

# Shalimar Park Expansion Project

## Draft Relocation Plan

Prepared for:

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

## Contents

### Table of Contents

<b>INTRODUCTION .....</b>	<b>1</b>
<b>I. PROJECT AREA DESCRIPTION .....</b>	<b>2</b>
A. REGIONAL LOCATION .....	2
B. PROJECT SITE LOCATION AND DESCRIPTION .....	3
C. GENERAL DEMOGRAPHIC AND HOUSING CHARACTERISTICS .....	4
<b>II. ASSESSMENT OF RELOCATION NEEDS.....</b>	<b>5</b>
A. SURVEY METHODS .....	5
B. FIELD SURVEY DATA – RESIDENTIAL .....	5
1. <i>Housing Mix</i> .....	6
2. <i>Occupancy Standards</i> .....	6
3. <i>Income</i> .....	6
4. <i>Ethnicity/Language</i> .....	7
5. <i>Households with Seniors</i> .....	7
6. <i>Households with Disabilities</i> .....	7
7. <i>Preferred Relocation Areas</i> .....	8
<b>III. RELOCATION RESOURCES .....</b>	<b>8</b>
A. METHODOLOGY .....	8
B. REPLACEMENT HOUSING AVAILABILITY.....	8
1. <i>Residential For-Sale and Rental Housing</i> .....	8
2. <i>Summary</i> .....	9
C. RELATED ISSUES .....	9
1. <i>Concurrent Residential Displacement</i> .....	9
2. <i>Temporary Relocation</i> .....	9
<b>IV. THE RELOCATION PROGRAM .....</b>	<b>10</b>
A. PROGRAM ASSURANCES, STANDARDS AND OBJECTIVES.....	10
B. RELOCATION ADVISORY ASSISTANCE.....	11
C. RELOCATION BENEFITS – RESIDENTIAL .....	12
1. <i>Residential Moving Expense Payments</i> .....	12
2. <i>Rental Assistance to Tenants/Owner-Occupants Who Choose to Rent</i> .....	13
3. <i>Down payment Assistance to Tenants Who Choose to Purchase</i> .....	14
D. LAST RESORT HOUSING .....	15
E. DETERMINATIONS OF COMPARABLE HOUSING .....	15
F. GENERAL INFORMATION REGARDING THE PAYMENT OF RELOCATION BENEFITS .....	16
G. IMMIGRATION STATUS.....	16
H. RELOCATION TAX CONSEQUENCES.....	17
I. TITLE VI – THE CITY’S NON-DISCRIMINATION POLICY.....	17
J. FAIR HOUSING LAWS.....	17
<b>V. ADMINISTRATIVE PROVISIONS.....</b>	<b>20</b>
A. NOTICES .....	20

B.	PRIVACY OF RECORDS.....	21
C.	GRIEVANCE PROCEDURES.....	21
D.	EVICTIION POLICY.....	21
E.	CITIZEN PARTICIPATION .....	22
F.	PROJECTED DATES OF DISPLACEMENT.....	22
G.	ESTIMATED RELOCATION COSTS .....	22

## List of Tables

Table 1:	2020 US Census Population – City of Costa Mesa and Impacted Tract (636.05) .....	4
Table 2:	2020 US Census Housing Units – City of Costa Mesa and Impacted Tract (636.05).....	4
Table 3:	Affected Residential Dwellings.....	6
Table 4:	Availability and Cost of Replacement Rental Housing (Conventional) .....	9
Table 5:	Schedule of Fixed Moving Payments .....	13
Table 6:	Computation of Rental Assistance Payments.....	14

## List of Figures

Figure 1:	<i>Regional Project Location</i> .....	2
Figure 2:	<i>Project Site Location</i> .....	3

## List of Exhibits

Exhibit A:	Residential Interview Form
Exhibit B:	HCD Income Limits – Orange County
Exhibit C:	Rental Listings – Replacement Housing Availability
Exhibit D:	Residential Informational Brochure
Exhibit E:	Public Comments and Response



## Introduction

The City of Costa Mesa (City) plans to acquire the property located at 778 Shalimar Drive, Costa Mesa, CA 92627 for the proposed Shalimar Park Expansion Project (Project). Shalimar Park is an essential part of the community in serving the nearby underserved residents with recreational amenities in an area of the City that is deficient in public park amenities. The City intends to evaluate the use of the property for a variety of community serving uses including the creation of a community center, expansion of the Shalimar Park and/or enhanced affordable housing, among other community uses. This park project is in alignment with the City Council's Strategic Plan objective to identify strategies to increase park access with a focus on the Westside of Costa Mesa.

The Project improvement will require the full acquisition of one (1) property, which is a fourplex, resulting in the permanent displacement of three (3) occupied residential units.

The City has retained Monument Inc. to prepare the Relocation Plan (Plan) in connection with the commencement of the 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 household's 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 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).

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 City of Costa Mesa 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 Costa Mesa within Orange County. Costa Mesa is located approximately 37 miles southeast of the City of Los Angeles and is travelled by Interstate 405 (I-405) and easily accessible by State Routes 73 and 55. Adjacent communities include Santa Ana, Fountain Valley, Huntington Beach, Newport Beach and Irvine. (See Figure 1: Regional Project Location)

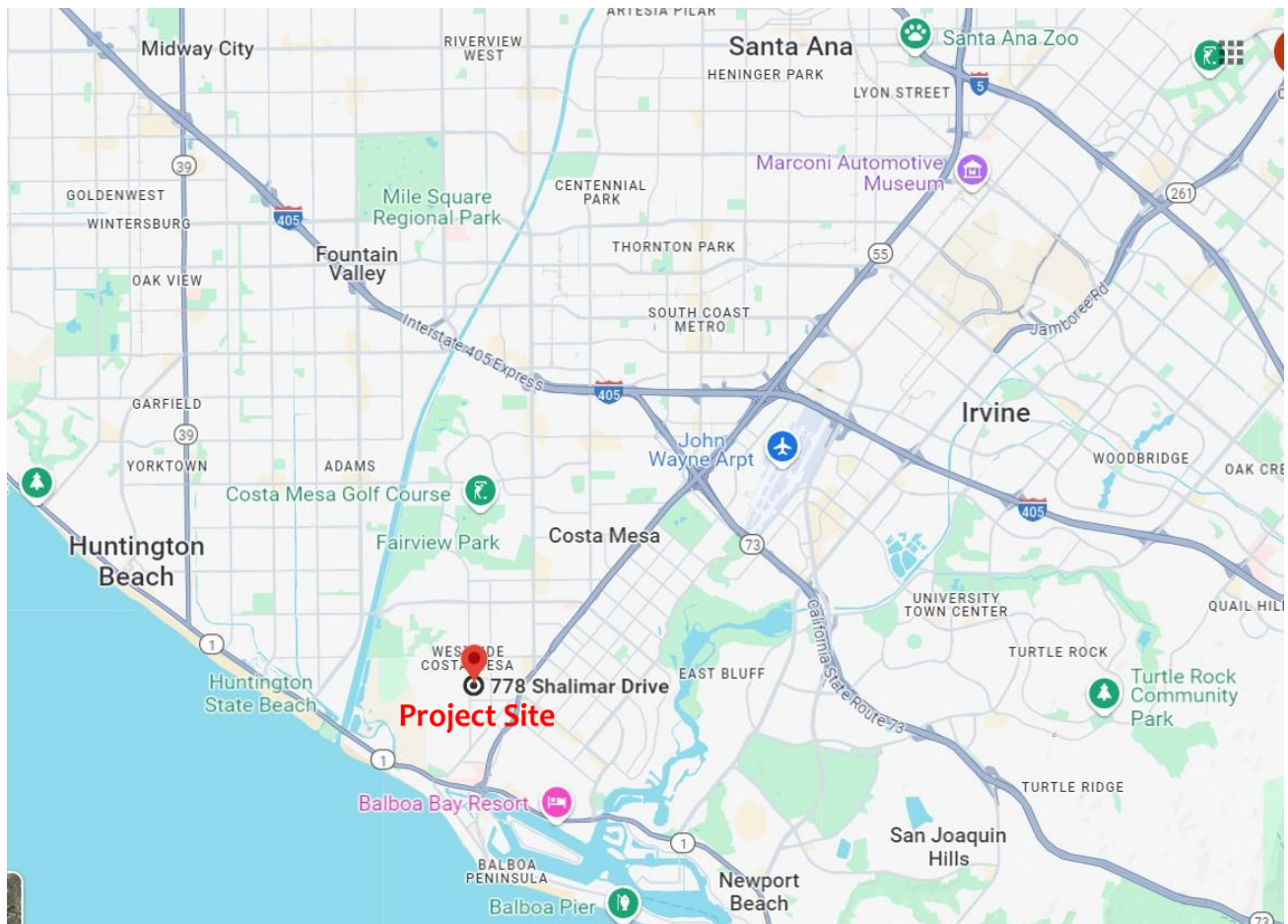


Figure 1: Regional Project Location

## B. Project Site Location and Description

The Project site is on Shalimar Drive. (See *Figure 2: Project Site Location*) The Project Site is located approximately 1.5 miles west of State Route 55 (SR-55), 3.5 miles northeast of Interstate 73 (I-73) and 3.5 miles north of Interstate 405 (I-405). Costa Mesa encompasses a total of 16 square miles with its southernmost border only 1 mile from the Pacific Ocean.



Figure 2: *Project Site Location*

### C. General Demographic and Housing Characteristics

According to the population estimates from the 2020 U.S. Census, the population of the City of Costa Mesa is 111,918, and the population of the impacted Census Tract is 5,630 (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 Costa Mesa and Impacted Tract (636.05)**

Population	Number of Persons	Percentage	City	Percentage
Total population	5,630	100.0%	111,918	100.0%
White alone	1,799	32.0%	57,103	51%
Black or African American alone	52	0.9%	1,734	1.5%
American Indian or Alaskan Native alone	159	2.8%	1,300	1.1%
Asian alone	222	3.9%	9,535	8.5%
Native Hawaiian and Other Pacific Islander alone	4	0.1%	975	0.9%
Two or More Races	1,119	19.9%	18,311	16.4%
Hispanic or Latino (of Any Race)	3,949	70.1%	39,441	35.2%

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 Costa Mesa and Impacted Tract (636.05)**

Type	Number of Units	Percentage	City	Percentage
Total occupied units	1,697	94.9%	41,243	95.7%
Vacant Housing Units	91	5.1%	1,842	4.3%

Source: U.S. Census Bureau, accessed December 20, 2024.



## 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 one residential fourplex dwelling with 3 occupied residential households and one vacant unit. Survey information was obtained from all 3 occupied residential households. 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	No. of Bedrooms	No. of Occupants	Occupancy Type
1	778 Shalimar Dr., Unit # 1 Costa Mesa, CA	Residential	Fourplex	2	5	Tenant
2	778 Shalimar Dr., Unit # 2 Costa Mesa, CA	Residential	Fourplex	2	0 (Vacant Unit)	N/A
3	778 Shalimar Dr., Unit # 3 Costa Mesa, CA	Residential	Fourplex	2	9	Tenant
4	778 Shalimar Dr., Unit # 4 Costa Mesa, CA	Residential	Fourplex	2	5	Tenant

### *1. Housing Mix*

As shown in **Table 3** above, the Project area includes 3 households occupying 1 residential building (fourplex), with two dwelling units occupied by one household each, another dwelling unit occupied by two households and one vacant unit. 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 Costa Mesa 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 2024 low-income limits are defined as follows:

Family Size	1	2	3	4	5	6	7	8
Low Income Limits 2024	\$88,400	\$101,000	\$113,650	\$126,250	\$136,350	\$146,450	\$156,550	\$166,650

Source: Department of Housing and Community Development (HCD) website, accessed December 13, 2024

#### *4. Ethnicity/Language*

Per the 2020 U.S. Census American Community Survey One-Year Estimate, 36.9% of the population in the City of Costa Mesa speaks a language besides English at home. Based on information obtained from the residential interviews of the three displaced households, Spanish 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 2020 U.S. Census American Community Survey One-Year Estimate, 12.3% 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 2020 U.S. Census American Community Survey One-Year Estimate, 8.5%<sup>1</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.

<sup>1</sup> United States Census Bureau web site, accessed December 27, 2024, <https://data.census.gov/>

Based on information obtained from the residential interviews, one household occupant has a disability that requires the use of a manual aided walker device.

### *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 City of Costa Mesa and in the Orange County area.

## **III. Relocation Resources**

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 Rental Housing*

A housing resource survey was conducted to determine the availability of replacement housing within the City of Costa Mesa sufficient to meet the needs of displaced rental tenants.

The replacement housing survey considered available two-bedroom and four-bedroom conventional housing for rent. This data is summarized in **Table 4** below. The conventional housing survey, **Table 4**, identified 54 currently available two-bedroom conventional housing units for rent and 51 currently available four-bedroom conventional housing units for rent. The individual figures for number of units found are presented in the table, 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
2 bedrooms	Single Family Residence	6	Costa Mesa	\$3,000 - \$6,500
2 bedrooms	Condos	3	Costa Mesa	\$3,580 - \$4,900
2 bedrooms	Apartments	45	Costa Mesa	\$2,300 - \$4,800
4 Bedrooms	Single Family Residence	41	Costa Mesa, Garden Grove, Huntington Beach, Santa Ana, Irvine, Westminster	\$4,085-6,000
4 Bedrooms	Condos	9	Costa Mesa, Santa Ana, Irvine, Newport Beach	\$3,500-5,900
4 Bedrooms	Duplex/Triplex/Fourplex	1	Westminster	\$4,500

Source: Multiple Listing Service and Zillow, accessed January 7, 2025 and January 17, 2025.

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.

## 2. Summary

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

Although adequate replacement resources exist based on surveyed results of rental opportunities, and anticipated values of existing dwellings, occupants are anticipated to have increases in monthly rents. 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 2025. 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 Costa Mesa's (City) Relocation Program is designed to minimize hardship, be responsive to unique project circumstances and maintain personal contact with all affected individuals. The program will consistently apply 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 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).

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 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 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, with bilingual services or Spanish speaking assistance available. 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 deemed necessary. Signed acknowledgements will be obtained to verify receipt of this material;
2. A database will be maintained of available residential units for lease and for sale, and referrals will be provided to the displacees 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 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.

##### 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 5.

**Table 5: Schedule of Fixed Moving Payments**

Furnished Dwelling									
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
Unfurnished Dwelling									
Room Count	1								Each Additional
Amount	\$510								\$100

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

## ***2. Rental Assistance to Tenants 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 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 State provisions. Except in the case of Last Resort Housing situations, the potential payment to the household will be payable over a 42-month period and limited to a maximum of \$5,250 as stated under the 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 6** below illustrates the computation of a rental/down payment assistance payment amount.

**Table 6: 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.

#### **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 \$5,250 in total 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 a 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 (\$5,250); hence, satisfying the requirement that "comparable replacement housing" is available.

The City will pay Last Resort Housing payments in two installments: The first installment includes the first and last month's rent and security deposit of the replacement property and is paid at time the deposit is required. The last installment includes the remaining balance of the eligible relocation payments and is paid at move out date. 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 Notice of Eligibility (NOE) issued to residential displacees. For residential tenants, 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.

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 under the Federal relocation law, 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, 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 a public hearing for the Project on November 19, 2024. 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 December 2024 and would be completed no later than the 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:	\$ 225,000
Contingency at 20%:	<u>\$ 45,000</u>
<b>Total:</b>	<b>\$ 270,000</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 may 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 Costa Mesa - Shalimar Park Expansion	
<b>Case ID:</b>	
<b>Site Address:</b> 778 Shalimar Drive, Unit	<b>Total occupants:</b>
<b>City, St, ZIP:</b> Costa Mesa, CA 92627	<b>Interview Date:</b>
	<input type="checkbox"/> Unoccupied
	<b>Interviewer:</b>
	<input type="checkbox"/> No Contact
<b>INDIVIDUAL OCCUPANTS (use additional pages as needed)</b>	
<b>1. Name:</b>	
<b>Gender:</b> F M	
<b>Employer/School:</b>	
<b>Relationship (list 1):</b> HEAD OF HOUSEHOLD	<input type="checkbox"/> ID verified
<b>Income srce (list 2):</b>	<b>Income/empl. description:</b>
<b>Hire/start date:</b>	<b>Mo Income:</b>
<b>Lawful presence (list 3):</b>	<b>Date of birth:</b>
<b>Phone/fax/email:</b>	<b>Move-in date:</b>
<b>Notes/special needs:</b>	
<b>2. Name:</b>	
<b>Gender:</b> F M	
<b>Employer/School:</b>	
<b>Relationship (list 1):</b>	<input type="checkbox"/> ID verified
<b>Income srce (list 2):</b>	<b>Income/empl. description:</b>
<b>Hire/start date:</b>	<b>Mo Income:</b>
<b>Lawful presence (list 3):</b>	<b>Date of birth:</b>
<b>Phone/fax/email:</b>	<b>Move-in date:</b>
<b>Notes/special needs:</b>	
<b>3. Name:</b>	
<b>Gender:</b> F M	
<b>Employer/School:</b>	
<b>Relationship (list 1):</b>	<input type="checkbox"/> ID verified
<b>Income srce (list 2):</b>	<b>Income/empl. description:</b>
<b>Hire/start date:</b>	<b>Mo Income:</b>
<b>Lawful presence (list 3):</b>	<b>Date of birth:</b>
<b>Phone/fax/email:</b>	<b>Move-in date:</b>
<b>Notes/special needs:</b>	
<b>4. Name:</b>	
<b>Gender:</b> F M	
<b>Employer/School:</b>	
<b>Relationship (list 1):</b>	<input type="checkbox"/> ID verified
<b>Income srce (list 2):</b>	<b>Income/empl. description:</b>
<b>Hire/start date:</b>	<b>Mo Income:</b>
<b>Lawful presence (list 3):</b>	<b>Date of birth:</b>
<b>Phone/fax/email:</b>	<b>Move-in date:</b>
<b>Notes/special needs:</b>	
<b>5. Name:</b>	
<b>Gender:</b> F M	
<b>Employer/School:</b>	
<b>Relationship (list 1):</b>	<input type="checkbox"/> ID verified
<b>Income srce (list 2):</b>	<b>Income/empl. description:</b>
<b>Hire/start date:</b>	<b>Mo Income:</b>
<b>Lawful presence (list 3):</b>	<b>Date of birth:</b>
<b>Phone/fax/email:</b>	<b>Move-in date:</b>
<b>Notes/special needs:</b>	
<b>6. Name:</b>	
<b>Gender:</b> F M	
<b>Employer/School:</b>	
<b>Relationship (list 1):</b>	<input type="checkbox"/> ID verified
<b>Income srce (list 2):</b>	<b>Income/empl. description:</b>
<b>Hire/start date:</b>	<b>Mo Income:</b>
<b>Lawful presence (list 3):</b>	<b>Date of birth:</b>
<b>Phone/fax/email:</b>	<b>Move-in date:</b>
<b>Notes/special needs:</b>	

DWELLING			HOUSEHOLD		
Mailing Address:			<input type="checkbox"/> Primary residence of all occupants? (If not, explain in notes)		
City, St, ZIP:			<input type="checkbox"/> Can someone read/understand English? If not, language:		
Carbon Copy Address:			Race/Ethnicity: <input type="checkbox"/> American Indian/Alaskan <input type="checkbox"/> Asian		
City, St, ZIP:			<input type="checkbox"/> Black/African-American <input type="checkbox"/> Hawaiian/Pacific Islander		
Dwelling Type (list 4):			<input type="checkbox"/> Hispanic/Latino <input type="checkbox"/> White <input type="checkbox"/> Other <input type="checkbox"/> Mixed		
Bedrooms:	Attic/Utility/Storage:	Approx Sq Ft:	Subscribe to: <input type="checkbox"/> Land phone <input type="checkbox"/> TV service <input type="checkbox"/> Internet		
Kitchen:	Basement:	Bathrooms:	<input type="checkbox"/> Home-based business? (describe in notes)		
Living/family rooms:	Garage:	Garage Spaces:	<input type="checkbox"/> Rent rooms in dwelling? (describe in notes)		
Dining room:	Other/Extra:	Carport Spaces:	<input type="checkbox"/> On fixed income or public assistance? (describe in Occupants)		
Den/Office:	Total physical and content rooms to move:	Parking Spaces:	<input type="checkbox"/> Disabled occupants? (describe modifications/needs in Occupants)		
Total Rooms:		Number of cars:	Replacement site <u>special</u> needs (mark and describe in Notes)		
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			<input type="checkbox"/> Employment access <input type="checkbox"/> Shopping		
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			<input type="checkbox"/> Public transport <input type="checkbox"/> Religious		
Dwelling Condition: <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor			<input type="checkbox"/> Medical facilities/services <input type="checkbox"/> Social/Public services		
Neighborhood Condition: <input type="checkbox"/> Good <input type="checkbox"/> Fair <input type="checkbox"/> Poor			<input type="checkbox"/> School needs <input type="checkbox"/> Relatives/Ethnic		
Amenities:			<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)		
TENANT			Replacement dwelling preference: <input type="checkbox"/> Rent <input type="checkbox"/> Buy		
Rent terms: <input type="checkbox"/> Month-Month <input type="checkbox"/> Lease, months left:			Can relocate from: <input type="checkbox"/> Neighborhood <input type="checkbox"/> City <input type="checkbox"/> County <input type="checkbox"/> State		
<input type="checkbox"/> Rent reduced in exchange for service		<input type="checkbox"/> Unit furnished by tenant	Preferred relocation areas:		
Monthly contract rent: \$		Security deposit: \$	HOMEOWNER		
Landlord/manager name/ph:		Lot size (sq ft):	Date purchased:	Age (yrs):	
<input type="checkbox"/> Written rental agreement available?		<input type="checkbox"/> Rent receipts available?	<input type="checkbox"/> Own clear, no mortg/loans		<input type="checkbox"/> Negative equity
<input type="checkbox"/> Receiving Section 8 or other housing assistance?		1st Loan Information		2nd Loan Information	
Caseworker name/ph:		Lender:		Lender:	
Monthly tenant portion of rent: \$		Loan Type (list 5):		Loan Type (list 5):	
Annual family/child care expenses to allow work: \$		Current % Rate:		Current % Rate:	
Annual non-reimbursed medical expenses: \$		Principal Balance: \$		Principal Balance: \$	
Annual non-reimb. handicapped assistance expenses: \$		Original Date:		Original Date:	
Utilities paid by tenant:		Remaining months:		Remaining months:	
<input type="checkbox"/> Gas: \$ <input type="checkbox"/> Electric: \$ <input type="checkbox"/> Water: \$ <input type="checkbox"/> Sewer: \$ <input type="checkbox"/> Trash: \$ <input type="checkbox"/> NONE		Pets:  Energy source: Gas Electr Oil Other Cooking Stove: <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Water Heater: <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Space Heat: <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Air Conditioning: <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		Monthly P&I payment: Monthly P&I payment:	
MOBILE HOME					
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 #:			



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**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**

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Sacramento, CA 95833  
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[www.hcd.ca.gov](http://www.hcd.ca.gov)



May 9, 2024

**MEMORANDUM FOR:** Interested Parties

**FROM:** Megan Kirkeby, Deputy Director  
Division of Housing Policy Development

**SUBJECT:** **2024 State Income Limits**

Attached are briefing materials and 2024 State Income Limits that are now in effect, replacing the previous 2023 State Income Limits. Income limits 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 2024 State Income Limits are on the Department of Housing and Community Development (HCD) website at <https://www.hcd.ca.gov/grants-and-funding/income-limits/state-and-federal-income-rent-and-loan-value-limits>.

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 2024 State 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, 2024, 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](#).

For questions concerning State Income Limits, please see the Questions and Answers on page 5 or contact [StateIncomeLimits@hcd.ca.gov](mailto:StateIncomeLimits@hcd.ca.gov).

## 2024 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 most recently released on April 1, 2024.

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, increases a county's area median income to equal California's non-metropolitan median income, (2) adjusts Area Median Income (AMI) and household income category levels to not result in any year-over-year 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 ensure income limits and area median income levels do not fall below a prior year's highest level), and (3) determines income limits for California's acutely low-income and moderate-income categories.

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/il24/IncomeLimitsMethodology-FY24.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 2024 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 Federal 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 the extremely low- and low-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. However, 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



### **2024 State Income Limits Briefing Materials California Code of Regulations, Title 25, Section 6932**

produce unintended anomalies inconsistent with statutory intent (e.g., very low-income limits being 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 AMI that, pursuant to Health & Safety Code section 50093(c), means the MFI of a geographic area of the State, as estimated annually by HUD for its Section 8 Program.

In estimating FY 2024 median family incomes, HUD uses median family income data (as opposed to median household income data) from the 2022 American Community Survey (ACS) as calculated by the Census Bureau. The Census Bureau produces two types of ACS estimates: the "one-year" data, which represent estimates as of 2022; and the "five-year" data, which represent estimates as of 2018-2022 (but are inflated to 2022 dollars). HUD requires special tabulations of the ACS to match its custom HMFA definitions described above.

HUD uses the 2022 ACS median family income data (as opposed to household income data) as the basis of FY 2024 Income Limits for all areas of California. HUD uses an inflation forecast from the Congressional Budget Office (CBO) in updating ACS estimates. For FY 2024, CBO has produced a forecast CPI of 310.683, which divided by annual 2022 of 292.613 is 1.062 (an increase of 6.2 percent).

For additional information on MFI's please see HUD's briefing materials at <https://www.huduser.gov/portal/datasets/il/il24/Medians-Methodology-FY24.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 as measured by the ACS with an absolute cap of 10 percent, whichever is greater. For 2024, the annualized change is measured by the ACS from 2021 to 2022. Twice this change is approximately 14.8 percent, which is greater than the 10 percent absolute cap. So, for FY 2024, the income limits "cap" is 10 percent. HUD first announced this methodology on January 10, 2024 in a Federal Register Notice. The cap and floor rules do 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:	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>
Adjustments:	70%	80%	90%	Base	108%	116%	124%	132%

## **2024 State Income Limits Briefing Materials**

### **California Code of Regulations, Title 25, Section 6932**

#### ***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 2024 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 household has more than eight members. New for FY 2024, family size-adjusted income limits are retested for compliance with the cap and floor rules. Please refer to HUD's briefing material for additional information on family size adjustments.

#### **HCD Methodology**

State law (see, e.g., Health & Safety Code section 50093) 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 AMI levels and household income category levels, (3) applying to the median income the same family size adjustments HUD applies to the income limits, (4) determining income limit levels applicable to California's acutely low-income households defined by law as household income not exceeding 15 percent of county AMI, and (5) determining income limit levels applicable to California's moderate-income households defined by law as household income not exceeding 120 percent of county AMI.

#### ***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 (\$87,900 for 2024). Next, HCD applies its HH Policy to ensure AMI 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***

Beginning in 2022, Health and Safety Code section 50063.5 established California's acutely low-income household 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 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>.



## **2024 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 AMI (or the low-income limit not equal 80% of 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, as well as several others, the magnitude of these adjustments results in the low-income limit exceeding AMI.** These exceptions are detailed in the FY 2024 Income Limits Methodology Document, <https://www.huduser.gov/portal/datasets/il/il24/Medians-Methodology-FY24.pdf>.

For further information on the exact adjustments made to an individual area of the country, please see HUD's FY 2024 Income Limits Documentation System. The documentation system is available at [https://www.huduser.gov/portal/datasets/il/il2024/select\\_Geography.odn](https://www.huduser.gov/portal/datasets/il/il2024/select_Geography.odn). 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 2024 Income Limits are calculated using 2018-2022 5-year American Community Survey (ACS) data, and one-year 2022 data where possible. This is a two-year lag, so more current trends in median family income levels are not available.

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 ACS, table B19113 - MEDIAN FAMILY INCOME IN THE PAST 12 MONTHS. A Consumer Price Index (CPI) forecast as published by the Bureau of Labor Statistics is used in the trend factor calculation to bring the 2021 ACS data forward to FY 2023.

For additional details concerning the use of the ACS in HUD's calculations of MFI, please see HUD's FY 2024 Median Family Income methodology document, at <https://www.huduser.gov/portal/datasets/il/il23/Medians-Methodology-FY24.pdf>

Additionally, full documentation of all calculations for MFIs is available in the FY 2024 Median Family Income and the FY 2024 Income Limits Documentation System. These systems are available at [https://www.huduser.gov/portal/datasets/il/il2024/select\\_Geography.odn](https://www.huduser.gov/portal/datasets/il/il2024/select_Geography.odn)

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

HCD's 2013 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 AMI to at least equal the state non-metropolitan county median income, as published by HUD. Further, HCD's 2013 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. 2024 Income Limits**

<b>Number of Persons in Household:</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>
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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: \$155,700	Acutely Low	16350	18700	21000	23350	25200	27100	28950	30800
	Extremely Low	32700	37400	42050	46700	50450	54200	57950	61650
	Very Low Income	54500	62300	70100	77850	84100	90350	96550	102800
	Low Income	84600	96650	108750	120800	130500	140150	149800	159500
	<b>Median Income</b>	109000	124550	140150	<b>155700</b>	168150	180600	193050	205500
	Moderate Income	130800	149500	168150	186850	201800	216750	231700	246650

Alpine County Area Median Income: \$119,300	Acutely Low	12550	14300	16100	17900	19350	20750	22200	23650
	Extremely Low	22200	25400	28550	31700	36580	41960	47340	52720
	Very Low Income	37000	42250	47550	52850	57050	61300	65550	69750
	Low Income	59200	67650	76100	84550	91350	98100	104850	111650
	<b>Median Income</b>	83500	95450	107350	<b>119300</b>	128850	138400	147950	157500
	Moderate Income	100200	114500	128850	143150	154600	166050	177500	188950

Amador County Area Median Income: \$101,900	Acutely Low	10700	12250	13750	15300	16500	17750	18950	20200
	Extremely Low	21200	24200	27250	31200	36580	41960	47340	52720
	Very Low Income	35300	40350	45400	50400	54450	58500	62500	66550
	Low Income	56450	64550	72600	80650	87150	93600	100050	106500
	<b>Median Income</b>	71350	81500	91700	<b>101900</b>	110050	118200	126350	134500
	Moderate Income	85600	97850	110050	122300	132100	141850	151650	161450

Butte County Area Median Income: \$96,600	Acutely Low	10150	11600	13050	14500	15650	16800	18000	19150
	Extremely Low	19050	21800	25820	31200	36580	41960	47340	52720
	Very Low Income	31750	36300	40850	45350	49000	52600	56250	59850
	Low Income	50750	58000	65250	72500	78300	84100	89900	95700
	<b>Median Income</b>	67600	77300	86950	<b>96600</b>	104350	112050	119800	127500
	Moderate Income	81150	92700	104300	115900	125150	134450	143700	153000

Calaveras County Area Median Income: \$96,200	Acutely Low	10100	11550	13000	14450	15600	16750	17900	19050
	Extremely Low	20050	22900	25820	31200	36580	41960	47340	52720
	Very Low Income	33400	38150	42900	47650	51500	55300	59100	62900
	Low Income	53400	61000	68650	76250	82350	88450	94550	100650
	<b>Median Income</b>	67350	76950	86600	<b>96200</b>	103900	111600	119300	127000
	Moderate Income	80800	92350	103900	115450	124700	133900	143150	152400

Colusa County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250

Contra Costa County Area Median Income: \$155,700	Acutely Low	16350	18700	21000	23350	25200	27100	28950	30800
	Extremely Low	32700	37400	42050	46700	50450	54200	57950	61650
	Very Low Income	54500	62300	70100	77850	84100	90350	96550	102800
	Low Income	84600	96650	108750	120800	130500	140150	149800	159500
	<b>Median Income</b>	109000	124550	140150	<b>155700</b>	168150	180600	193050	205500
	Moderate Income	130800	149500	168150	186850	201800	216750	231700	246650



Number of Persons in Household:		1	2	3	4	5	6	7	8
Del Norte County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
El Dorado County Area Median Income: \$113,900	Acutely Low	11950	13700	15400	17100	18450	19850	21200	22550
	Extremely Low	24750	28300	31850	35350	38200	41960	47340	52720
	Very Low Income	41300	47150	53050	58950	63650	68400	73100	77850
	Low Income	66050	75450	84900	94300	101850	109400	116950	124500
	<b>Median Income</b>	79750	91100	102500	<b>113900</b>	123000	132100	141250	150350
	Moderate Income	95700	109350	123050	136700	147650	158550	169500	180450
Fresno County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Glenn County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Humboldt County Area Median Income: \$88,300	Acutely Low	9300	10600	11950	13250	14300	15350	16450	17500
	Extremely Low	18550	21200	25820	31200	36580	41960	47340	52720
	Very Low Income	30950	35350	39750	44150	47700	51250	54750	58300
	Low Income	49500	56550	63600	70650	76350	82000	87650	93300
	<b>Median Income</b>	61800	70650	79450	<b>88300</b>	95350	102450	109500	116550
	Moderate Income	74150	84750	95350	105950	114450	122900	131400	139850
Imperial County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Inyo County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250

Number of Persons in Household:		1	2	3	4	5	6	7	8
Kern County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Kings County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Lake County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Lassen County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Los Angeles County Area Median Income: \$98,200	Acutely Low	10350	11800	13300	14750	15950	17100	18300	19450
	Extremely Low	29150	33300	37450	41600	44950	48300	51600	54950
	Very Low Income	48550	55450	62400	69350	74900	80450	86000	91550
	Low Income	77700	88800	99900	110950	119850	128750	137600	146500
	<b>Median Income</b>	68750	78550	88400	<b>98200</b>	106050	113900	121750	129600
	Moderate Income	82500	94300	106050	117850	127300	136700	146150	155550
Madera County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Marin County Area Median Income: \$186,600	Acutely Low	19600	22400	25200	28000	30250	32500	34700	36950
	Extremely Low	41150	47000	52900	58750	63450	68150	72850	77550
	Very Low Income	68550	78350	88150	97900	105750	113600	121400	129250
	Low Income	109700	125350	141000	156650	169200	181750	194250	206800
	<b>Median Income</b>	130600	149300	167950	<b>186600</b>	201550	216450	231400	246300
	Moderate Income	156750	179100	201500	223900	241800	259700	277650	295550



Number of Persons in Household:		1	2	3	4	5	6	7	8
Mariposa County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Mendocino County Area Median Income: \$90,400	Acutely Low	9500	10850	12200	13550	14650	15700	16800	17900
	Extremely Low	19000	21700	25820	31200	36580	41960	47340	52720
	Very Low Income	31650	36200	40700	45200	48850	52450	56050	59700
	Low Income	50650	57850	65100	72300	78100	83900	89700	95450
	<b>Median Income</b>	63300	72300	81350	<b>90400</b>	97650	104850	112100	119350
	Moderate Income	75950	86800	97650	108500	117200	125850	134550	143200
Merced County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Modoc County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Mono County Area Median Income: \$105,900	Acutely Low	11150	12700	14300	15900	17150	18450	19700	21000
	Extremely Low	19650	22450	25820	31200	36580	41960	47340	52720
	Very Low Income	32700	37400	42050	46750	50450	54200	57950	61700
	Low Income	52350	59800	67300	74800	80750	86750	92750	98750
	<b>Median Income</b>	74150	84700	95300	<b>105900</b>	114350	122850	131300	139800
	Moderate Income	88950	101700	114400	127100	137250	147450	157600	167750
Monterey County Area Median Income: \$103,200	Acutely Low	10850	12400	13950	15500	16750	18000	19200	20450
	Extremely Low	27800	31800	35750	39700	42900	46100	49250	52720
	Very Low Income	46350	53000	59600	66200	71500	76800	82100	87400
	Low Income	74150	84800	95400	105950	114450	122950	131400	139900
	<b>Median Income</b>	72250	82550	92900	<b>103200</b>	111450	119700	127950	136200
	Moderate Income	86700	99100	111450	123850	133750	143650	153550	163500
Napa County Area Median Income: \$129,600	Acutely Low	13600	15550	17500	19450	21000	22550	24100	25650
	Extremely Low	30850	35250	39650	44050	47600	51100	54650	58150
	Very Low Income	51400	58700	66100	73400	79300	85150	91050	96900
	Low Income	82150	93900	105650	117350	126750	136150	145550	154900
	<b>Median Income</b>	90700	103700	116650	<b>129600</b>	139950	150350	160700	171050
	Moderate Income	108850	124400	139950	155500	167950	180400	192800	205250

Number of Persons in Household:		1	2	3	4	5	6	7	8
Nevada County Area Median Income: \$112,500	Acutely Low	11850	13500	15200	16900	18250	19600	20950	22300
	Extremely Low	21900	25000	28150	31250	36580	41960	47340	52720
	Very Low Income	36500	41700	46900	52100	56300	60450	64650	68800
	Low Income	58350	66700	75050	83350	90050	96700	103400	110050
	<b>Median Income</b>	78750	90000	101250	<b>112500</b>	121500	130500	139500	148500
	Moderate Income	94500	108000	121500	135000	145800	156600	167400	178200
Orange County Area Median Income: \$129,000	Acutely Low	13550	15500	17400	19350	20900	22450	24000	25550
	Extremely Low	33150	37900	42650	47350	51150	54950	58750	62550
	Very Low Income	55250	63100	71050	78900	85250	91550	97850	104150
	Low Income	88400	101000	113650	126250	136350	146450	156550	166650
	<b>Median Income</b>	90300	103200	116100	<b>129000</b>	139300	149650	159950	170300
	Moderate Income	108350	123850	139300	154800	167200	179550	191950	204350
Placer County Area Median Income: \$113,900	Acutely Low	11950	13700	15400	17100	18450	19850	21200	22550
	Extremely Low	24750	28300	31850	35350	38200	41960	47340	52720
	Very Low Income	41300	47150	53050	58950	63650	68400	73100	77850
	Low Income	66050	75450	84900	94300	101850	109400	116950	124500
	<b>Median Income</b>	79750	91100	102500	<b>113900</b>	123000	132100	141250	150350
	Moderate Income	95700	109350	123050	136700	147650	158550	169500	180450
Plumas County Area Median Income: \$92,400	Acutely Low	9700	11100	12450	13850	14950	16050	17150	18300
	Extremely Low	19400	22150	25820	31200	36580	41960	47340	52720
	Very Low Income	32250	36850	41450	46050	49750	53450	57150	60800
	Low Income	51600	59000	66350	73700	79600	85500	91400	97300
	<b>Median Income</b>	64700	73900	83150	<b>92400</b>	99800	107200	114600	121950
	Moderate Income	77650	88700	99800	110900	119750	128650	137500	146400
Riverside County Area Median Income: \$97,500	Acutely Low	10250	11700	13200	14650	15800	17000	18150	19350
	Extremely Low	21550	24600	27700	31200	36580	41960	47340	52720
	Very Low Income	35900	41000	46100	51250	55350	59450	63550	67650
	Low Income	57400	65600	73800	82000	88600	95150	101650	108250
	<b>Median Income</b>	68250	78000	87750	<b>97500</b>	105300	113100	120900	128700
	Moderate Income	81900	93600	105300	117000	126350	135700	145100	154450
Sacramento County Area Median Income: \$113,900	Acutely Low	11950	13700	15400	17100	18450	19850	21200	22550
	Extremely Low	24750	28300	31850	35350	38200	41960	47340	52720
	Very Low Income	41300	47150	53050	58950	63650	68400	73100	77850
	Low Income	66050	75450	84900	94300	101850	109400	116950	124500
	<b>Median Income</b>	79750	91100	102500	<b>113900</b>	123000	132100	141250	150350
	Moderate Income	95700	109350	123050	136700	147650	158550	169500	180450
San Benito County Area Median Income: \$140,200	Acutely Low	14750	16850	18950	21050	22750	24400	26100	27800
	Extremely Low	25700	29400	33050	36700	39650	42600	47340	52720
	Very Low Income	42850	49000	55100	61200	66100	71000	75900	80800
	Low Income	68550	78350	88150	97950	105800	113600	121450	129300
	<b>Median Income</b>	98150	112150	126200	<b>140200</b>	151400	162650	173850	185050
	Moderate Income	117750	134600	151450	168250	181700	195150	208650	222100



Number of Persons in Household:		1	2	3	4	5	6	7	8
San Bernardino County Area Median Income: \$97,500	Acutely Low	10250	11700	13200	14650	15800	17000	18150	19350
	Extremely Low	21550	24600	27700	31200	36580	41960	47340	52720
	Very Low Income	35900	41000	46100	51250	55350	59450	63550	67650
	Low Income	57400	65600	73800	82000	88600	95150	101650	108250
	<b>Median Income</b>	68250	78000	87750	<b>97500</b>	105300	113100	120900	128700
	Moderate Income	81900	93600	105300	117000	126350	135700	145100	154450
San Diego County Area Median Income: \$119,500	Acutely Low	12550	14350	16150	17950	19400	20800	22250	23700
	Extremely Low	31850	36400	40950	45450	49100	52750	56400	60000
	Very Low Income	53050	60600	68200	75750	81850	87900	93950	100000
	Low Income	84900	97000	109150	121250	130950	140650	150350	160050
	<b>Median Income</b>	83650	95600	107550	<b>119500</b>	129050	138600	148200	157750
	Moderate Income	100400	114700	129050	143400	154850	166350	177800	189300
San Francisco County Area Median Income: \$186,600	Acutely Low	19600	22400	25200	28000	30250	32500	34700	36950
	Extremely Low	41150	47000	52900	58750	63450	68150	72850	77550
	Very Low Income	68550	78350	88150	97900	105750	113600	121400	129250
	Low Income	109700	125350	141000	156650	169200	181750	194250	206800
	<b>Median Income</b>	130600	149300	167950	<b>186600</b>	201550	216450	231400	246300
	Moderate Income	156750	179100	201500	223900	241800	259700	277650	295550
San Joaquin County Area Median Income: \$103,800	Acutely Low	10900	12450	14000	15550	16800	18050	19300	20550
	Extremely Low	20250	23150	26050	31200	36580	41960	47340	52720
	Very Low Income	33750	38600	43400	48200	52100	55950	59800	63650
	Low Income	54000	61700	69400	77100	83300	89450	95600	101800
	<b>Median Income</b>	72650	83050	93400	<b>103800</b>	112100	120400	128700	137000
	Moderate Income	87200	99650	112100	124550	134500	144500	154450	164400
San Luis Obispo County Area Median Income: \$125,600	Acutely Low	13200	15100	16950	18850	20350	21850	23350	24900
	Extremely Low	26750	30600	34400	38200	41300	44350	47400	50450
	Very Low Income	44600	50950	57300	63650	68750	73850	78950	84050
	Low Income	71350	81550	91700	101900	110100	118250	126350	134500
	<b>Median Income</b>	87900	100500	113050	<b>125600</b>	135650	145700	155750	165800
	Moderate Income	105500	120550	135650	150700	162750	174800	186850	198900
San Mateo County Area Median Income: \$186,600	Acutely Low	19600	22400	25200	28000	30250	32500	34700	36950
	Extremely Low	41150	47000	52900	58750	63450	68150	72850	77550
	Very Low Income	68550	78350	88150	97900	105750	113600	121400	129250
	Low Income	109700	125350	141000	156650	169200	181750	194250	206800
	<b>Median Income</b>	130600	149300	167950	<b>186600</b>	201550	216450	231400	246300
	Moderate Income	156750	179100	201500	223900	241800	259700	277650	295550
Santa Barbara County Area Median Income: \$119,100	Acutely Low	12500	14300	16050	17850	19300	20700	22150	23550
	Extremely Low	34200	39050	43950	48800	52750	56650	60550	64450
	Very Low Income	56950	65050	73200	81300	87850	94350	100850	107350
	Low Income	91200	104250	117300	130350	140800	151250	161600	172050
	<b>Median Income</b>	83350	95300	107200	<b>119100</b>	128650	138150	147700	157200
	Moderate Income	100050	114300	128600	142900	154350	165750	177200	188650

Number of Persons in Household:		1	2	3	4	5	6	7	8
Santa Clara County Area Median Income: \$184,300	Acutely Low	19350	22100	24900	27650	29850	32050	34300	36500
	Extremely Low	38750	44250	49800	55300	59750	64150	68600	73000
	Very Low Income	64550	73750	82950	92150	99550	106900	114300	121650
	Low Income	102300	116900	131500	146100	157800	169500	181200	192900
	<b>Median Income</b>	129000	147450	165850	<b>184300</b>	199050	213800	228550	243300
	Moderate Income	154800	176900	199050	221150	238850	256550	274250	291900
Santa Cruz County Area Median Income: \$132,800	Acutely Low	13950	15900	17900	19900	21500	23100	24700	26250
	Extremely Low	38050	43500	48950	54350	58700	63050	67400	71750
	Very Low Income	63400	72450	81500	90550	97800	105050	112300	119550
	Low Income	101750	116250	130750	145300	156950	168550	180200	191800
	<b>Median Income</b>	92950	106250	119500	<b>132800</b>	143400	154050	164650	175300
	Moderate Income	111550	127500	143400	159350	172100	184850	197600	210350
Shasta County Area Median Income: \$89,800	Acutely Low	9400	10750	12100	13450	14550	15600	16700	17750
	Extremely Low	18750	21400	25820	31200	36580	41960	47340	52720
	Very Low Income	31200	35650	40100	44550	48150	51700	55250	58850
	Low Income	49950	57050	64200	71300	77050	82750	88450	94150
	<b>Median Income</b>	62850	71850	80800	<b>89800</b>	97000	104150	111350	118550
	Moderate Income	75450	86200	97000	107750	116350	125000	133600	142250
Sierra County Area Median Income: \$90,000	Acutely Low	9450	10800	12150	13500	14600	15650	16750	17800
	Extremely Low	18900	21600	25820	31200	36580	41960	47340	52720
	Very Low Income	31500	36000	40500	45000	48600	52200	55800	59400
	Low Income	50400	57600	64800	72000	77800	83550	89300	95050
	<b>Median Income</b>	63000	72000	81000	<b>90000</b>	97200	104400	111600	118800
	Moderate Income	75600	86400	97200	108000	116650	125300	133900	142550
Siskiyou County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Solano County Area Median Income: \$113,200	Acutely Low	11900	13600	15300	17000	18350	19700	21100	22450
	Extremely Low	26450	30200	34000	37750	40800	43800	47340	52720
	Very Low Income	44050	50350	56650	62900	67950	73000	78000	83050
	Low Income	70450	80500	90550	100650	108700	116750	124850	132850
	<b>Median Income</b>	79250	90550	101900	<b>113200</b>	122250	131300	140350	149400
	Moderate Income	95100	108700	122250	135850	146700	157600	168450	179300
Sonoma County Area Median Income: \$128,400	Acutely Low	13500	15400	17350	19250	20800	22350	23850	25400
	Extremely Low	29050	33200	37350	41500	44850	48150	51500	54800
	Very Low Income	48450	55350	62250	69150	74700	80250	85750	91300
	Low Income	77500	88600	99650	110700	119600	128450	137300	146150
	<b>Median Income</b>	89900	102700	115550	<b>128400</b>	138650	148950	159200	169500
	Moderate Income	107850	123300	138700	154100	166450	178750	191100	203400



Number of Persons in Household:		1	2	3	4	5	6	7	8
Stanislaus County Area Median Income: \$92,600	Acutely Low	9750	11100	12500	13900	15000	16100	17250	18350
	Extremely Low	19150	21900	25820	31200	36580	41960	47340	52720
	Very Low Income	31900	36450	41000	45550	49200	52850	56500	60150
	Low Income	51050	58350	65650	72900	78750	84600	90400	96250
	<b>Median Income</b>	64800	74100	83350	<b>92600</b>	100000	107400	114800	122250
	Moderate Income	77750	88900	100000	111100	120000	128900	137750	146650
Sutter County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Tehama County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Trinity County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Tulare County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250
Tuolumne County Area Median Income: \$97,700	Acutely Low	10250	11700	13200	14650	15800	17000	18150	19350
	Extremely Low	20350	23250	26150	31200	36580	41960	47340	52720
	Very Low Income	33900	38750	43600	48450	52350	56200	60100	63950
	Low Income	54250	62000	69750	77450	83650	89850	96050	102250
	<b>Median Income</b>	68400	78150	87950	<b>97700</b>	105500	113350	121150	128950
	Moderate Income	82100	93800	105550	117250	126650	136000	145400	154750
Ventura County Area Median Income: \$125,600	Acutely Low	13200	15100	16950	18850	20350	21850	23350	24900
	Extremely Low	29550	33800	38000	42200	45600	49000	52350	55750
	Very Low Income	49250	56300	63350	70350	76000	81650	87250	92900
	Low Income	78800	90050	101300	112550	121600	130600	139600	148600
	<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
Yolo County Area Median Income: \$117,000	Acutely Low	12300	14050	15800	17550	18950	20350	21750	23150
	Extremely Low	24250	27700	31150	34600	37400	41960	47340	52720
	Very Low Income	40400	46150	51900	57650	62300	66900	71500	76100
	Low Income	64600	73800	83050	92250	99650	107050	114400	121800
	<b>Median Income</b>	81900	93600	105300	<b>117000</b>	126350	135700	145100	154450
	Moderate Income	98300	112300	126350	140400	151650	162850	174100	185350
Yuba County Area Median Income: \$87,900	Acutely Low	9250	10550	11900	13200	14250	15300	16350	17400
	Extremely Low	18450	21100	25820	31200	36580	41960	47340	52720
	Very Low Income	30800	35200	39600	43950	47500	51000	54500	58050
	Low Income	49250	56250	63300	70300	75950	81550	87200	92800
	<b>Median Income</b>	61550	70300	79100	<b>87900</b>	94950	101950	109000	116050
	Moderate Income	73850	84400	94950	105500	113950	122400	130800	139250

**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 persons	=9 persons
Acutely Low Income	13,200	1056	17,400	18,450
Extremely Low Income	31,200	2496	52,720	55,200
Very Low Income	43,950	3516	58,050	61,550
Lower Income	70,300	5624	92,800	98,400
Moderate Income	105,500	8440	139,250	147,700

Ten Person Calculation - Example County

4 persons	8 person +	8% Adj x 2	=10 persons
13,200	17,400	2112	19,500
31,200	52,720	4992	57,700
43,950	58,050	7032	65,100
70,300	92,800	11248	104,050
105,500	139,250	16880	156,150

**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: 4/1/2024**

HUD FY 2024 California median incomes:

State median income: \$111,300

Metropolitan county median income: \$111,900

Non-metropolitan county median income: \$87,900

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

### Rental Listings

#### 6 SFRs Available for Rent within 5 Miles of the Subject Property

Address	City	Bedrooms	Listing Price	Median Price
2222 Canyon Dr,	Costa Mesa, CA 92627	2	\$3,500	<b>\$3,450</b>
680 W 18th St	Costa Mesa, CA 92627	2	\$3,000	
555 Victoria St	Costa Mesa, CA 92627	2	\$3,350	
2017 Orange Ave	Costa Mesa, CA 92627	2	\$6,500	
138 Walnut St,	Costa Mesa, CA 92627	2	\$5,300	
2089 Tustin Ave #2091	Costa Mesa, CA 92627	2	\$3,400	

#### 3 Condos Available for Rent within 5 Miles of the Subject Property

Address	City	Bedrooms	Listing Price	Median Price
678 Joann St APT A,	Costa Mesa, CA 92627	2	\$3,650	<b>\$3,650</b>
144 Yorktown Ln	Costa Mesa, CA 92627	2	\$3,580	
1644 Pomona Ave	Costa Mesa, CA 92627	2	\$4,900	

**45 Apartments Available for Rent Within 5 miles from the Subject Property**

Address	City	Bedrooms	Listing Price	Median Price
2345 Newport Blvd	Costa Mesa, CA 92627	2	2,895.00	\$2,903
169 Walnut St. #B	Costa Mesa, CA 92627	2	3,550.00	
274 Camellia Ln	Costa Mesa, CA 92627	2	3,700.00	
132 Cecil Pl	Costa Mesa, CA 92627	2	3,250.00	
2312 Santa Ana Ave	Costa Mesa, CA 92627	2	3,300.00	
555 Paularino Ave	Costa Mesa, CA 92626	2	3,159.00	
550 Paularino Ave,	Costa Mesa, CA 92626	2	2,925.00	
125 E Baker St	Costa Mesa, CA 92626	2	3,349.00	
931 W 19th St	Costa Mesa, CA 92626	2	2,495.00	
735 Joann St	Costa Mesa, CA 92627	2	2,700.00	
845 Paularino Ave	Costa Mesa, CA 92627	2	2,900.00	
1765 Santa Ana Ave	Costa Mesa, CA 92627	2	2,975.00	
801 Paularino Ave	Costa Mesa, CA 92626	2	2,750.00	
655 Baker St	Costa Mesa, CA 92626	2	2,990.00	
621 W Wilson St	Costa Mesa, CA 92626	2	2,950.00	
2775 Mesa Verde Dr E	Costa Mesa, CA 92626	2	2,905.00	
332 Victoria St	Costa Mesa, CA 92627	2	2,750.00	
1250 Adams Ave,	Costa Mesa, CA 92626	2	2,701.00	
533 W Wilson St., #64	Costa Mesa, CA 92627	2	2,651.00	
2700 Peterson Pl,	Costa Mesa, CA 92626	2	2,700.00	
2952 Peppertree Ln., #D	Costa Mesa, CA 92626	2	2,895.00	
120 Albert Pl., #A102	Costa Mesa, CA 92627	2	2,595.00	
2085 Thurin St., #B202	Costa Mesa, CA 92627	2	2,800.00	
3107 Mace Ave., #C	Costa Mesa, CA 92626	2	2,500.00	
680 Park Dr	Costa Mesa, CA 92627	2	2,850.00	
2666 Orange Ave., #2	Costa Mesa, CA 92627	2	2,650.00	
994 Valencia St., #104	Costa Mesa, CA 92626	2	3,095.00	
818 Jennifer Ln., #2	Costa Mesa, CA 92626	2	2,700.00	
2863 Hickory Pl	Costa Mesa, CA 92626	2	2,795.00	
1575 Coriander Dr	Costa Mesa, CA 92626	2	2,850.00	
200 E 16th St. #A	Costa Mesa, CA 92627	2	3,500.00	
186 Del Mar Ave., #C	Costa Mesa, CA 92627	2	3,190.00	
555 Victoria St., #B	Costa Mesa, CA 92627	2	3,350.00	
2512 Santa Ana Ave., #G	Costa Mesa, CA 92627	2	3,900.00	
1961 Anaheim Ave,	Costa Mesa, CA 92627	2	2,900.00	
840 Center St., #9	Costa Mesa, CA 92627	2	2,300.00	
2330 Vanguard Way	Costa Mesa, CA 92626	2	3,300.00	
1684 Whittier Ave., #6	Costa Mesa, CA 92627	2	2,400.00	
1978 Maple Ave., #U	Costa Mesa, CA 92627	2	2,595.00	
1741 Tustin Ave., #21A	Costa Mesa, CA 92627	2	3,500.00	
2312 Santa Ana Ave., #231	Costa Mesa, CA 92627	2	3,300.00	
1741 Tustin Ave., Apt. 11B	Costa Mesa, CA 92627	2	4,800.00	
1628 Iowa St., #D	Costa Mesa, CA 92626	2	3,750.00	
2696 Santa Ana Ave	Costa Mesa, CA 92627	2	3,895.00	

**Duplex/Triplex/Quadruplex Available for Rent within 5 Miles from the Subject Property**

Address	City	Bedrooms	Listing Price	Median Price
NONE				

41 SFRs Available for Rent within 10 Miles of the Subject Property					
Street #	Street Name	City	Bedrooms	Listing Price	Median Price
12471	Nutwood ST	Garden Grove	4	\$4,085.00	\$5,200
13321	Blackbird ST	Garden Grove	4	\$4,200.00	
6131	Glenwood DR	Huntington Beach	4	\$4,250.00	
949 E	3rd. ST	Santa Ana	4	\$4,300.00	
6	Santa Cruz Aisle	Irvine	4	\$4,300.00	
8111	Marseille DR	Huntington Beach	4	\$4,500.00	
18441	Tamarind ST	Fountain Valley	4	\$4,500.00	
5122	Linda CIR	Huntington Beach	4	\$4,500.00	
2371	Apple Tree DR	Tustin	4	\$4,500.00	
11617	Marigold	Fountain Valley	4	\$4,600.00	
6781	Bridgewater DR	Huntington Beach	4	\$4,600.00	
13836	Platt WAY	Tustin	4	\$4,650.00	
910	Liard PL	Costa Mesa	4	\$4,700.00	
15751	Grey Oaks ST	Westminster	4	\$4,800.00	
4501	Pinyon Tree LN	IR	4	\$4,895.00	
7854	16th ST	Westminster	4	\$4,900.00	
6451	Meadow Crest DR	Huntington Beach	4	\$5,000.00	
6051	Summerdale Dr	Huntington Beach	4	\$5,000.00	
20321	Harpoon CIR	Huntington Beach	4	\$5,200.00	
16129	Evans CIR	Fountain Valley	4	\$5,200.00	
40	Washington	Irvine	4	\$5,200.00	
29	Tiara	Irvine	4	\$5,200.00	
5282	Acorn DR	Huntington Beach	4	\$5,225.00	
8811	Sailport DR	Huntington Beach	4	\$5,250.00	
11725	Espen CIR	Fountain Valley	4	\$5,300.00	
957	Magellan ST	Costa Mesa	4	\$5,300.00	
12	Toscany	Irvine	4	\$5,400.00	
9696	Mariposa AVE	Fountain Valley	4	\$5,450.00	
9202	Aloha DR	Huntington Beach	4	\$5,500.00	
14752	Doncaster RD	Irvine	4	\$5,500.00	
20081	Lawson LN	Huntington Beach	4	\$5,600.00	
9422	Krepp DR	Huntington Beach	4	\$5,600.00	
9021	Hyde Park DR	Huntington Beach	4	\$5,700.00	
17531	Jacaranda	Irvine	4	\$5,800.00	
3495	Windspun DR	Huntington Beach	4	\$5,850.00	
9382	Molokai DR	Huntington Beach	4	\$5,895.00	
8932	Gallant DR	Huntington Beach	4	\$5,900.00	
1789	Bahama PL	Costa Mesa	4	\$5,900.00	
309	Cutter WAY	Costa Mesa	4	\$5,950.00	
6031	Kenwick CIR	Huntington Beach	4	\$6,000.00	
407	Aura DR	Costa Mesa	4	\$6,000.00	

9 Condominiums Available for Rent within 10 Miles of the Subject Property					
Street #	Street Name	City	Bedrooms	Listing Price	Median Price
1001 W	Stevens AVE #250	Santa Ana	4	\$3,495.00	\$5,200
95 W	Yale #3	Irvine	4	\$4,650.00	
56	Fern Pine	Ir	4	\$5,000.00	
5	Shellprint CT	Newport Beach	4	\$5,200.00	
10	Coriander	Irvine	4	\$5,200.00	
39	Rocky Knl #32	Irvine	4	\$5,700.00	
91	Lupari	Irvine	4	\$5,800.00	
41	Lupari	Irvine	4	\$5,800.00	
946	Sunlit LN	Costa Mesa	4	\$5,900.00	
4 Bedroom Apartments Available for Rent within 10 Miles of the Subject Property					
NONE AVAILABLE					
Duplex/Triplex/Quadruplex Available for Rent within 10 Miles from the Subject Property					
Street #	Street Name	City	Bedrooms	Listing Price	Median Price
14251	Olive St	Westminster	4	\$4,500.00	\$4,500

## **Exhibit D**

### **Residential Informational Brochure**

Relocation Assistance  
Informational Statement for  
Families and Individuals

(State)

Displacing Agency:  
**City of Costa Mesa**

Project Name:  
**Shalimar Park Expansion**

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. Eligibility
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.**

This brochure is provided for informational purposes only  
and does not constitute a determination of eligibility for relocation benefits.



**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 Costa Mesa (City). 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. 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 Costa Mesa 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 Costa Mesa'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 Costa Mesa 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.

**Fixed Moving Schedule  
CALIFORNIA (Effective  
2021)**

**Occupant owns furniture:**

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

**Occupant does NOT own  
furniture:**

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 \$5,250.00 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 180 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 180 days** prior to the initiation of negotiation, you may be eligible to receive a payment of up to \$22,500.00 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. To be eligible to receive this payment, the acquired property must have been encumbered by a bona fide mortgage which was a valid lien for at least 180 days prior to the initiation of negotiations. 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 Costa Mesa **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 Costa Mesa. 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 Costa Mesa.

#### **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 Costa Mesa 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. ELIGIBILITY**

Relocation assistance and benefits shall be available to:

- Any person who occupies property from which he will be displaced.
- Any person who moves from real property as a result of its acquisition by a public entity whether the move is voluntary or involuntary.
- Any person who, following the initiation of negotiations by a public entity, moves as the result of the pending acquisition.
- Any person who moves as the result of pending acquisition, rehabilitation or demolition by a public entity either following receipt of a Notice of Intent to Displace or as a result of inducement or encouragement by the public entity.

**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 Costa Mesa.

**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**