOEs would be distributed to each residential displacee. The NOEs, both tenants and owner-occupants, contains a determination of eligibility for relocation assistance and a computation of maximum entitlement based on information provided by the affected household and the analyses of comparable replacement properties undertaken by relocation staff. NOEs would be issued promptly following the initiation of negotiation (ION) with property owners.

No lawful occupant would be required to move without having received at least 90 days' advance written notice of the earliest date by which the move would be necessary. The 90-day vacate notice would either state a specific date as the earliest date by which the occupant may be required to move, or state that the occupant would receive a further notice indicating, at least 60 days in advance for residential tenants and 30 days in advance for owner-occupants and non-residential occupants, the specific date of the required move. The 90-day vacate notice would not be issued to any residential displacees before a comparable replacement dwelling has been made available.

In addition to the three principal relocation notices previously identified, relocation staff would issue timely written notification in the form of a Reminder Notice, which discusses the possible loss of rights and sets the expiration date for the loss of benefits to those persons who:

1. Are eligible for monetary benefits,
2. Have moved from the acquired property, and
3. Have not filed a claim for benefits.

Reminder Notices would be issued periodically throughout the qualification period. An attempt shall be made to make written contact with all non-responsive displacees no later than within the last six months prior to the expiration date to file a claim for benefits.

## **B. Privacy of Records**

All information obtained from displacees is considered confidential and would not be shared without the consent of the displacee or the City or as a requirement of a specific Public Records Request in accordance with federal and state law. Relocation staff would comply with federal regulations concerning the safeguarding of relocation files and their contents.

## **C. Grievance Procedures**

A person who is dissatisfied with a determination as to eligibility for benefits, a payment amount, the failure to provide comparable replacement housing referrals, or the City's property management practices must file an appeal form or any other written form of appeal with the City's Right-of-Way Project Manager or his/her designee (Hearing Officer).

The Hearing Officer shall set a hearing date of no later than 30 days from receipt of the appeal. The person making the appeal shall have:

1. The right to present oral and/or written evidence in support of the appeal,
2. The right to seek legal counsel (hired at the appellant's sole expense), and
3. The right to seek judicial review once having exhausted all administrative appeal remedies.

The Hearing Officer shall render a decision, in writing, within 30 days following the last day of the hearing. A copy of the decision would be mailed, via certified or registered mail, to the appellant and his/her authorized representative and copies would be filed in the relocation case file. The decision of the Hearing Officer shall be final, and the appellant shall be advised of the right to seek judicial review of the Hearing Officer's decision.

## **D. Eviction Policy**

Eviction for cause must conform to applicable federal, state and local law. Any person, who occupies the real property and is in lawful occupancy on the date of the ION, is presumed to be entitled to relocation payments and other assistance, unless the City determines that:

1. The person received an eviction notice prior to the ION and as a result of that notice is later evicted, or
2. The person is evicted after the ION for serious or repeated violation of material term(s) of the lease or occupancy agreement, and
3. In either case, the eviction was not undertaken for the purpose of evading the obligation to make available the payments or other assistance to which a person may otherwise be entitled.

## E. Citizen Participation

The City conducted several public hearings for the Project on the following dates: June 16, 2020, August 12, 2021, and; July 24, 2021. As the process for implementing the Project advances, the City will observe the following protocol:

1. Provide affected tenants with full and timely access to documents relevant to the relocation program;
2. Encourage meaningful participation in reviewing the relocation plan and monitoring the relocation assistance program; including the occupants in the Project area, neighborhood groups and community organizations forming a relocation committee;
3. Provide technical assistance necessary to interpret elements of this Plan and other pertinent materials;
4. Issue a general notice concerning the availability of the Plan for public review, as required,
5. 30 days prior to its proposed adoption;

## F. Projected Dates of Displacement

The City has approved acquisition and relocation activities, which began in October 2021 and would be completed no later than the fall of 2022, with construction scheduled to begin in spring of 2023, and the Project is anticipated to be completed by summer of 2025.

## G. Estimated Relocation Costs

The total budget estimated for relocation-related payments for this Project, including a 20% contingency, is as follows:

Relocation:	\$ 400,000
Contingency at 20%:	<u>\$ 80,000</u>
<b>Total:</b>	<b>\$ 480,000</b>

The estimated relocation budget does not include any payments related to property acquisition, improvements pertaining to realty, or loss of business goodwill. In addition, the budget does not consider the cost of any services necessary to implement the Plan and complete the relocation element of the Project.

If the Project is to be implemented, and circumstances arise that change the number of residential occupants or the nature of their activity, the City would authorize any additional, compensable funds that may need to be appropriated. The City pledges to appropriate, on a timely basis, the funds necessary to ensure the successful completion of the Project, including funds necessary for LRH as indicated in Section IV.D, of this Plan to meet its obligation under the relocation regulation.



## Exhibit A

### Residential Interview Form

<b>Residential Relocation Interview</b>	
<b>Client/Project:</b> City of Santa Ana - Fairview Bridge Replacement and Street Improvements (9th Street to 16th Street)	<b>Case ID:</b>
<b>Site Address:</b>	<b>Total occupants:</b> <b>Interview Date:</b> <input type="checkbox"/> Unoccupied
<b>City, St, ZIP:</b>	<b>Interviewer:</b> <input type="checkbox"/> No Contact
<b>INDIVIDUAL OCCUPANTS (use additional pages as needed)</b>	
<div style="display: flex; justify-content: space-between;"> <span><b>1 Name:</b></span> <span>Gender: F M</span> <span>Employer/School:</span> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span>Relationship (list 1): <b>HEAD OF HOUSEHOLD</b></span> <span><input type="checkbox"/> ID verified</span> <span>Income srce (list 2):</span> <span>Income/empl. description:</span> <span>Hire/start date:</span> <span>Mo Income:</span> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span>Lawful presence (list 3):</span> <span>Date of birth:</span> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span>Phone/fax/email:</span> <span>Move-in date:</span> </div> <div style="margin-top: 10px;">Notes/special needs:</div>	
<div style="display: flex; justify-content: space-between;"> <span><b>2 Name:</b></span> <span>Gender: F M</span> <span>Employer/School:</span> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span>Relationship (list 1):</span> <span><input type="checkbox"/> ID verified</span> <span>Income srce (list 2):</span> <span>Income/empl. description:</span> <span>Hire/start date:</span> <span>Mo Income:</span> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span>Lawful presence (list 3):</span> <span>Date of birth:</span> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span>Phone/fax/email:</span> <span>Move-in date:</span> </div> <div style="margin-top: 10px;">Notes/special needs:</div>	
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<b>DWELLING</b> <b>Mailing Address:</b> City, St, ZIP: <b>Carbon Copy Address:</b> City, St, ZIP: Dwelling Type (list 4): <table border="1"> <tr> <td>Bedrooms:</td> <td>Attic/Utility/Storage:</td> <td>Approx Sq Ft:</td> </tr> <tr> <td>Kitchen:</td> <td>Basement:</td> <td>Bathrooms:</td> </tr> <tr> <td>Living/family rooms:</td> <td>Garage:</td> <td>Garage Spaces:</td> </tr> <tr> <td>Dining room:</td> <td>Other/Extra:</td> <td>Carport Spaces:</td> </tr> <tr> <td>Den/Office:</td> <td><b>Total physical and content rooms to move:</b></td> <td>Parking Spaces:</td> </tr> <tr> <td><b>Total Rooms:</b></td> <td></td> <td>Number of cars:</td> </tr> </table> Air Cond: <input type="checkbox"/> Central <input type="checkbox"/> Wall/Window <input type="checkbox"/> Heat Pump <input type="checkbox"/> Evap./Swamp <input type="checkbox"/> None Heating: <input type="checkbox"/> FAU <input type="checkbox"/> Radiant <input type="checkbox"/> Hot Water <input type="checkbox"/> Space Htr <input type="checkbox"/> Solar <input type="checkbox"/> Heat Pump Dwelling Condition: <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Neighborhood Condition: <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor Amenities:			Bedrooms:	Attic/Utility/Storage:	Approx Sq Ft:	Kitchen:	Basement:	Bathrooms:	Living/family rooms:	Garage:	Garage Spaces:	Dining room:	Other/Extra:	Carport Spaces:	Den/Office:	<b>Total physical and content rooms to move:</b>	Parking Spaces:	<b>Total Rooms:</b>		Number of cars:	<b>HOUSEHOLD</b> <input type="checkbox"/> Primary residence of all occupants? (If not, explain in notes) <input type="checkbox"/> Can someone read/understand English? If not, language: Race/Ethnicity: <input type="checkbox"/> American Indian/Alaskan <input type="checkbox"/> Asian <input type="checkbox"/> Black/African-American <input type="checkbox"/> Hawaiian/Pacific Islander <input type="checkbox"/> Hispanic/Latino <input type="checkbox"/> White <input type="checkbox"/> Other <input type="checkbox"/> Mixed Subscribe to: <input type="checkbox"/> Land phone <input type="checkbox"/> TV service <input type="checkbox"/> Internet <input type="checkbox"/> Home-based business? (describe in notes) <input type="checkbox"/> Rent rooms in dwelling? (describe in notes) <input type="checkbox"/> On fixed income or public assistance? (describe in Occupants) <input type="checkbox"/> Disabled occupants? (describe modifications/needs in Occupants) <b>Replacement site special needs (mark and describe in Notes)</b> <input type="checkbox"/> Employment access <input type="checkbox"/> Shopping <input type="checkbox"/> Public transport <input type="checkbox"/> Religious <input type="checkbox"/> Medical facilities/services <input type="checkbox"/> Social/Public services <input type="checkbox"/> School needs <input type="checkbox"/> Relatives/Ethnic <input type="checkbox"/> Childcare <input type="checkbox"/> Other special needs <input type="checkbox"/> All occupants to move to the same dwelling? (if not, explain in notes) Replacement dwelling preference: <input type="checkbox"/> Rent <input type="checkbox"/> Buy Can relocate from: <input type="checkbox"/> Neighborhood <input type="checkbox"/> City <input type="checkbox"/> County <input type="checkbox"/> State Preferred relocation areas:		
Bedrooms:	Attic/Utility/Storage:	Approx Sq Ft:																					
Kitchen:	Basement:	Bathrooms:																					
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<b>Total Rooms:</b>		Number of cars:																					
<b>TENANT</b> Rent terms: <input type="checkbox"/> Month-Month <input type="checkbox"/> Lease, months left <input type="checkbox"/> Rent reduced in exchange for service <input type="checkbox"/> Unit furnished by tenant Monthly contract rent: \$ Security deposit: \$ Landlord/manager name/ph: <input type="checkbox"/> Written rental agreement available? <input type="checkbox"/> Rent receipts available? <input type="checkbox"/> Receiving Section 8 or other housing assistance? Caseworker name/ph: Monthly tenant portion of rent: \$ Annual family/child care expenses to allow work: \$ Annual non-reimbursed medical expenses: \$ Annual non-reimb. handicapped assistance expenses: \$ <b>Utilities paid by tenant:</b> Pets: <input type="checkbox"/> Gas: \$ <input type="checkbox"/> Electric: \$ <b>Energy source:</b> Gas Electr Oil Other <input type="checkbox"/> Water: \$ Cooking Stove: <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Sewer: \$ Water Heater: <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Trash: \$ Space Heat: <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> NONE Air Conditioning: <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>			<b>HOMEOWNER</b> Lot size (sq ft): Date purchased: Age (yrs): <input type="checkbox"/> Own clear, no mortg/loans <input type="checkbox"/> Negative equity # of stories: <table border="1"> <thead> <tr> <th>1st Loan Information</th> <th>2nd Loan Information</th> </tr> </thead> <tbody> <tr> <td>Lender:</td> <td>Lender:</td> </tr> <tr> <td>Loan Type (list 5):</td> <td>Loan Type (list 5):</td> </tr> <tr> <td>Current % Rate:</td> <td>Current % Rate:</td> </tr> <tr> <td>Principal Balance: \$</td> <td>Principal Balance: \$</td> </tr> <tr> <td>Original Date:</td> <td>Original Date:</td> </tr> <tr> <td>Remaining months:</td> <td>Remaining months:</td> </tr> <tr> <td>Monthly P&amp;I payment:</td> <td>Monthly P&amp;I payment:</td> </tr> </tbody> </table> <b>MOBILE HOME</b> Pad space: <input type="checkbox"/> Rent <input type="checkbox"/> Own Coach: <input type="checkbox"/> Rent <input type="checkbox"/> Own Pad rent: \$ Make/Model: Coach length (ft): Year: Coach width (ft): Decal #:			1st Loan Information	2nd Loan Information	Lender:	Lender:	Loan Type (list 5):	Loan Type (list 5):	Current % Rate:	Current % Rate:	Principal Balance: \$	Principal Balance: \$	Original Date:	Original Date:	Remaining months:	Remaining months:	Monthly P&I payment:	Monthly P&I payment:		
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Original Date:	Original Date:																						
Remaining months:	Remaining months:																						
Monthly P&I payment:	Monthly P&I payment:																						

**INTERVIEW NOTES (explain all special dwelling/household circumstances, including those noted on page 2)**

1. **Relation:** Spouse, Child, Foster Child, Parent, Partner, Sibling, Aunt/Uncle, Cousin, Grandparent, Parent In-Law, Sibling In-Law, Other Relative, Roommate  
2. **Income:** Wages/Salaries, Social Security/Disab/Pension, Child Support/Alimony, Welfare/TANF/AFDC, Family Subsidy/Gift, Business Income, Interest/Dividends, Unempl./Workers Comp, AF pay, EITC, Cash Income, Rent Reduction, Other  
3. **Legal Status:** Unknown, Citizen/National, Lawful Other, NOT Lawful, Decline to provide.  
4. **Dwelling:** SFR, Duplex, 3-Plex, 4-Plex, Apartment, Condo/Townhome, Hotel/Motel, Mobile Home, RV, Other  
5. **Loans:** Fixed Mortgage, Adjustable Mortgage, Interest Only, Fixed HELOC, Adjustable HELOC, Reverse Mortgage, Other

***I certify that all occupants have been identified above and that all information provided for this survey is true and complete to the best of my knowledge.***

Claimant Name:

Date:

Signature:

## Exhibit B

### HCD Income Limits – Orange County

STATE OF CALIFORNIA - BUSINESS, CONSUMER SERVICES AND HOUSING AGENCY

GAVIN NEWSOM, Governor

**DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT  
DIVISION OF HOUSING POLICY DEVELOPMENT**

2020 W. El Camino Avenue, Suite 500  
Sacramento, CA 95833  
(916) 263-2911 / FAX (916) 263-7453  
[www.hcd.ca.gov](http://www.hcd.ca.gov)



December 31, 2021

**MEMORANDUM FOR:** Interested parties

A handwritten signature in black ink, appearing to read "Megan Kirkeby".

**FROM:** Megan Kirkeby, Deputy Director  
Division of Housing Policy Development**SUBJECT:** Revised State Income Limits for 2021

Attached are briefing materials and Revised State Income Limits for 2021 that are now in effect, replacing the previous 2021 State Income Limits. Income limits have been updated in response to Chapter 345, Statutes of 2021 (Assembly Bill 1043) and reflect updated median income and household income levels for acutely low-, extremely low-, very low-, low-, and moderate-income households for California's 58 counties. The 2021 State Income Limits are on the Department of Housing and Community Development (HCD) website at <http://www.hcd.ca.gov/grants-funding/income-limits/state-and-federal-income-limits.shtml>.

State Income Limits apply to designated programs, are used to determine applicant eligibility (based on the level of household income) and may be used to calculate affordable housing costs for applicable housing assistance programs. Use of State Income Limits are subject to a particular program's definition of income, family, family size, effective dates, and other factors. In addition, definitions applicable to income categories, criteria, and geographic areas sometimes differ depending on the funding source and program, resulting in some programs using other income limits.

The attached briefing materials detail California's 2021 Income Limits and were updated based on: (1) changes to income limits the U.S. Department of Housing and Urban Development (HUD) released on April 1, 2021 for its Public Housing, Section 8, Section 202 and Section 811 programs and (2) adjustments HCD made based on State statutory provisions and its 2013 Hold Harmless (HH) Policy. Since 2013, HCD's HH Policy has held State Income Limits harmless from any decreases in household income limits and median income levels that HUD may apply to the Public Housing and Section 8 Income Limits. HUD determined its HH Policy was no longer necessary due to federal law changes in 2008 (Public Law 110-98) prohibiting rent decreases in federal or private activity bond funded projects.

For questions concerning State Income Limits, please see the Questions and Answers on page 5. You can also contact HCD staff at (916) 263-2911.



## **Revised 2021 State Income Limits Briefing Materials California Code of Regulations, Title 25, Section 6932**

### **Overview**

The Department of Housing and Community Development (HCD), pursuant to Health & Safety Code Section 50093(c), must file updates to its State Income Limits with the Office of Administrative Law. HCD annually updates these income limits based on U.S. Department of Housing and Urban Development (HUD) revisions to the Public Housing and Section 8 Income Limits that HUD released on April 1, 2021.

HUD annually updates its Public Housing and Section 8 Income Limits to reflect changes in median family income levels for different size households and income limits for extremely low-, very low-, and low-income households. HCD, pursuant to statutory provisions, makes the following additional revisions: (1) if necessary, increase a county's area median income to equal California's non-metropolitan median income, (2) adjusts area median income and household income category levels to not result in any decrease for any year after 2009 pursuant to HCD's February 2013 Hold Harmless (HH) Policy. HCD's HH Policy was implemented to replace HUD's HH Policy, discontinued in 2009, to not decrease income limits and area median income levels below a prior year's highest level and, (3) determines income limits for California's moderate-income category.

Following are brief summaries of technical methodologies used by HUD and HCD in updating income limits for different household income categories. For additional information, please refer to HUD's briefing materials at <https://www.huduser.gov/portal/datasets/il/il21/IncomeLimitsMethodology-FY21.pdf>.

### **HUD Methodology**

HUD Public Housing and Section 8 Income Limits begin with the production of median family incomes. HUD uses the Section 8 program's Fair Market Rent (FMR) area definitions in developing median incomes, which means developing median incomes for each metropolitan area, parts of some metropolitan areas, and each non-metropolitan county. The 2021 FMR area definitions for California are unchanged from last year. HUD calculates Income Limits for every FMR area with adjustments for family size and for areas with unusually high or low family income or housing-cost-to-income relationships.

#### ***Extremely Low-Income***

In determining the extremely low-income limit, HUD uses the Federal Poverty Guidelines, published by the Department of Health and Human Services. The poverty guidelines are a simplified version of the federal poverty thresholds used for administrative purposes — for instance, determining financial eligibility for certain federal programs. HUD compares the appropriate poverty guideline with 60% of the very low-income limit and chooses the greater of the two as the Extremely Low-Income limit. The value may not exceed the very low-income level.

#### ***Very Low-Income***

The very low-income limits are the basis for all other income limits. The very low-income limit typically reflects 50 percent of median family income (MFI) and HUD's MFI figure generally equals two times HUD's 4-person very low-income limit. HUD may adjust the very low-income limit for an area or county to account for conditions that warrant special considerations. As such, the very low-income limit may not always equal 50% MFI.

#### ***Low-Income***

In general, most low-income limits represent the higher level of: (1) 80 percent of MFI or, (2) 80 percent of state non-metropolitan median family income. However, due to adjustments that HUD sometimes makes to the very low-income limit, strictly calculating low-income limits as 80 percent of MFI could produce unintended anomalies inconsistent with statutory intent (e.g. very low-income limits being



**Revised 2021 State Income Limits Briefing Materials**  
**California Code of Regulations, Title 25, Section 6932**

higher than low-income limits). Therefore, HUD's briefing materials specify that, with some exceptions, the low-income limit reflect 160 percent of the very low-income limit.

HUD may apply additional adjustments to areas with unusually high or low housing-costs-to-income relationships and for other reasons. This can result in low-income limits exceeding MFI in certain counties.

***Median Family Income/Area Median Income***

HUD references and estimates the MFI in calculating the income limits. California law and State Income Limits reference Area Median Income (AMI) that, pursuant to Health & Safety Code 50093(c), means the MFI of a geographic area, estimated by HUD for its Section 8 Program.

HUD's calculations of Income Limits begin with the production of MFI estimates.

This year, MFI estimates use the 2018 American Community Survey. HUD then adjusts the survey data to account for anticipated income growth by applying the Consumer Price Index inflation forecast published by the Congressional Budget Office through the midpoint of FY 2021. HUD uses the MFI to calculate very low-income limits, used as the basis to calculate income limits for other income categories. MFI's are calculated at the family level only, not the per person level as is done for income limits. The average family size is over 3, so, by convention, HUD equates the median family income for an area with a four-person family for the purposes of calculating income limits. For additional information, please see HUD's methodology describing 2021 MFI's at

<https://www.huduser.gov/portal/datasets/il/il21/Medians-Methodology-FY21.pdf>.

***Adjustment Calculations***

HUD may apply adjustments to areas with unusually high or low family income, uneven housing-cost-to-income relationship, or other reasons. For example, HUD applies an increase if the four-person very low-income limit would otherwise be less than the amount at which 35 percent of it equals 85 percent of the annualized two-bedroom Section 8 FMR (or 40<sup>th</sup> percentile rent in 50<sup>th</sup> percentile FMR areas). The purpose is to increase the income limit for areas where rental-housing costs are unusually high in relation to the median income.

In certain cases, HUD also applies an adjustment to the income limits based on the state non-metropolitan median family income level. In addition, HUD restricts adjustments, so income limits do not increase more than five percent of the previous year's very low-income figure OR twice the increase in the national MFI, whichever is greater. For the 2021 income limits, the maximum increase is 5% from the previous year. This adjustment does not apply to the extremely low-income limits.

Please refer to HUD briefing materials for additional information on the adjustment calculations.

***Income Limit Calculations for Household Sizes Other Than 4-Persons***

The income limit statute requires adjustments for family size. The legislative history and conference committee report indicates that Congress intended that income limits should be higher for larger families and lower for smaller families. The same family size adjustments apply to all income limits, except extremely low-income limits, which are set at the poverty income threshold. They are as follows:

Number of Persons in Household:	1	2	3	4	5	6	7	8
Adjustments:	70%	80%	90%	Base	108%	116%	124%	132%

***Income Limit Calculations for Household Sizes Greater Than 8-Persons***

For households of more than eight persons, refer to the formula at the end of the table for 2021 Income Limits. Due to the adjustments HUD can make to income limits in a given county, table data should be the only method used to determine program eligibility. Arithmetic calculations are applicable only when a



### **Revised 2021 State Income Limits Briefing Materials California Code of Regulations, Title 25, Section 6932**

household has more than eight members. Please refer to HUD's briefing material for additional information on family size adjustments.

#### **HCD Methodology**

State law (Health & Safety Code Section 50093, et. seq.) prescribes the methodology HCD uses to update the State Income Limits. HCD utilizes HUD's Public Housing and Section 8 Income Limits. HCD's methodology involves: (1) if necessary, increasing a county's median income established by HUD to equal California's non-metropolitan county median income determined by HUD, (2) applying HCD's HH Policy, in effect since 2013, to not allow decreases in area median income levels and household income category levels, (3) applying to the median income the same family size adjustments HUD applies to the income limits, and (4) determining income limit levels applicable to California's moderate-income households defined by law as household income not exceeding 120 percent of county area median income.

#### ***Area Median Income and Income Category Levels***

HCD, pursuant to federal and State law, adjusts median income levels for all counties so they are not less than the non-metropolitan county median income established by HUD (\$69,700 for 2021). Next, HCD applies its HH policy to ensure area median income and income limits for all household income categories do not fall below any level achieved in the prior year. Health and Safety Code section 50093 requires HCD to adjust the AMI for family size in accordance with adjustment factors adopted by HUD and illustrated on the previous page. This establishes that the MFI published by HUD equals the four-person AMI for California counties.

#### ***Acutely low-Income Levels***

Chapter 345, Statutes of 2021 (Assembly Bill 1043) established California's acutely low-income levels. After calculating the 4-person area median income (AMI) level as previously described, HCD sets the maximum acutely low-income limit to equal 15 percent of the county's AMI, adjusted for family size.

#### ***Moderate-Income Levels***

HCD is responsible for establishing California's moderate-income limit levels. After calculating the 4-person area median income (AMI) level as previously described, HCD sets the maximum moderate-income limit to equal 120 percent of the county's AMI, adjusted for family size.

#### ***Applicability of California's Official State Income Limits***

Applicability of the State Income Limits are subject to particular programs as program definitions of factors such as income, family, and household size vary. Some programs, such as Multifamily Tax Subsidy Projects (MTSPs), use different income limits. For MTSPs, separate income limits apply per provisions of the Housing and Economic Recovery Act (HERA) of 2008 (Public Law 110-289). Income limits for MTSPs are used to determine qualification levels as well as set maximum rental rates for projects funded with tax credits authorized under Section 42 of the Internal Revenue Code (Code). In addition, MTSP income limits apply to projects financed with tax-exempt housing bonds issued to provide qualified residential rental development under Section 142 of the Code. These income limits are available at <http://www.huduser.org/datasets/mtsp.html>.

## **Revised 2021 State Income Limits Briefing Materials California Code of Regulations, Title 25, Section 6932**

### **Questions and Answers**

#### **In Los Angeles, as well as several other counties in the state, why does the very low-income limit not equal 50% of the AMI (or the low-income limit not equal 80% of the AMI)?**

There are many exceptions to the arithmetic calculation of income limits. These include adjustments for high housing cost relative to income, the application of state nonmetropolitan income limits in low-income areas, and national maximums in high-income areas. **In Los Angeles County, the magnitude of these adjustments results in the low-income limit exceeding the AMI.** These exceptions are detailed in the FY 2021 Income Limits Methodology

Document, [https://www.huduser.gov/portal/datasets/il.html#2021\\_data](https://www.huduser.gov/portal/datasets/il.html#2021_data).

For further information on the exact adjustments made to an individual area of the country, please see HUD's FY 2021 Income Limits Documentation System. The documentation system is available at [https://www.huduser.gov/portal/datasets/il.html#2021\\_query](https://www.huduser.gov/portal/datasets/il.html#2021_query). Once the area in question is selected, a summary of the area's median income, Very Low-Income, Extremely Low-Income, and Low-Income Limits are displayed. Detailed calculations are obtained by selecting the relevant links.

#### **Why don't the income limits for my area reflect recent gains?**

Although HUD uses the most recent data available concerning local area incomes, there is still a lag between when the data are collected and when the data are available for use. For example, FY 2021 Income Limits are calculated using 2014-2018 5-year American Community Survey (ACS) data, and one-year 2017 data where possible. This is a two-year lag, so more current trends in median family income levels are not available.

#### **How does HUD calculate Median Family Income (MFI)?**

HUD estimates Median Family Income (MFI) annually for each metropolitan area and non-metropolitan county. The basis for HUD's median family incomes is data from the American Community Survey, table B19113 - MEDIAN FAMILY INCOME IN THE PAST 12 MONTHS. A Consumer Price Index (CPI) forecast as published by the Congressional Budget Office is used in the trend factor calculation to bring the 2018 ACS data forward to the middle of FY 2021.

For additional details concerning the use of the ACS in HUD's calculations of MFI, please see our FY 2021 Median Family Income methodology document, at [https://www.huduser.gov/portal/datasets/il.html#2021\\_data](https://www.huduser.gov/portal/datasets/il.html#2021_data).

Additionally, full documentation of all calculations for Median Family Incomes are available in the FY 2021 Median Family Income and the FY 2021 Income Limits Documentation System. These systems are available at [https://www.huduser.gov/portal/datasets/il.html#2021\\_query](https://www.huduser.gov/portal/datasets/il.html#2021_query).

#### **Why didn't the income limits for my county change from last year?**

HCD's Hold Harmless Policy likely prevented the income limits from decreasing from last year's levels and has maintained them despite a decrease in median income and/or income limits published by HUD.

#### **Why do the income limits or area median income for my county not match what was published by HUD?**

HCD adjusts each county's area median income to at least equal the state non-metropolitan county median income, as published by HUD. Further, HCD's Hold Harmless Policy prevents any decrease in income limits or median family income published by HUD to be applied to State Income Limits.



**Section 6932. 2021 Income Limits**

Number of Persons in Household:	1	2	3	4	5	6	7	8
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Last page instructs how to use income limits to determine applicant eligibility and calculate affordable housing cost and rent

Alameda County Area Median Income: \$125,600	Acutely Low	13200	15100	16950	18850	20350	21850	23350	24900
	Extremely Low	28800	32900	37000	41100	44400	47700	51000	54300
	Very Low Income	47950	54800	61650	68500	74000	79500	84950	90450
	Low Income	76750	87700	98650	109600	118400	127150	135950	144700
	<b>Median Income</b>	87900	100500	113050	<b>125600</b>	135650	145700	155750	165800
	Moderate Income	105500	120550	135650	150700	162750	174800	186850	198900

Alpine County Area Median Income: \$94,900	Acutely Low	10000	11400	12850	14250	15400	16550	17650	18800
	Extremely Low	18150	20750	23350	26500	31040	35580	40120	44660
	Very Low Income	30250	34600	38900	43200	46700	50150	53600	57050
	Low Income	46600	53250	59900	66550	71900	77200	82550	87850
	<b>Median Income</b>	66450	75900	85400	<b>94900</b>	102500	110100	117700	125250
	Moderate Income	79750	91100	102500	113900	123000	132100	141250	150350

Amador County Area Median Income: \$78,700	Acutely Low	8250	9450	10600	11800	12750	13700	14650	15600
	Extremely Low	16550	18900	21960	26500	31040	35580	40120	44660
	Very Low Income	27550	31500	35450	39350	42500	45650	48800	51950
	Low Income	44100	50400	56700	62950	68000	73050	78100	83100
	<b>Median Income</b>	55100	62950	70850	<b>78700</b>	85000	91300	97600	103900
	Moderate Income	66100	75550	85000	94450	102000	109550	117100	124650

Butte County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14850	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24750	28300	31850	35350	38200	41050	43850	46700
	Low Income	39600	45250	50900	56550	61100	65600	70150	74650
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000

Calaveras County Area Median Income: \$81,700	Acutely Low	8600	9800	11050	12250	13250	14200	15200	16150
	Extremely Low	17150	19600	22050	26500	31040	35580	40120	44660
	Very Low Income	28600	32700	36800	40850	44150	47400	50700	53950
	Low Income	45750	52300	58850	65350	70600	75850	81050	86300
	<b>Median Income</b>	57200	65350	73550	<b>81700</b>	88250	94750	101300	107850
	Moderate Income	68650	78450	88250	98050	105900	113750	121600	129450

Colusa County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000

Contra Costa County Area Median Income: \$125,600	Acutely Low	13200	15100	16950	18850	20350	21850	23350	24900
	Extremely Low	28800	32900	37000	41100	44400	47700	51000	54300
	Very Low Income	47950	54800	61650	68500	74000	79500	84950	90450
	Low Income	76750	87700	98650	109600	118400	127150	135950	144700
	<b>Median Income</b>	87900	100500	113050	<b>125600</b>	135650	145700	155750	165800
	Moderate Income	105500	120550	135650	150700	162750	174800	186850	198900



Number of Persons in Household:		1	2	3	4	5	6	7	8
Del Norte County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
El Dorado County Area Median Income: \$91,100	Acutely Low	9550	10900	12300	13650	14750	15850	16950	18000
	Extremely Low	19050	21800	24500	27200	31040	35580	40120	44660
	Very Low Income	31750	36250	40800	45300	48950	52550	56200	59800
	Low Income	50750	58000	65250	72500	78300	84100	89900	95700
	<b>Median Income</b>	63750	72900	82000	<b>91100</b>	98400	105700	112950	120250
	Moderate Income	76500	87450	98350	109300	118050	126800	135550	144300
Fresno County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Glenn County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Humboldt County Area Median Income: \$72,000	Acutely Low	7550	8650	9700	10800	11650	12550	13400	14250
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	50400	57600	64800	<b>72000</b>	77750	83500	89300	95050
	Moderate Income	60500	69100	77750	86400	93300	100200	107150	114050
Imperial County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Inyo County Area Median Income: \$75,100	Acutely Low	7850	9000	10150	11250	12150	13050	13950	14850
	Extremely Low	15800	18050	21960	26500	31040	35580	40120	44660
	Very Low Income	26300	30050	33800	37550	40600	43600	46600	49600
	Low Income	42100	48100	54100	60100	64950	69750	74550	79350
	<b>Median Income</b>	52550	60100	67600	<b>75100</b>	81100	87100	93100	99150
	Moderate Income	63050	72100	81100	90100	97300	104500	111700	118950



Number of Persons in Household:		1	2	3	4	5	6	7	8
Kern County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Kings County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Lake County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Lassen County Area Median Income: \$72,200	Acutely Low	7600	8700	9750	10850	11700	12600	13450	14300
	Extremely Low	15200	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	25300	28900	32500	36100	39000	41900	44800	47700
	Low Income	40450	46200	52000	57750	62400	67000	71650	76250
	<b>Median Income</b>	50550	57750	65000	<b>72200</b>	78000	83750	89550	95300
	Moderate Income	60650	69300	78000	86650	93600	100500	107450	114400
Los Angeles County Area Median Income: \$80,000	Acutely Low	8400	9600	10800	12000	12950	13900	14900	15850
	Extremely Low	24850	28400	31950	35450	38300	41150	44000	46800
	Very Low Income	41400	47300	53200	59100	63850	68600	73300	78050
	Low Income	66250	75700	85150	94600	102200	109750	117350	124900
	<b>Median Income</b>	56000	64000	72000	<b>80000</b>	86400	92800	99200	105600
	Moderate Income	67200	76800	86400	96000	103700	111350	119050	126700
Madera County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Marin County Area Median Income: \$149,600	Acutely Low	15700	17950	20200	22450	24250	26050	27850	29650
	Extremely Low	38400	43850	49350	54800	59200	63600	68000	72350
	Very Low Income	63950	73100	82250	91350	98700	106000	113300	120600
	Low Income	102450	117100	131750	146350	158100	169800	181500	193200
	<b>Median Income</b>	104700	119700	134650	<b>149600</b>	161550	173550	185500	197450
	Moderate Income	125650	143600	161550	179500	193850	208200	222600	236950



Number of Persons in Household:		1	2	3	4	5	6	7	8
Mariposa County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Mendocino County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	15200	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	25350	28950	32550	36150	39050	41950	44850	47750
	Low Income	40500	46300	52100	57850	62500	67150	71750	76400
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Merced County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Modoc County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Mono County Area Median Income: \$81,200	Acutely Low	8550	9750	11000	12200	13200	14150	15150	16100
	Extremely Low	17050	19500	21960	26500	31040	35580	40120	44660
	Very Low Income	28450	32500	36550	40600	43850	47100	50350	53600
	Low Income	45300	51800	58250	64700	69900	75100	80250	85450
	<b>Median Income</b>	56850	64950	73100	<b>81200</b>	87700	94200	100700	107200
	Moderate Income	68200	77950	87700	97450	105250	113050	120850	128650
Monterey County Area Median Income: \$81,600	Acutely Low	8600	9800	11050	12250	13250	14200	15200	16150
	Extremely Low	21350	24400	27450	30500	32950	35580	40120	44660
	Very Low Income	35600	40700	45800	50850	54950	59000	63100	67150
	Low Income	56950	65100	73250	81350	87900	94400	100900	107400
	<b>Median Income</b>	57100	65300	73450	<b>81600</b>	88150	94650	101200	107700
	Moderate Income	68550	78300	88100	97900	105750	113550	121400	129250
Napa County Area Median Income: \$109,200	Acutely Low	11500	13100	14750	16400	17700	19000	20350	21650
	Extremely Low	23900	27300	30700	34100	36850	39600	42300	45050
	Very Low Income	39800	45500	51200	56850	61400	65950	70500	75050
	Low Income	63050	72050	81050	90050	97300	104500	111700	118900
	<b>Median Income</b>	76450	87350	98300	<b>109200</b>	117950	126650	135400	144150
	Moderate Income	91750	104850	117950	131050	141550	152000	162500	173000



Number of Persons in Household:		1	2	3	4	5	6	7	8
Nevada County Area Median Income: \$92,400	Acutely Low	9700	11100	12450	13850	14950	16050	17150	18300
	Extremely Low	18900	21600	24300	26950	31040	35580	40120	44660
	Very Low Income	31450	35950	40450	44900	48500	52100	55700	59300
	Low Income	50300	57500	64700	71850	77600	83350	89100	94850
	<b>Median Income</b>	64700	73900	83150	<b>92400</b>	99800	107200	114600	121950
	Moderate Income	77650	88700	99800	110900	119750	128650	137500	146400
Orange County Area Median Income: \$106,700	Acutely Low	11200	12800	14400	16000	17300	18550	19850	21100
	Extremely Low	28250	32300	36350	40350	43600	46850	50050	53300
	Very Low Income	47100	53800	60550	67250	72650	78050	83400	88800
	Low Income	75300	86050	96800	107550	116200	124800	133400	142000
	<b>Median Income</b>	74700	85350	96050	<b>106700</b>	115250	123750	132300	140850
	Moderate Income	89650	102450	115250	128050	138300	148550	158800	169050
Placer County Area Median Income: \$91,100	Acutely Low	9550	10900	12300	13650	14750	15850	16950	18000
	Extremely Low	19050	21800	24500	27200	31040	35580	40120	44660
	Very Low Income	31750	36250	40800	45300	48950	52550	56200	59800
	Low Income	50750	58000	65250	72500	78300	84100	89900	95700
	<b>Median Income</b>	63750	72900	82000	<b>91100</b>	98400	105700	112950	120250
	Moderate Income	76500	87450	98350	109300	118050	126800	135550	144300
Plumas County Area Median Income: \$73,100	Acutely Low	7650	8750	9850	10950	11850	12700	13600	14450
	Extremely Low	15400	17600	21960	26500	31040	35580	40120	44660
	Very Low Income	25600	29250	32900	36550	39500	42400	45350	48250
	Low Income	40950	46800	52650	58500	63200	67900	72550	77250
	<b>Median Income</b>	51150	58500	65800	<b>73100</b>	78950	84800	90650	96500
	Moderate Income	61400	70150	78950	87700	94700	101750	108750	115750
Riverside County Area Median Income: \$77,500	Acutely Low	8150	9300	10500	11650	12600	13500	14450	15400
	Extremely Low	16600	19000	21960	26500	31040	35580	40120	44660
	Very Low Income	27650	31600	35550	39500	42700	45850	49000	52150
	Low Income	44250	50600	56900	63200	68300	73350	78400	83450
	<b>Median Income</b>	54250	62000	69750	<b>77500</b>	83700	89900	96100	102300
	Moderate Income	65100	74400	83700	93000	100450	107900	115300	122750
Sacramento County Area Median Income: \$91,100	Acutely Low	9550	10900	12300	13650	14750	15850	16950	18000
	Extremely Low	19050	21800	24500	27200	31040	35580	40120	44660
	Very Low Income	31750	36250	40800	45300	48950	52550	56200	59800
	Low Income	50750	58000	65250	72500	78300	84100	89900	95700
	<b>Median Income</b>	63750	72900	82000	<b>91100</b>	98400	105700	112950	120250
	Moderate Income	76500	87450	98350	109300	118050	126800	135550	144300
San Benito County Area Median Income: \$90,700	Acutely Low	9500	10900	12250	13600	14700	15800	16850	17950
	Extremely Low	21450	24500	27550	30600	33050	35580	40120	44660
	Very Low Income	35700	40800	45900	51000	55100	59200	63250	67350
	Low Income	57150	65300	73450	81600	88150	94700	101200	107750
	<b>Median Income</b>	63500	72550	81650	<b>90700</b>	97950	105200	112450	119700
	Moderate Income	76200	87100	97950	108850	117550	126250	134950	143700



Number of Persons in Household:		1	2	3	4	5	6	7	8
San Bernardino County Area Median Income: \$77,500	Acutely Low	8150	9300	10500	11650	12600	13500	14450	15400
	Extremely Low	16600	19000	21960	26500	31040	35580	40120	44660
	Very Low Income	27650	31600	35550	39500	42700	45850	49000	52150
	Low Income	44250	50600	56900	63200	68300	73350	78400	83450
	<b>Median Income</b>	54250	62000	69750	<b>77500</b>	83700	89900	96100	102300
	Moderate Income	65100	74400	83700	93000	100450	107900	115300	122750
San Diego County Area Median Income: \$95,100	Acutely Low	10000	11400	12850	14250	15400	16550	17650	18800
	Extremely Low	25450	29100	32750	36350	39300	42200	45100	48000
	Very Low Income	42450	48500	54550	60600	65450	70300	75150	80000
	Low Income	67900	77600	87300	97000	104800	112550	120300	128050
	<b>Median Income</b>	66550	76100	85600	<b>95100</b>	102700	110300	117900	125550
	Moderate Income	79850	91300	102700	114100	123250	132350	141500	150600
San Francisco County Area Median Income: \$149,600	Acutely Low	15700	17950	20200	22450	24250	26050	27850	29650
	Extremely Low	38400	43850	49350	54800	59200	63600	68000	72350
	Very Low Income	63950	73100	82250	91350	98700	106000	113300	120600
	Low Income	102450	117100	131750	146350	158100	169800	181500	193200
	<b>Median Income</b>	104700	119700	134650	<b>149600</b>	161550	173550	185500	197450
	Moderate Income	125650	143600	161550	179500	193850	208200	222600	236950
San Joaquin County Area Median Income: \$75,000	Acutely Low	7850	9000	10150	11250	12150	13050	13950	14850
	Extremely Low	15750	18000	21960	26500	31040	35580	40120	44660
	Very Low Income	26250	30000	33750	37500	40500	43500	46500	49500
	Low Income	42000	48000	54000	60000	64800	69600	74400	79200
	<b>Median Income</b>	52500	60000	67500	<b>75000</b>	81000	87000	93000	99000
	Moderate Income	63000	72000	81000	90000	97200	104400	111600	118800
San Luis Obispo County Area Median Income: \$97,800	Acutely Low	10250	11700	13200	14650	15800	17000	18150	19350
	Extremely Low	20550	23500	26450	29350	31700	35580	40120	44660
	Very Low Income	34250	39150	44050	48900	52850	56750	60650	64550
	Low Income	54800	62600	70450	78250	84550	90800	97050	103300
	<b>Median Income</b>	68450	78250	88000	<b>97800</b>	105600	113450	121250	129100
	Moderate Income	82150	93900	105600	117350	126750	136150	145500	154900
San Mateo County Area Median Income: \$149,600	Acutely Low	15700	17950	20200	22450	24250	26050	27850	29650
	Extremely Low	38400	43850	49350	54800	59200	63600	68000	72350
	Very Low Income	63950	73100	82250	91350	98700	106000	113300	120600
	Low Income	102450	117100	131750	146350	158100	169800	181500	193200
	<b>Median Income</b>	104700	119700	134650	<b>149600</b>	161550	173550	185500	197450
	Moderate Income	125650	143600	161550	179500	193850	208200	222600	236950
Santa Barbara County Area Median Income: \$90,100	Acutely Low	9450	10800	12150	13500	14600	15650	16750	17800
	Extremely Low	26250	30000	33750	37450	40450	43450	46450	49450
	Very Low Income	43750	50000	56250	62450	67450	72450	77450	82450
	Low Income	70050	80050	90050	100050	108100	116100	124100	132100
	<b>Median Income</b>	63050	72100	81100	<b>90100</b>	97300	104500	111700	118950
	Moderate Income	75650	86500	97300	108100	116750	125400	134050	142700



Number of Persons in Household:		1	2	3	4	5	6	7	8
Santa Clara County Area Median Income: \$151,300	Acutely Low	15900	18150	20450	22700	24500	26350	28150	29950
	Extremely Low	34800	39800	44750	49700	53700	57700	61650	65650
	Very Low Income	58000	66300	74600	82850	89500	96150	102750	109400
	Low Income	82450	94200	106000	117750	127200	136600	146050	155450
	<b>Median Income</b>	105900	121050	136150	<b>151300</b>	163400	175500	187600	199700
	Moderate Income	127100	145250	163400	181550	196050	210600	225100	239650
Santa Cruz County Area Median Income: \$111,900	Acutely Low	11750	13450	15100	16800	18150	19500	20850	22200
	Extremely Low	29200	33400	37550	41700	45050	48400	51750	55050
	Very Low Income	48650	55600	62550	69500	75100	80650	86200	91750
	Low Income	78050	89200	100350	111500	120450	129350	138300	147200
	<b>Median Income</b>	78350	89500	100700	<b>111900</b>	120850	129800	138750	147700
	Moderate Income	94000	107450	120850	134300	145050	155800	166550	177300
Shasta County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14950	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24850	28400	31950	35500	38350	41200	44050	46900
	Low Income	39800	45450	51150	56800	61350	65900	70450	75000
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Sierra County Area Median Income: \$84,800	Acutely Low	8900	10150	11450	12700	13700	14750	15750	16750
	Extremely Low	17750	20300	22850	26500	31040	35580	40120	44660
	Very Low Income	29600	33800	38050	42250	45650	49050	52400	55800
	Low Income	47350	54100	60850	67600	73050	78450	83850	89250
	<b>Median Income</b>	59350	67850	76300	<b>84800</b>	91600	98350	105150	111950
	Moderate Income	71250	81400	91600	101750	109900	118050	126150	134300
Siskiyou County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Solano County Area Median Income: \$99,300	Acutely Low	10450	11900	13400	14900	16100	17300	18500	19650
	Extremely Low	20450	23350	26250	29150	31500	35580	40120	44660
	Very Low Income	34000	38850	43700	48550	52450	56350	60250	64100
	Low Income	54350	62100	69850	77600	83850	90050	96250	102450
	<b>Median Income</b>	69500	79450	89350	<b>99300</b>	107250	115200	123150	131100
	Moderate Income	83400	95300	107250	119150	128700	138200	147750	157300
Sonoma County Area Median Income: \$103,300	Acutely Low	10850	12400	13950	15500	16750	18000	19200	20450
	Extremely Low	24450	27950	31450	34900	37700	40500	43300	46100
	Very Low Income	40750	46550	52350	58150	62850	67500	72150	76800
	Low Income	65150	74450	83750	93050	100500	107950	115400	122850
	<b>Median Income</b>	72300	82650	92950	<b>103300</b>	111550	119850	128100	136350
	Moderate Income	86750	99150	111550	123950	133850	143800	153700	163600



Number of Persons in Household:		1	2	3	4	5	6	7	8
Stanislaus County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	15000	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	25000	28550	32100	35650	38550	41400	44250	47100
	Low Income	39950	45650	51350	57050	61650	66200	70750	75350
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Sutter County Area Median Income: \$75,000	Acutely Low	7850	9000	10150	11250	12150	13050	13950	14850
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	52500	60000	67500	<b>75000</b>	81000	87000	93000	99000
	Moderate Income	63000	72000	81000	90000	97200	104400	111600	118800
Tehama County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Trinity County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Tulare County Area Median Income: \$70,700	Acutely Low	7400	8500	9550	10600	11450	12300	13150	14000
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	49500	56550	63650	<b>70700</b>	76350	82000	87650	93300
	Moderate Income	59400	67900	76350	84850	91650	98450	105200	112000
Tuolumne County Area Median Income: \$75,600	Acutely Low	7950	9100	10200	11350	12250	13150	14050	15000
	Extremely Low	15650	17850	21960	26500	31040	35580	40120	44660
	Very Low Income	26050	29800	33500	37200	40200	43200	46150	49150
	Low Income	41650	47600	53550	59500	64300	69050	73800	78550
	<b>Median Income</b>	52900	60500	68050	<b>75600</b>	81650	87700	93750	99800
	Moderate Income	63500	72550	81650	90700	97950	105200	112450	119700
Ventura County Area Median Income: \$98,800	Acutely Low	10350	11850	13300	14800	16000	17150	18350	19550
	Extremely Low	23700	27100	30500	33850	36600	39300	42000	44700
	Very Low Income	39550	45200	50850	56450	61000	65500	70000	74550
	Low Income	63250	72300	81350	90350	97600	104850	112050	119300
	<b>Median Income</b>	69150	79050	88900	<b>98800</b>	106700	114600	122500	130400
	Moderate Income	83000	94850	106700	118550	128050	137500	147000	156500

Number of Persons in Household:		1	2	3	4	5	6	7	8
Yolo County Area Median Income: \$92,500	Acutely Low	9750	11100	12500	13900	15000	16100	17250	18350
	Extremely Low	19450	22200	25000	27750	31040	35580	40120	44660
	Very Low Income	32400	37000	41650	46250	49950	53650	57350	61050
	Low Income	51800	59200	66600	74000	79950	85850	91800	97700
	<b>Median Income</b>	64750	74000	83250	<b>92500</b>	99900	107300	114700	122100
	Moderate Income	77700	88800	99900	111000	119900	128750	137650	146500
Yuba County Area Median Income: \$75,000	Acutely Low	7850	9000	10150	11250	12150	13050	13950	14850
	Extremely Low	14700	17420	21960	26500	31040	35580	40120	44660
	Very Low Income	24500	28000	31500	34950	37750	40550	43350	46150
	Low Income	39150	44750	50350	55900	60400	64850	69350	73800
	<b>Median Income</b>	52500	60000	67500	<b>75000</b>	81000	87000	93000	99000
	Moderate Income	63000	72000	81000	90000	97200	104400	111600	118800

**Instructions:****Eligibility Determination:**

Use household size income category figures in this chart. Determine eligibility based on actual number of persons in household and total of gross income for all persons.

**Determination of Income Limit for Households Larger than Eight Persons:**

Per person (PP) adjustment above 8: (1) multiply 4-person income limit by eight percent (8%),  
(2) multiply result by number of persons in excess of eight,  
(3) add the amount to the 8-person income limit, and (4) round to the nearest \$50.

**Nine Person Calculation - Example County**

E X A M P L E	4 persons	8% PP Adj	+ 8 person	=9 persons
Acutely Low	11,250	900	14,850	15,750
Extremely Low	26,500	2120	44,660	46,800
Very Low Income	34,950	2796	46,150	48,950
Lower Income	55,900	4472	73,800	78,250
Moderate Income	90,000	7200	118,800	126,000

**Ten Person Calculation - Example County**

4 persons	8 person +	8% Adj x 2	=10 persons
11,250	14,850	1800	16,650
26,500	44,660	4240	48,900
34,950	46,150	5592	51,750
55,900	73,800	8944	82,750
90,000	118,800	14400	133,200

**Calculation of Housing Cost and Rent:**

Refer to Health & Safety Code Sections 50052.5 and 50053. Use benchmark household size and multiply against applicable percentages defined in H&SC using Area Median Income identified in this chart.

**Determination of Household Size:**

For projects with no federal assistance, household size is set at number of bedrooms in unit plus one.

For projects with federal assistance, household size may be set by multiplying 1.5 by the number of bedrooms in unit.

**HUD Income Limits release: 4/1/2021**

HUD FY 2021 California median incomes:

State median income: \$90,100

Metropolitan county median income: \$90,600

Non-metropolitan county median income: \$69,700

Note: Authority cited: Section 50093, Health and Safety Code. Reference: Sections 50063.5, 50079.5, 50093, 50105 and 50106, Health and Safety Code.



## Exhibit C

### Homes for Sale and Rent Listings

Duplex/SFRs for Sale in Santa Ana (10 Miles Radius)			
Address	Bedrooms	Listing Price	Median Price
2143 Kilson Dr, Santa Ana	3	\$674,900.00	\$847,450.00
2618 W Borchard Ave, Santa Ana	3	\$710,000.00	
417 S Flower St # 1, Santa Ana	3	\$710,000.00	
303 N McClay St, Santa Ana	3	\$724,900.00	
1649 W Pine St, Santa Ana	3	\$747,000.00	
13336 Dunklee Ave, Garden Grove	3	\$750,000.00	
12042 Hackamore Rd, Garden Grove	3	\$775,000.00	
2605 S Raitt St, Santa Ana	3	\$799,900.00	
15101 Brighton St, Westminster	3	\$799,900.00	
1905 N Linwood Ave, Santa Ana	3	\$822,000.00	
12242 Choisser Rd, Garden Grove	3	\$845,000.00	
12381 Santa Rosalia St, Garden Grove	3	\$849,900.00	
10422 Stern Ave, Westminster	3	\$850,000.00	
1621 Bullard Ln, Santa Ana	3	\$899,000.00	
3102 Ramona Dr, Santa Ana	3	\$925,000.00	
13531 Newland St, Westminster	3	\$945,000.00	
5510 Como Ave, Santa Ana	Duplex	\$950,000.00	
7772 22nd St, Westminster	3	\$950,000.00	
13151 Buckingham Cir, Westminster	3	\$985,000.00	
8915 Aberdeen Ln, Garden Grove	3	\$998,000.00	
2637 Jessee Dr, Santa Ana	3	\$1,049,000.00	
9151 Carl Ln, Garden Grove	3	\$1,250,000.00	

Duplex/SFRs for Rent in Santa Ana (10 Miles Radius)			
Address	Bedrooms	Listing Price	Median Price
1601 W Macarthur Blvd, Santa Ana	Room	\$700.00	\$850.00
Camilie and Halladay, Santa Ana	Room	\$700.00	
17 St, Santa Ana	Room	\$825.00	
South Newhope Street, Santa Ana	Room	\$850.00	
South Parton Street, Santa Ana	Room	\$850.00	
Floral Park, Santa Ana	Room	\$950.00	
Lawson Way, Santa Ana	Room	\$1,300.00	
Sussex Place, Santa Ana	Room	\$1,300.00	
East Dyer Road, Santa Ana	Room	\$1,550.00	
Apartments/Duplexs for Rent in Santa Ana (10 Miles Radius)			
Address	Bedrooms	Listing Price	Median Price
1224 S Pacific Ave #5, Santa Ana	1	\$1,375.00	\$1,975.00
1206 E Stafford St #G, Santa Ana	1	\$1,450.00	
1832 W Crestwood Ln, Apt 4, Anaheim	1	\$1,525.00	
11541 Stuart Dr, Garden Grove	1	\$1,600.00	
611 N Bristol St, Santa Ana	1	\$1,695.00	
450 E 4th St APT 441, Santa Ana	1	\$1,695.00	
1313 W Memory Ln, Santa Ana	1	\$1,795.00	
1114 W Santa Ana Blvd APT 26, Santa Ana	1	\$1,895.00	
1345 Cabrillo Park Dr APT K14, Santa Ana	1	\$1,975.00	
15560 Tustin Village Way, Tustin	1	\$2,060.00	
3400 S Main St, Santa Ana	1	\$2,150.00	
15482 Pasadena Ave, Tustin	1	\$2,185.00	
1030 W Macarthur Blvd APT 10, Santa Ana	1	\$2,200.00	
610 S Van Ness Ave, Santa Ana	1	\$2,200.00	
3800 S Flower St, Santa Ana	1	\$2,291.00	
1912 S Jacaranda St, Anaheim	1	\$2,718.00	
3600 Aspen Village Way, Santa Ana	1	\$2,875.00	
Duplexs/Triplexs/Townhomes for Rent in Santa Ana (10 Miles Radius)			
Address	Bedrooms	Listing Price	Median Price
2521 W Sunflower Ave, Santa Ana	3	\$2,650.00	\$3,567.50
2030 E Santa Clara Ave, B, Santa Ana	3	\$2,900.00	
1561 W Walnut St, 56, Santa Ana	3	\$3,100.00	
13271 Verde St, #1, Garden Grove	3	\$3,200.00	
3820 W Kent Ave, Santa Ana	3	\$3,290.00	
638 Springbrook, Irvine	3	\$3,300.00	
14546 Newport Ave, Tustin	3	\$3,350.00	
23 Visalia, Irvine	3	\$3,785.00	
1893 Union St, #122, Anaheim	3	\$3,885.00	
1452 N Harbor Blvd, Santa Ana	3	\$4,150.00	
12696 Homestead, Tustin	3	\$4,200.00	
110 Unity St, Irvine	3	\$4,600.00	
1415 Abelia, Irvine	3	\$5,000.00	
834 E Fairway Dr, Orange	3	\$5,500.00	

## Exhibit D

### Residential Informational Brochure



Relocation Assistance  
Informational Statement for  
Families and Individuals

(Federal) ☐

Displacing Agency:

**City of Santa Ana**

Project Name:

**Fairview Bridge Replacement and Street Improvements  
(9th Street to 16th Street)**

Displacing Agency Representative:



**Monument, Inc.  
200 Spectrum Center, Suite 300  
Irvine, CA 92618  
Phone (800) 577-0109**

#### Informational Statement Content:

1. General Information
2. Assistance in Locating A Replacement Dwelling
3. Moving Benefits
4. Replacement Housing Payment - Tenants & Certain Others
5. Section 8 Tenants
6. Replacement Housing Payment – Homeowners
7. Qualification for And Filing [Of](#) Relocation Claims
8. Last Resort Housing Assistance
9. Rental Agreement
10. Evictions
11. Appeal Procedures – Grievance
12. Tax Status of Relocation Benefits
13. Legal Presence Requirement
14. Non-Discrimination and Fair Housing
15. Additional Information & Assistance Available

**Spanish speaking representatives are available. Si necesita esta información en español, por favor llame a su representante.**





## Informational Statement for Families and Individuals

### **1. GENERAL INFORMATION**

The dwelling in which you now live is in a project area to be improved by, or financed through, the City of Santa Ana (City) using federal funds. If and when the project proceeds, and it is necessary for you to move from your dwelling, you may be eligible for certain benefits. You will be notified in a timely manner as to the date by which you must move. Please read this information, as it will be helpful to you in determining your eligibility and the amount of the relocation benefits you may receive under the federal law. You will need to provide adequate and timely information to determine your relocation benefits. The information is voluntary, but if you don't provide it, you may not receive the benefits, or it may take longer to pay you. We suggest you save this informational statement for reference.

City of Santa Ana has retained the professional firm of **Monument, Inc. (Monument)** to provide relocation assistance to you. The firm is available to explain the program and benefits. Their address and telephone number is listed on the cover.

**PLEASE DO NOT MOVE PREMATURELY. THIS IS NOT A NOTICE TO VACATE YOUR DWELLING.** However, if you desire to move sooner than required, you must contact your representative with Monument, Inc., so you will not jeopardize any benefits. This is a general informational brochure only and is not intended to give a detailed description of either the law or regulations pertaining to the City of Santa Ana's relocation assistance program.

**Please continue to pay your rent to your current landlord, otherwise you may be evicted and jeopardize the relocation benefits to which you may be entitled to receive. Once The City of Santa Ana acquires the property, you will also be required to pay rent to the City.**

### **2. ASSISTANCE IN LOCATING A REPLACEMENT DWELLING**

The City, through its representatives, will assist you in locating a comparable replacement dwelling by providing referrals to appropriate and available housing units. You are encouraged to actively seek such housing yourself. When a suitable replacement dwelling unit has been found, your relocation consultant will carry out an inspection and advise you as to whether the dwelling unit meets decent, safe and sanitary housing requirements. A decent, safe and sanitary housing unit provides adequate space for its occupants, proper weatherproofing and sound heating, electrical and plumbing systems. Your new dwelling must pass inspection before relocation assistance payments can be authorized.

### **3. MOVING BENEFITS**

If you must move as a result of displacement by the City, you will receive a payment to assist in moving your personal property. The actual, reasonable and necessary expenses for moving your household belongings may be determined based on the following methods:

- A Fixed Moving Payment based on the number of rooms you occupy (see below); **or**
- A payment for your Actual Reasonable Moving and Related Expenses based on at least

- two written estimates and receipted bills; **or**
- A combination of both (in some cases).

For example, you may choose a Self-Move, receiving a payment based on the Fixed Residential Moving Cost Schedule shown below, plus contract with a professional mover to transport your grand piano and /or other items that require special handling. In this case, there may be an adjustment in the number of rooms which qualify under the Fixed Residential Moving Cost Schedule.

**A. Fixed Moving Payment (Self Move)**

A Fixed Moving Payment is based upon the number of rooms you occupy and whether or not you own your own furniture. The payment is based upon a schedule approved by the City, and ranges, for example, from \$780.00 for one furnished room to \$2,690.00 for eight rooms. (For details see the table). Your relocation representative will inform you of the amount you are eligible to receive, if you choose this type of payment.

If you select a fixed payment, you will be responsible for arranging for your own move, and the City will assume no liability for any loss or damage of your personal property. A fixed payment also includes utility hook-up, credit check and other related moving fees.

<b>Fixed Moving Schedule CALIFORNIA (Effective 2012)</b>	
<b>Occupant owns furniture:</b>	
1 room	\$780
2 rooms	\$1,000
3 rooms	\$1,250
4 rooms	\$1,475
5 rooms	\$1,790
6 rooms	\$2,065
7 rooms	\$2,380
8 rooms	\$2,690
Each additional room	\$285
<b>Occupant does NOT own furniture:</b>	
1 room	\$510
Each additional room	\$100

**B. Actual Moving Expense (Commercial Move)**

If you wish to engage the services of a licensed commercial mover and have the City pay the bill, you may claim the ACTUAL cost of moving your personal property up to 50 miles. Your relocation representative will inform you of the number of competitive moving bids (if any) which may be required and assist you in developing a "mover" scope of services for City's approval.

#### **4. REPLACEMENT HOUSING PAYMENT – TENANTS AND CERTAIN OTHERS**

You may be eligible for a payment up to \$7,200.00 to assist in renting or purchasing a comparable replacement dwelling. In order to qualify, you must either be a tenant who has occupied the present dwelling for at least 90 days immediately prior to the initiation of negotiations or an owner who has occupied the present dwelling at least 90 days immediately prior to the initiation of negotiations.

- A. Rental Assistance.** If you **wish to rent** your replacement dwelling, your maximum rental assistance benefits will be based upon the difference over a forty-two (42) month period between the rent you must pay for a comparable replacement dwelling and the lesser of your current rent or thirty percent (30%) of your monthly household income if your total gross income is classified as "low income" by the U. S. Department of Housing and Urban Development's (HUD) Annual Survey of Income Limits for Public Housing and Section 8 Programs. You will be required to provide your relocation representative with monthly rent and household income verification prior to the determination of your eligibility for this payment.

**- OR -**



- B. **Down-payment Assistance.** If you qualify and **wish to purchase** a home as a replacement dwelling, you can apply up to the total amount of your rental assistance payment towards the down-payment and non-recurring incidental expenses. Your relocation representative will clarify procedures necessary to apply for this payment.

## **5. SECTION 8 TENANTS**

When you do move, you may be eligible to transfer your Section 8 eligibility to a replacement site. In such cases, a comparable replacement dwelling will be determined based on your family composition at the time of displacement and the current housing program criteria. This may not be the size of the unit you currently occupy. Your relocation representative will provide counseling and other advisory services along with moving benefits.

## **6. REPLACEMENT HOUSING PAYMENT - HOMEOWNERS**

- A. If you own and occupy a dwelling to be purchased by the City for **at least 90 days** prior to the initiation of negotiation, you may be eligible to receive a payment of up to \$31,000.00 to assist you in purchasing a comparable replacement unit. This payment is intended to cover the following items:
1. **Purchase Price Differential** - An amount which, when added to the amount for which the City purchased your property, equals the lesser of the actual cost of your replacement dwelling; **or** the amount determined by the City as necessary to purchase a comparable replacement dwelling. Your relocation representative will explain both methods to you.
  2. **Mortgage Interest Differential** - The amount which covers the increased interest costs, if any, required to finance a replacement dwelling. Your relocation representative will explain limiting conditions.
  3. **Incidental Expenses** - Those one-time incidental costs related to purchasing a replacement unit, such as escrow fees, recording fees, and credit report fees. Recurring expenses such as prepaid taxes and insurance premiums are not compensable.
- B. **Rental Assistance Option** - If you are an owner-occupant and choose to rent rather than purchase a replacement dwelling, you may be eligible for a rental assistance payment of up to the amount that you could have received under the Purchase Price Differential, explained above. The payment will be based on the difference between the fair market rent of the dwelling you occupy and the rent you must pay for a comparable replacement dwelling.

If you receive a rental assistance payment, as described above, and later decide to purchase a replacement dwelling, you may apply for a payment equal to the amount you would have received if you had initially purchased a comparable replacement dwelling, less the amount you have already received as a rental assistance payment.

## **7. QUALIFICATION FOR, AND FILING OF, RELOCATION CLAIMS**

To qualify for a Replacement Housing Payment, you must rent or purchase and occupy a comparable replacement unit **within one year from the following**:

- For a tenant, the date you move from the displacement dwelling.
- For an owner-occupant, the latter of:
  - a. The date you receive final payment for the displacement dwelling, or, in the case of

- condemnation, the date the full amount of estimated just compensation is deposited in court; **or**
- b. The date the City fulfills its obligation to make available comparable replacement dwellings.

All claims for relocation benefits must be filed with the City of Santa Ana **within eighteen (18) months** from the date on which you receive final payment for your property, or the date, on which you move, whichever is later.

### **8. LAST RESORT HOUSING ASSISTANCE**

If comparable replacement dwellings are not available when you are required to move, or if replacement housing is not available within the monetary limits described above, the City will provide Last Resort Housing assistance to enable you to rent or purchase a replacement dwelling on a timely basis. Last Resort Housing assistance is based on the individual circumstances of the displaced person. Your relocation representative will explain the process for determining whether or not you qualify for Last Resort assistance.

If you are a tenant, and you choose to purchase rather than rent a comparable replacement dwelling, the entire amount of your rental assistance and Last Resort eligibility must be applied toward the down-payment and eligible incidental expenses of the home you intend to purchase.

### **9. RENTAL AGREEMENT**

As a result of the City's action to purchase the property where you live, you may become a tenant of the City of Santa Ana. If this occurs, you will be asked to sign a rental agreement which will specify the monthly rent to be paid, when rent payments are due, where they are to be paid and other pertinent information.

### **10. EVICTIONS**

Eviction for cause must conform to applicable State and local law. Any person who occupies the real property and is not in unlawful occupancy on the date of initiation of negotiations, is presumed to be entitled to relocation benefits, unless the City determines that:

- The person received an eviction notice prior to the initiation of negotiations and, as a result, was later evicted; or
- The person is evicted after the initiation of negotiations for serious or repeated violation of material terms of the lease; and
- The eviction was not undertaken for the purpose of evading relocation assistance regulations.

Except for the causes of eviction set forth above, no person lawfully occupying property to be purchased by the City will be required to move without having been provided with at least 90 days written notice from the City of Santa Ana.

### **11. APPEAL PROCEDURES - GRIEVANCE**

Any person aggrieved by a determination as to eligibility for, or the amount of, a payment authorized by the City's Relocation Assistance Program may have the appeal application reviewed by the City of Santa Ana in accordance with its appeals procedure. Complete details on appeal procedures are available upon request from the City.



**12. TAX STATUS OF RELOCATION BENEFITS**

California Government Code Section 7269 indicates no relocation payment received shall be considered as income for the purposes of the Personal Income Tax Law, Part 10 (commencing with Section 170 01) of Division 2 of the Revenue and Taxation Code, or the Bank and Corporation Tax law, Part 11 (commencing with Section 23001) of Division 2 of the Revenue and Taxation Code. Furthermore, federal regulations (49 CFR Part 24, Section 24.209) also indicate that no payment received under this part (Part 24) shall be considered as income for the purpose of the Internal Revenue Code of 1954, which has been redesignated as the Internal Revenue Code of 1986. The preceding statement is not tendered as legal advice in regard to tax consequences, and ~~displacees~~ should consult with their own tax advisor or legal counsel to determine the current status of such payments.

*(IRS Circular 230 disclosure: To ensure compliance with requirements imposed by the IRS, we inform you that any tax advice contained in this communication (including any attachments) was not intended or written to be used, and cannot be used, for the purpose of (i) avoiding tax-related penalties under the Internal Revenue Code or (ii) promoting marketing or recommending to another party any matters addressed herein)*

**13. LAWFUL PRESENCE REQUIREMENT**

In order to be eligible to receive relocation benefits in federally funded relocation projects, all members of the household to be displaced must provide information regarding their lawful presence in the United States. Any member of the household who is not lawfully present in the United States or declines to provide this information may be denied relocation benefits, unless such ineligibility would result in an exceptional and extremely unusual hardship to the alien's spouse, parent, or child, any of whom is a citizen or an alien admitted for permanent residence. Exceptional and extremely unusual hardship is defined as significant and demonstrable adverse impact on the health or safety, continued existence of the family unit, and any other impact determined by the City to negatively affect the alien's spouse, parent or child. Relocation benefits will be prorated to reflect the number of household members with certified lawful presence in the US.

**14. NON-DISCRIMINATION AND FAIR HOUSING**

No person shall on the grounds of race, color, national origin or sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under the City's relocation assistance program pursuant to Title VI of the Civil Rights Act of 1964, Title VIII of the Civil Rights Act of 1968, and other applicable state and federal anti-discrimination and fair housing laws. You may file a complaint if you believe you have been subjected to discrimination. For details contact the City of Santa Ana.

**15. ADDITIONAL INFORMATION AND ASSISTANCE AVAILABLE**

Those responsible for providing you with relocation assistance hope to assist you in every way possible to minimize the hardships involved in relocating to a new home. Your cooperation will be helpful and greatly appreciated. If you have any questions at any time during the process, please do not hesitate to contact your relocation representative at Monument.

## **Exhibit E**

### **Public Comments and Response**

There were no written comments or questions received during the 32-day public review and comment period between Friday, February 11, 2022 and Monday, March 15, 2022.