

AGENDA

ALISO VIEJO CITY COUNCIL
WEDNESDAY, NOVEMBER 01, 2023
7:00 PM REGULAR MEETING

City Hall
Council Chambers
12 Journey
Aliso Viejo, CA



Mayor Richard W. Hurt
Mayor Pro Tem Mike Munzing
Councilmember Tiffany Ackley
Councilmember Ross Chun
Councilmember Max Duncan

WELCOME to the City of Aliso Viejo City Council meeting. Those persons wishing to address the City Council are requested to complete and submit to the City Clerk a "Request to Address City Council" form available at the entrance to the City Council Chambers. Speakers will be called at the appropriate time as their interested matter is heard. COMMENTS WILL BE LIMITED TO THREE MINUTES PER SPEAKER. Council proceedings are recorded.

It is the City's intention to comply with the Americans with Disabilities Act (ADA). If you need special assistance to participate in the meeting, the City will make reasonable arrangements to ensure accessibility and/or accommodations. [28 CFR 35.102-35.104 ADA Title II] Please contact the City Clerk's Office at (949) 425-2505 at least 48 hours prior to the meeting.

Regular meetings of the City Council are held on the first and third Wednesday of the month at the City Hall Council Chambers, 12 Journey, Aliso Viejo. Copies of the agenda are available in the lobby at City Hall on the Thursday preceding a regularly scheduled City Council meeting. All communications received by the City regarding an agenda item have been included in the agenda materials. Supplemental documents relating to specific agenda items, including communications received after agenda delivery, are presented at the dais and in the Public Copy agenda binder at the time of the meeting. Supplemental documents are also available for review in the City Clerk's office, 12 Journey, Aliso Viejo. For more information, please contact City Hall at (949) 425-2505.

This meeting will be broadcast live on Cox Communications Channel 851, AT&T U-Verse Channel 99 and the City's website. By attending the City Council Meeting, you are giving your permission to be televised. The Council Meetings are rebroadcast on Wednesday at 7:00 p.m. on Cox Communications Channel 851, AT&T U-Verse Channel 99, and can be viewed on the internet at www.avcity.org.

DAVID A. DOYLE
CITY MANAGER

SCOTT C. SMITH
CITY ATTORNEY

MITZI ORTIZ
CITY CLERK

**PLEASE SILENCE ALL CELL PHONES AND OTHER
ELECTRONIC EQUIPMENT WHILE CITY COUNCIL IS IN SESSION**

CALL TO ORDER: CONVENE REGULAR MEETING

ROLL CALL

PLEDGE OF ALLEGIANCE:

1. SPECIAL PRESENTATIONS:

1.1. VETERANS DAY VIDEO PRESENTATION

2. ADDITIONS, DELETIONS, REORDERING TO THE AGENDA:

3. COMMUNITY INPUT:

Members of the public wishing to address the City Council are requested to complete and submit to the City Clerk a "Request to Address City Council" form available at the entrance to the City Council Chambers. In compliance with the Brown Act, no discussion or action may be taken on comments received at this time, except the City Council may briefly respond to statements made or questions posed. Comments are limited to three (3) minutes per speaker.

4. CONSENT CALENDAR:

All matters listed on the Consent Calendar will be acted upon by one vote unless members of the City Council, or staff request a matter to be discussed and/or removed from the Consent Calendar for separate action. Items removed from the Consent Calendar will be discussed and voted upon immediately following City Council action on the remainder of the Consent Calendar.

4.1. WAIVE THE READING OF ALL ORDINANCES AND RESOLUTIONS

Recommended Action: Approve the reading by title only of all ordinances and resolutions wherein the titles appear on the public agenda; said titles shall be determined to have been read by title, and further reading is waived.

4.2. APPROVAL OF MINUTES

Recommended Action: Approve the Minutes as submitted for the October 4, 2023 Special Meeting and October 4, 2023 Regular Meeting.

[Draft Minutes - October 4, 2023 Special Meeting](#)

[Draft Minutes - October 4, 2023 Regular Meeting](#)

4.3. ACCOUNTS PAYABLE

Recommended Action: Ratify accounts payable checks and electronic funds transfers issued between September 15 and October 12, 2023, in the amount of \$1,628,760.35.

[Staff Report](#)

[Attachment 1 - Accounts Payable Report](#)

4.4. TREASURER'S STATEMENT - SEPTEMBER 2023

Recommended Action: Receive and file the September 2023 Treasurer's Statement.

[Staff Report](#)

[Attachment 1 – September 2023 Treasurer's Statement](#)

4.5. PROPERTY ACQUISITION – 89 PLAYA CIRCLE

Recommended Action:

1. Authorize the City Manager to execute a purchase and sale agreement in a form acceptable to the City Attorney for 89 Playa Circle, #R, Aliso Viejo, CA 92656 in an amount not to exceed \$180,000 and direct the City Manager to take all necessary steps to secure title to the property;
2. Find that the purchase of the property is exempt from the California Environmental Quality Act pursuant to State CEQA Guidelines Sections 15301 (Existing Facilities);
3. Authorize the appropriation of Community Development Block Grant funds in the amount of \$245,000 to the Fiscal Year 2023-24 budget for the purchase, loan payoff, due diligence, associated closing costs, and necessary repairs for the property; and
4. Find that the purchase of the property is in conformance with the City's General Plan.

[Staff Report](#)

4.6. PURCHASE OF SCALE COMPUTING HYPERCONVERGED APPLIANCE FOR VIRTUALIZATION, STORAGE, BACKUP AND DISASTER RECOVERY

Recommended Action: Approve and authorize the City Manager to purchase Scale Computing Hyperconverged appliance from SHI International to meet the City's virtualization, storage, backup, and disaster recovery needs for an amount not to exceed \$75,000.

[Staff Report](#)

[Attachment 1 - Quote](#)

4.7. CITY COUNCIL DEFERRED COMPENSATION BENEFIT

Recommended Action: Adopt a Resolution directing monthly benefit allowances for Council Members to be equal to the cash-in-lieu health benefit available to City employees and reduce that amount by the minimum contribution required pursuant to Government Code section 22892(b)(1) for any City Council member that participates in a City offered health insurance plan pursuant to the Public Employees' Medical and Hospital Care Act (PEMHCA).

[Staff Report](#)

[Attachment 1 - Resolution](#)

5. PUBLIC HEARINGS:

5.1. CONSIDERATION OF A SUBSTANTIAL AMENDMENT TO THE 2023-2027 CONSOLIDATION PLAN AND 2023-2024 ANNUAL ACTION PLAN FOR EXPENDITURES OF COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) FUNDS

Recommended Action:

1. Conduct a public hearing;
2. Declare that the City Council find the amendment to the Fiscal Year (“FY”) 2023-2027 Consolidated Plan and the FY 2023-2024 Annual Action Plan is not subject to the California Environmental Quality Act (“CEQA”) because the activity is not a project as defined in Section 15378 (b)(5) of the State CEQA Guidelines;
3. Approve and adopt, via minute order, the amendment to the FY 2023-2027 Consolidated Plan and the FY 2023-2024 Annual Action Plan for the use of Community Development Grant Block (CDBG) funds; and
4. Authorize the City Manager to submit the amendment to the Consolidated Plan and Annual Action Plan to the United States Department of Housing and Urban Development (“HUD”) and authorize the City Manager to execute and submit all related documents to implement the amended plans.

[Staff Report](#)

[Attachment 1 - CDBG Plan Amendment](#)

6. DISCUSSION:

6.1. BY-DISTRICT ELECTIONS COMMUNICATION STRATEGY

Recommended Action: Receive and file.

[Staff Report](#)

7. CITY MANAGER' S REPORT:

8. ANNOUNCEMENTS / COUNCIL COMMENTS / COMMITTEE UPDATES:

9. ADJOURNMENT:

The next regularly scheduled City Council meeting is November 15, 2023.

CITY OF ALISO VIEJO
CITY COUNCIL MINUTES
SPECIAL MEETING
October 4, 2023, 6:30 PM
Council Chambers, City Hall, 12 Journey
Aliso Viejo, California

CALL TO ORDER: Mayor Hurt called the Special Meeting of the City Council of the City of Aliso Viejo to order at 6:30 p.m.

ROLL CALL:

PRESENT: MAYOR RICHARD W. HURT
MAYOR PRO TEM MIKE MUNZING
COUNCILMEMBER TIFFANY ACKLEY
COUNCILMEMBER ROSS CHUN

ABSENT: COUNCILMEMBER MAX DUNCAN

STAFF PRESENT: DAVID A. DOYLE, CITY MANAGER
SCOTT C. SMITH, CITY ATTORNEY

PUBLIC COMMENTS:

None.

CLOSED SESSION:

CONFERENCE WITH LEGAL COUNSEL- ANTICIPATED LITIGATION
Initiation of Litigation Pursuant to Government Code Section 54956.9(d)(4)
Number of Potential Cases: 1

CONFERENCE WITH LABOR NEGOTIATORS
Pursuant to Government Code Section 54957.6
Agency Designated Representatives: City Manager and City Attorney
Unrepresented Employees: All Employees

REPORT FROM CLOSED SESSION:

City Attorney Scott Smith stated no reportable action was taken.

ADJOURNMENT: Mayor Hurt adjourned the meeting at 7:09 p.m. to the October 4, 2023 Regular Council Meeting.

Respectfully submitted:

Approved by:

MITZI ORTIZ, MMC
CITY CLERK

RICHARD HURT
MAYOR

DRAFT

CITY OF ALISO VIEJO
CITY COUNCIL MINUTES
REGULAR MEETING
OCTOBER 4, 2023, 7:00 PM
Council Chambers, City Hall, 12 Journey
Aliso Viejo, California

CALL TO ORDER: Mayor Hurt called the Regular Meeting of the City Council of the City of Aliso Viejo to order at 7:12 p.m.

ROLL CALL

PRESENT: MAYOR RICHARD W. HURT
MAYOR PRO TEM MIKE MUNZING
COUNCILMEMBER TIFFANY ACKLEY
COUNCILMEMBER ROSS CHUN

ABSENT: COUNCILMEMBER MAX DUNCAN

STAFF PRESENT: DAVID A. DOYLE, CITY MANAGER
SCOTT C. SMITH, CITY ATTORNEY
MITZI ORTIZ, CITY CLERK
ANN EIFERT, FINANCIAL SERVICES DIRECTOR
SO KIM, COMMUNITY DEVELOPMENT DIRECTOR
CINDY COLLINS, INTERIM COMMUNITY SERVICES MANAGER
ISAAC AZIZ, INFORMATION TECHNOLOGY MANAGER
PATRICIA CANTONWINE, HUMAN RESOURCES ANALYST
CAPT. ALAN VILLANUEVA, CHIEF OF POLICE SERVICES

PLEDGE OF ALLEGIANCE: Mayor Pro Tem Munzing led the pledge of allegiance.

REPORT FROM CLOSED SESSION:

City Attorney Scott Smith stated there was no reportable action taken.

1. SPECIAL PRESENTATIONS:

1.1. FEATURED BUSINESS OF THE MONTH - PEDIATRIC DENTISTRY

Mayor Hurt introduced the video and presented the certificate of recognition to Owner Dr. Joanne Suarez Martinez. Dr. Suarez Martinez introduced her staff and expressed her appreciation.

1.2. PROCLAMATION – FIRE PREVENTION WEEK

Mayor Hurt presented the proclamation to Orange County Fire Authority Chief Baryic Hunter. Chief Hunter expressed his appreciation and commented on the importance of the designation.

1.3. MOULTON NIGUEL WATER DISTRICT PRESENTATION REGARDING PROJECT & DISTRICT UPDATES

Mayor Hurt welcomed the Moulton Niguel Water District (MNWD) staff. Assistant General Manager Matt Collings, Assistant Director of Engineering Todd Dmytryshyn, Water Resources Manager Laura Rocha, and Principal Engineer Alex Thomas provided the presentation regarding project and district updates.

2. ADDITIONS, DELETIONS, REORDERING TO THE AGENDA:

None.

3. COMMUNITY INPUT:

1. Michele Saward expressed concern with the proposed apartment complex and landscaping in The Commons shopping center.

4. CONSENT CALENDAR:

Unless otherwise indicated below, the following pertains to all items on the Consent Calendar.

Motion: Mayor Pro Tem Munzing moved and Councilmember Ackley seconded to approve the recommended actions. Motion carried 4-0-1, with Councilmember Duncan absent.

4.1. WAIVE THE READING OF ALL ORDINANCES AND RESOLUTIONS

Recommended Action: Approve the reading by title only of all ordinances and resolutions wherein the titles appear on the public agenda; said titles shall be determined to have been read by title, and further reading is waived.

4.2. APPROVAL OF MINUTES

Recommended Action: Approve the Minutes as submitted for the September 6, 2023 Special Meeting and September 6, 2023 Regular Meeting.

4.3. ACCOUNTS PAYABLE

Recommended Action: Ratify accounts payable checks and electronic funds transfers issued between August 18 and September 14, 2023, in the amount of \$1,341,486.05.

4.4. TREASURER'S STATEMENT – AUGUST 2023

Recommended Action: Receive and file the August 2023 Treasurer's Statement.

4.5. COMMUNITY FACILITIES DISTRICT NO. 2005-01 (GLENWOOD AT ALISO VIEJO) LOCAL AGENCY SPECIAL TAX AND BOND ACCOUNTABILITY ACT COMPLIANCE (SB 165) REPORT FOR FISCAL YEAR ENDED JUNE 30, 2023

Recommended Action: For City Council to accept and file the Community Facilities District No. 2005-01 (Glenwood at Aliso Viejo) Local Agency Special Tax and Bond Accountability Act Compliance ("SB 165") Report for Fiscal Year June 30, 2023.

4.6. AWARD CONTRACT TO NIEVES LANDSCAPE, INC. FOR THE CITY HALL LANDSCAPE AND IRRIGATION IMPROVEMENT PROJECT

Recommended Action:

1. Approve Contract Documents, Specifications, and Plans for the City Hall Landscape and Irrigation Improvement Project;
2. Award a contract in the amount of \$157,314 to Nieves Landscape, Inc. as the lowest responsible bidder for the City Hall Landscape and Irrigation Improvement Project;
3. Authorize the City Manager to execute a contract with Nieves Landscape, Inc.;
4. Authorize City staff to make total compensation to Nieves Landscape, Inc. up to \$157,314 plus \$31,462.80 (20% of the contract amount) to allow for contingencies, totaling \$188,776.80; and
5. Declare this project categorically exempt from the California Environmental Quality Act (CEQA) process Per Title 14 of the California Code of Regulations, Chapter 3, Article 19, Section 15301 (Class 1: Existing Facilities).

4.7. RELEASE OF BONDS FOR THE GRADING AND LANDSCAPING IMPROVEMENTS FOR THE 15-25 ENTERPRISE GRADING AND LANDSCAPING CONSTRUCTION PROJECT

Recommended Action: Adopt Resolution No. 2023-28 exonerating Grading Surety Bond No. SU1190293 and Landscaping Surety Bond No. SU1190294 for the 15-25 Enterprise Grading and Landscaping Construction Project.

4.8. CALRECYCLE RESOLUTION FOR GRANT FUNDING

Recommended Action: Adopt Resolution No. 2023-29 authorizing submittal of applications for all CalRecycle grants and payment programs for which the City of Aliso Viejo is eligible.

4.9. ADOPTION OF THE 2022-2023 CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT (CAPER) FOR EXPENDITURES OF COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) FUNDS

Recommended Action:

1. Find that the 2022-2023 Consolidated Annual Performance and Evaluation Report (CAPER) is not subject to the California Environmental Quality Act (CEQA) because the activity is not a project as defined in Section 15378 (b)(5) of the State CEQA Guidelines;
2. Approve and adopt the 2022-2023 CAPER; and
3. Authorize the City Manager to submit the CAPER to the United States Department of Housing and Urban Development (HUD) and authorize the City Manager to submit all related documents.

5. **PUBLIC HEARINGS:**

None.

6. **DISCUSSION:**

6.1. COMMUNITIES FACILITIES DISTRICT NO. 2005-01 (GLENWOOD AT ALISO VIEJO) – 2023 SPECIAL TAX REFUNDING BONDS

City Manager David Doyle introduced Financial Services Director Ann Eifert, who provided an overview. Consultant Renee Vancho (Piper Sandler Senior Vice President) provided additional information. Staff responded to questions regarding interest rates.

Recommended Action:

1. Adopt Resolution No. 2023-30 authorizing the 2023 special tax refunding bonds of the Community Facilities District 2005-01 (Glenwood at Aliso Viejo), approving the form Fiscal Agent Agreement, authorizing negotiation of terms of the sale of bonds, approving a Preliminary Official Statement, authorizing preparation of a Final Official Statement; and approving other related documents and actions; and
2. Authorize the City Manager to execute necessary documents for the refinancing of the bonds.

Motion: Mayor Pro Tem Munzing moved and Councilmember Chun seconded to approve the recommended actions. Motion carried 4-0-1, with Councilmember Duncan absent.

6.2. EMPLOYEE HEALTH BENEFIT ALLOWANCE

City Manager David Doyle introduced Human Resources Analyst Patricia Cantonwine, who provided an overview.

Recommended Action: Adopt Resolution No. 2023-31 approving an increase to the employee health benefit allowance based on a tiered system determined by number of dependents, effective January 1, 2024.

Motion: Councilmember Ackley moved and Councilmember Chun seconded to approve the recommended actions. Motion carried 4-0-1, with Councilmember Duncan absent.

7. CITY MANAGER' S REPORT:

City Manager David Doyle expressed appreciation to staff.

8. ANNOUNCEMENTS / COUNCIL COMMENTS / COMMITTEE UPDATES:

Councilmember Chun:

- Attended OCFA Board of Directors Meeting
- Attended OCFA Legislation & Public Affairs Committee Meeting
- Attended OCFA Human Resources Committee Meeting
- Attended OCFA 9/11 Remembrance Ceremony
- Attended OCFA Budget & Finance Committee Meeting
- Attended SCAG Joint Policy Committee Meeting
- Attended Boy Scouts of America Orange County Council Scout-O-Rama
- Attended Capistrano Unified School District Scavenger Hunt
- Attended League of California Cities Annual Conference
- Attended Chamber of Commerce After Hours Event
- Attending LeAnn Rimes Concert at Soka Performing Arts Center
- Attended Webb's Grainworks Grand Opening events
- Attended Orange County Business Council First Responders Dinner
- Attended Family Assistance Ministries Hunger Walk
- Attended Furry Friends Pet Fair
- Attended Belmont Blooms at Belmont Village

Councilmember Ackley:

- Attended Capistrano Unified School District Scavenger Hunt
- Obtained consensus to receive update on by-district election communications

Mayor Pro Tem Munzing:

- Attended Aliso Niguel High School 30th Anniversary Celebration
- Attended Aliso Viejo Chamber of Commerce Networking Breakfast
- Attended Webb's Grainworks Grand Opening
- Attended Laguna Hills Heritage Day

Mayor Hurt:

- Attended League of California Cities Annual Conference
- Attended Capistrano Unified School District Scavenger Hunt

9. ADJOURNMENT:

Mayor Hurt adjourned the meeting at 8:17 p.m. to the regularly scheduled meeting of October 18, 2023.

Respectfully submitted:

Approved by:

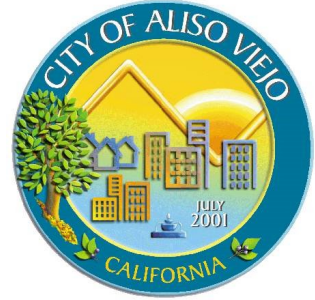
MITZI ORTIZ, MMC
CITY CLERK

RICHARD HURT
MAYOR

DRAFT

City of Aliso Viejo

AGENDA ITEM



DATE: November 1, 2023
TO: Mayor and City Council
FROM: Ann Eifert, Director of Financial Services
SUBJECT: ACCOUNTS PAYABLE

Recommended Action:

Ratify accounts payable checks and electronic funds transfers issued between September 15 and October 12, 2023, in the amount of \$1,628,760.35.

Fiscal Impact:

Expenditures in the amount of \$1,628,760.35.

Background:

The City issues accounts payable checks on bi-weekly basis and presents it to City Council for ratification at its next regularly scheduled City Council meeting.

Discussion:

The attached register containing checks and electronic funds transfers between September 15 and October 12, 2023, for a total of \$1,628,760.35 is being presented for ratification. All payments have been made in compliance with the City's purchasing policy and procedures. Payments have been reviewed and approved by the appropriate departmental staff. The issued accounts payable checks and electronic funds transfers have been reviewed and deemed in accordance with the fiscal year budget by the Director of Financial Services.

Attachment:

1. Accounts Payable Report



Accounts Payable

Vendor Name	Description (Item)	Amount
101 - GENERAL FUND		
CALIFORNIA NEWSPAPERS PARTNERSHIP	REF0011616226-8/3 ST. MARYS PHN	378.37
CALIFORNIA NEWSPAPERS PARTNERSHIP	REF0011619457-8/24 TACOS DE BIRRIA PHN	395.24
CALIFORNIA NEWSPAPERS PARTNERSHIP	REF0011620086-8/24 POLARIS EXTENSION PHN	1,415.24
DE NOVO PLANNING GROUP	CEQA CONSULTING	1,675.00
ADVANCED PERMIT SERVICES	BLDR-2023-00269_22 EVENING LIGHT LN_ADV PERMIT SVC	304.34
ADVANCED PERMIT SERVICES	BLDR-2023-00285_80 BIRCHWOOD LN_ADV PERMIT SVCS	48.77
IPERMIT	BLDR-2023-00289_24 HEADLAND PL_IPERMIT CANCELLED	132.93
IPERMIT	BLDR-2023-00308_18 MAYFLOWER_IPERMIT CANCELLED	132.93
IPERMIT	PLMR-2023-0034418 MAYFLOWER_IPERMIT CANCELLED	43.03
IPERMIT	MECR-2023-00202_24 HEADLAND PL_IPERMIT CANCELLED	64.89
CITY LIGHTS - ALISO VIEJO, LLC	BLDC-2023-00014 TRANSP CORR REFUND	29,816.64
IMPACT ROOFING	CD-2023-00057_6 PINEOAK_IMPACT ROOFING	500.00
UNITED OF OMAHA LIFE INSURANCE CO.	OCT'23 LIFE INSURANCE	1,487.35
CALPERS HEALTH	OCT'23 CALPERS HEALTH PREMIUM	24,211.46
CALPERS HEALTH	OCT'23 HEALTH PREMIUM - RC	1,815.15
RJM DESIGN GROUP INC	AUG'23 ENG2247/SUMMIT IV 15-25 ENTERPRISE INSPECT	603.60
STC TRAFFIC, INC	AUG'23 ON-CALL TRAFFIC CONSULTANT SERVICES	875.00
CALIFORNIA POOLS, INC	3010_17 KEY LARGO_CALIFORNIA POOLS INC	3,000.00
CALIFORNIA POOLS, INC	21-09-073_68 HUMMING BIRD LN_CALIFORNIA POOLS INC	3,000.00
CALIFORNIA POOLS, INC	21-11-097_9 BLACKBIRD LN_CALIFORNIA POOLS INC	3,000.00
CDG BUILDERS INC	BLDC-2022-00068_27372 ALISO CREEK RD_CDG BUILDERS	3,000.00
J FLORES ROOFING	BLDR23-00334_28 WINDFLOWER_J FLORES ROOFING	500.00
SUNRUN INSTALLATION SERVICES	PVR-2022-00131_24771 VIA SAN MARCO_CANCELED PERMIT	153.50
SUNRUN INSTALLATION SERVICES	PVR-2022-00166_12 MAPLE DR_CANCELED PERMIT	153.50
SUNRUN INSTALLATION SERVICES	PVR-2022-00146_10 BIRCH DR_CANCELED PERMIT	153.50
SUNRUN INSTALLATION SERVICES	PVR-2022-00152_22 MALLORN DR_CANCELED PERMIT	153.50
SUNRUN INSTALLATION SERVICES	PVR-2022-00153_8 SEQUOIA DR_CANCELED PERMIT	153.50
SUNRUN INSTALLATION SERVICES	PVR-2022-00178_44 BEECH DR_CANCELED PERMIT	153.50
SUNRUN INSTALLATION SERVICES	PVR-2022-00230_10 DAWN LN_CANCELED PERMIT	153.50
SUNRUN INSTALLATION SERVICES	PVR-2022-00219_20 BLUFF COVE DR_CANCELED PERMIT	153.50
SUNRUN INSTALLATION SERVICES	PVR-2022-00230_10 DAWN LN_CANCELED PERMIT	40.03
		77,667.97
CITY COUNCIL		
STAPLES ADVANTAGE	SEP '23 OFFICE SUPPLIES CITY COUNCIL	31.01
CALPERS HEALTH	OCT'23 HEALTH PREMIUM PEMHCA MINIMUM - RC	151.00
AT&T	8/17/23-9/16/23 AT&T FIRSTNET CITY COUNCIL PHONES	236.61
	CITY COUNCIL TOTAL:	418.62
CITY MANAGER		
CALPERS HEALTH	OCT'23-PG-HEALTH PREMIUM	151.00
AT&T	8/17/23-9/16/23 AT&T FIRSTNET CITY MANAGER PHONE	50.34
AT&T	8/17/23-9/16/23 AT&T FIRSTNET HR PHONE	50.34
	CITY MANAGER TOTAL:	251.68
ECONOMIC DEVELOPMENT		
ERIC WINTER	OCT'23-BUS OF MO_PEDIATRIC DENTISTRY/DR. MARTINEZ	772.19
EFUEL LLC	APR-JUN'23 - EFUEL 2Q2023 SALEX TAX	191,613.10
	ECONOMIC DEVELOPMENT TOTAL:	192,385.29
HUMAN RESOURCES		
US BANK PURCHASING CARD PROGRAM	PC 9/06 - LCW FLSA WEBINAR	600.00
MAGELLAN BEHAVIORAL HEALTH	APR'23-MAR'24-EAP	2,000.40
US BANK PURCHASING CARD PROGRAM	MO 9/7 JOB POSTING ON CCAC FOR MA	300.00
OC FAMILY MEDICINE	JUL-AUG'23 TB TESTS & EMPLOYEE EXAMS & FLU SHOTS	725.00
	HUMAN RESOURCES TOTAL:	3,625.40
CITY CLERK		
CALIFORNIA NEWSPAPERS PARTNERSHIP	REF0011618445-8/17&24 HUNT/REF0011618491-8/17&24CH	1,654.34
STAPLES ADVANTAGE	SEP '23 OFFICE SUPPLIES CITY CLERK	30.16

Vendor Name	Description (Item)	Amount
US BANK PURCHASING CARD PROGRAM	MO 9/1 CREDIT OF OMNI LA COSTA VALET (REVERSAL)	(96.00)
US BANK PURCHASING CARD PROGRAM	MO 9/1 OMNI LA COSTA VALET	96.00
SOUTHERN CALIFORNIA SHREDDING INC	SHREDDING 9/20/23 MIN SVC CHRGE UP TO 10 BOXES	85.00
PAYAL AVELLAN	2022 CANDIDATE STATEMENT REFUND - PAYAL AVELLAN	55.80
	CITY CLERK TOTAL:	1,825.30
CITY ATTORNEY		
BEST BEST & KRIEGER	AUG'23 BBK LITIGATION - CC	366.90
BEST BEST & KRIEGER	AUG'23 BBK GENERAL RETAINER LEGAL SERVICES	24,150.00
BEST BEST & KRIEGER	AUG'23 BBK LABOR & EMPLOYMENT	585.00
BEST BEST & KRIEGER	AUG'23 BBK LABOR & BENEFITS	735.80
BEST BEST & KRIEGER	AUG'23 MAJOR GENERAL PLAN UPDATE	1,156.00
BEST BEST & KRIEGER	AUG'23 BBK AIR FREEDOM LANE	270.00
BEST BEST & KRIEGER	AUG'23 BBK GENERAL LITIGATION	6,118.10
BEST BEST & KRIEGER	AUG'23 BBK 89 PLAYA CIRCLE	1,356.34
BEST BEST & KRIEGER	AUG'23 BBK CVRA DEMAND	585.00
BEST BEST & KRIEGER	AUG'23 BBK GENERAL PLAN TOWN CTR SPECIFIC PLAN	3,410.20
	CITY ATTORNEY TOTAL:	38,733.34
FINANCE		
MGT OF AMERICA LLC	FY23-24 SB90 STATE MANDATE COST - KICKOFF	1,350.00
US BANK PURCHASING CARD PROGRAM	AE 8/23 GFOA ACCNTNG FOR CAPITAL ASSETS 2ND ED	97.25
US BANK N.A. - CUSTODY	JUL-SEP'23 CUSTODIAN CHARGES	657.25
CALPERS HEALTH	OCT'23 CALPERS ADMIN FEE	83.26
CALPERS HEALTH	OCT'23 CALPERS ADMIN FEE	6.29
PARS	JUL'23 PARS REP FEES	300.00
HINDERLITER DE LLAMAS & ASSOCIATES	JUL-SEP'23 SALES TAX CONTRACT SERVICE	1,826.31
	FINANCE TOTAL:	4,320.36
INFORMATION TECHNOLOGY		
AT&T	9/06/23-10/05/23 CH-ALARM/POTS LINE	2,819.61
COX COMMUNICATIONS, INC	SEP'23 ACCT#9302 CH SERVER ROOM INTERNET	85.39
US BANK PURCHASING CARD PROGRAM	IA 8/28 EOC YOUTUBE SUBSCR	72.99
US BANK PURCHASING CARD PROGRAM	IA 9/16 WAITWHILE SUBSCRIPTION	159.00
US BANK PURCHASING CARD PROGRAM	IA 8/31 MISAC	390.00
US BANK PURCHASING CARD PROGRAM	IA 9/11 MISAC	875.00
GOTO COMMUNICATIONS	OCT'23 CH GOTO VOIP SERVICE & SUPPORT	1,995.70
GOTO TECHNOLOGIES USA, INC	7/19/23-7/18/24 ANNUAL GOTO RESOLVE STANDARD	2,280.00
TANGENT COMPUTERS INC	9/23/23-10/22/23 CH O365 LICENSING AND SUPPORT	2,999.86
LUNAVI, INC	OCT'23 OFFSITE BACKUP STORAGE	1,184.19
COX COMMUNICATIONS, INC	SEP'23 ACCT#0202 CH CABLE TV	178.10
COX COMMUNICATIONS, INC	SEP'23 ACCT#8802 CH INTERNET-FIBER 600MB	1,500.00
AT&T	8/17/23-9/16/23 AT&T FIRSTNET EOC MIFI	160.96
AT&T	8/17/23-9/16/23 AT&T FIRSTNET CH MIFI	163.96
AT&T	8/17/23-9/16/23 AT&T FIRSTNET EOC PHONES LINES	107.95
AT&T	8/17/23-9/16/23 AT&T FIRSTNET FLEET COMPLETE GPS	201.92
SHI INTERNATIONAL CORP	8/24/23-8/23/24 MANAGE ENGINE OS DEPLOYER ANNUAL	1,529.42
SHI INTERNATIONAL CORP	8/12/23 - 8/12/24 CH ADOBE LICENSE	5,073.60
GOVERNMENTJOBS.COM INC	FY23-24 NEOGOV SUBSCRIPTION & SOFTWARE SERVICES	16,018.00
	INFORMATION TECHNOLOGY TOTAL:	37,795.65
NON-DEPARTMENTAL		
CERTIFIED RECORDS MANAGEMENT	OCT'23 - RECORDS OFF SITE STORAGE	463.48
RICOH USA	OCT'23 RICOH C5200S COPY ROOM LEASE (3260)	727.71
RICOH USA	OCT'23 RICOH C5200S COPY ROOM LEASE INTEREST(3260)	2.21
BLUETRITON BRANDS INC	SEP'23 CH-COFFEE/WATER FILTRATION & FLTR SVC	59.00
IPROMOTEU.COM INC	CITY LOGO ENVELOPES - 1000 CT	425.61
IPROMOTEU.COM INC	BUS CARDS-K.DAVIS	67.83
CONSOLIDATED ELECTRICAL DISTRIBUTORS, INC	OCT'23 VISTA PARK LIGHTING MISC PARTS	351.64
RICOH USA	OCT'23 2504EX FRONT COUNTER PRINTS (4456)	179.89
RICOH USA	OCT'23 RICOH RSI CLOUD SUBSCRIPTION (SW1860708)	22.05
CINTAS CORPORATION NO. 2	SEP'23 - CH FIRST AID SUPPLIES	282.01
STAPLES ADVANTAGE	SEP '23 - COPY&BREAKROOM SUPPLIES NON DEPARTMENTAL	884.47
VOYAGER FLEET SYSTEMS INC	SEP'23 MOTORCYCLE FUEL - CITY	585.28
US BANK PURCHASING CARD PROGRAM	KB 9/08 ADVANCE AUTO PARTS - REC CAR BATTERY	290.91
US BANK PURCHASING CARD PROGRAM	LL 9/6 CC DINNER SGT. PEPPERONI	205.53
US BANK PURCHASING CARD PROGRAM	LL 9/6 CC SNACKS & DRINKS COSTCO INSTACART	134.67
ALISO VIEJO SELF STORAGE	NOV'23-MAY'24 STORAGE UNIT RENT #535 + SEP'23 LIEN	3,175.00

Vendor Name	Description (Item)	Amount
HARBOR STATION MAINTENANCE	OCT'23 35 PLAYA CIR HOA FEES + LATE FEES	171.50
GLENWOOD MAINTENANCE CORPORATION	OCT'23 35 PLAYA CIR HOA FEES + SEP'23 LATE CHG	161.70
VANTIS MAINTENANCE CORPORATION	OCT'23 COLONIAL WAY HOA FEES	374.79
ALISO VIEJO COMMUNITY ASSOCIATION	OCT-DEC'23 35 PLAYA CIR MASTER HOA FEES	135.12
HARBOR STATION MAINTENANCE	SEP'23 35 PLAYA CIR HOA FEES	231.00
ALISO VIEJO SELF STORAGE	9/17-11/16/23 STORAGE UNIT RENT #535	945.00
DS SERVICES OF AMERICA, INC	8/31 CH BOTTLED WATER SERVICE	30.37
IPROMOTEU.COM INC	LOGO MAILING LABELS-6 PER SHT/1200 LABELS	313.28
RICOH USA	SEP'23 2504EX (FRONT COUNTER) PRINTS (4456)	249.19
RICOH USA	SEP'23 RICOH RSI CLOUD SUBSCRIPTION (SW1860708)	22.05
RICOH USA	SEP'23 2504 BACK OFFICE PRINTES (4542)	93.39
NIEVES LANDSCAPE INC	SEP'23 VISTA LANDSCAPE SERVICES	1,028.96
VOYAGER FLEET SYSTEMS INC	JUL'23 MOTORCYCLE FUEL - CITY	411.43
VOYAGER FLEET SYSTEMS INC	AUG'23 MOTORCYCLE FUEL - CITY	859.16
NON-DEPARTMENTAL TOTAL:		12,884.23

C. S. ADMINISTRATION

UNITED SITE SERVICES OF CALIFORNIA, INC	12/01-12/02/22 TREE LIGHTING EVT - RESTROOM RENTAL	525.65
AMAZON CAPITAL SERVICES INC	RETURN OF BROKEN TOY STORY DVD	(9.99)
AMAZON CAPITAL SERVICES INC	RETURN OF NEW TOY STORY DVD	(26.95)
AMAZON CAPITAL SERVICES INC	SEP'23 AVR COFFEE K-CUPS	41.01
LAGUNA CANYON FOUNDATION	FY23-24 LAGUNA CANYON FOUNDATION GRANT FUNDING	1,000.00
CABCO YELLOW INC	JUN'23 SMP FUND R&CS CONTRIB TRANSPORTATION SVC	560.00
THE GLENNWOOD FOUNDATION, INC	FY23-24 COMMUNITY ASSISTANCE GRANT - GLENWOOD	2,500.00
WELLNESS & PREVENTION FOUNDATION	FY23-24 CAG - WELLNESS & PREVENTION CENTER	2,000.00
US BANK PURCHASING CARD PROGRAM	JNL 9/09 OC WINEMART - STAFF MEALS FOR PET FAIR	56.67
US BANK PURCHASING CARD PROGRAM	JNL 8/25 DOMINOS - STAFF MEALS FOR MOVIE EVENTS	22.60
US BANK PURCHASING CARD PROGRAM	JNL 8/24 SMART&FINAL - MOVIE NIGHT SUPPLIES	18.30
CALPERS HEALTH	OCT'23-HW-HEALTH PREMIUM	151.00
CALPERS HEALTH	OCT'23-DP-HEALTH PREMIUM	151.00
AMAZON CAPITAL SERVICES INC	SEP'23 TOY STORY DVD + TAX- RETURNED DUE TO DAMAGE	9.99
AMAZON CAPITAL SERVICES INC	SEP'23 TOY STORY DVD + TAX - NEW COPY	26.95
CABCO YELLOW INC	AUG'23 SMP TRANSPORTATION SERVICES	591.50
LAURA'S HOUSE	FY23-24-COMMUNITY ASSISTANCE GRANT-LAURA'S HOUSE	2,250.00
C. S. ADMINISTRATION TOTAL:		9,867.73

IGLESIA PARK

PV MAINTENANCE INC	SEP'23 IGLESIA PARK MAINTENANCE	356.00
PV MAINTENANCE INC	SEP'23 IGLESIA PARK M AINTENANCE	306.00
EL TORO WATER DISTRICT	AUG'23 MTR#4114 IGLESIA PARK	981.86
EL TORO WATER DISTRICT	AUG'23 MTR#3499 IGLESIA PARK	1,133.51
NIEVES LANDSCAPE INC	SEP'23 IGLESIA LANDSCAPE SERVICES	6,846.00
IGLESIA PARK TOTAL:		9,623.37

IGLESIA BUILDING

TEAM ONE MANAGEMENT SERVICES	SEP'23 IGELSIA JANITORIAL SERVICES	1,670.00
ZAPP PEST MANAGEMENT	SEP'23 PEST CONTROL SERVICES - IGLESIA PARK	75.00
SONITROL ORANGE COUNTY LLC	OCT'23 IGLESIA ACCESS CONTROL	104.18
ORANGE COUNTY FIRE PROTECTION	FY23-24 IGLESIA FIRE EXTINGUISHER MAINT	135.28
EL TORO WATER DISTRICT	AUG'23 MTR#5016 IGLESIA PARK BLDG	240.82
IGLESIA BUILDING TOTAL:		2,225.28

IGLESIA PARK COMMUNITY CENTER

BOYS & GIRLS CLUB OF CAPISTRANO VALLEY	JUL'23 ELEMENTARY & TEEN KEYSTONE PROGRAM	22,019.65
IGLESIA PARK COMMUNITY CENTER TOTAL:		22,019.65

PLANNING

REBECCA J CAHA	SEP'23 AFFORD.HOUSING CONSULTANT SERVICES	1,050.00
AMBER GREGG NICHOLAS	AUG'23 HOUSING ELEMENT CONSULTING	6,445.00
US BANK PURCHASING CARD PROGRAM	IA 8/30 CONSTANTCONTACT.COM SUBSCR	45.00
US BANK PURCHASING CARD PROGRAM	SK 8/31 PARKING TICKET FOR APA SYMPOSIUM	8.00
CALPERS HEALTH	OCT'23-MF-HEALTH PREMIUM	151.00
REBECCA J CAHA	AUG'23 AFFORD.HOUSING CONSULTANT SERVICES	2,100.00
OC COUNCIL OF GOVERNMENTS	AERIAL IMAGERY	3,000.00
PLANNING TOTAL:		12,799.00

BUILDING

STAPLES ADVANTAGE	AUG'23 OFFICE SUPPLIES	459.65
BUILDING TOTAL:		459.65

Vendor Name	Description (Item)	Amount
ENGINEERING (GENERAL)		
PV MAINTENANCE INC	SEP'23 ALISO CREEK CLEAN-UP EVENT	965.00
PV MAINTENANCE INC	OCT'23 WAREHOUSE LEASE	1,035.00
US BANK PURCHASING CARD PROGRAM	EM 8/29 ACE PARKING APWA PWX PARKING	20.00
US BANK PURCHASING CARD PROGRAM	EM 9/14 THE HOME DEPOT - MISC TOOLS	52.19
COUNTY OF ORANGE	FY23-24 TMDL ALISO CREEK WATERSHED_D04-050	62,870.98
US BANK PURCHASING CARD PROGRAM	SP 8/26 APWA CONFERENCE HOTEL	1,445.76
US BANK PURCHASING CARD PROGRAM	SP 8/28 APWA CONFERENCE FOOD	94.16
US BANK PURCHASING CARD PROGRAM	SP 8/26 APWA CONFERENCE FOOD	30.90
US BANK PURCHASING CARD PROGRAM	SP 8/29 APWA CONFERENCE FOOD	28.39
US BANK PURCHASING CARD PROGRAM	SP 9/21 ASCE MEMBERSHIP RENEWAL	316.00
SHAUN PELLETIER	SEP'23 SOUTH OC ENG MEETING REIMB	31.00
QUANG LE	SEP'23 SOUTH OC ENG MEETING REIMB	31.00
AT&T	8/17/23-9/16/23 AT&T FIRSTNET PUBLIC WORKS TABLETS	120.72
ENGINEERING (GENERAL) TOTAL:		67,041.10
STREET MAINTENANCE		
PV MAINTENANCE INC	SEP'23 STREET MAINTENANCE (MOE TAX)	37,264.19
US BANK PURCHASING CARD PROGRAM	EM 8/25 THE HOME DEPOT - MISC SUPPLIES	116.99
STREET MAINTENANCE TOTAL:		37,381.18
LAW ENFORCEMENT-CONTRACT		
COUNTY OF ORANGE	OCT'23 LAW ENFRCMNT BODY CAMERAS IN-CAR VIDEO	814,017.58
LAW ENFORCEMENT-CONTRACT TOTAL:		814,017.58
LAW ENFORCEMENT-OTHER		
ALL CITY MANAGEMENT SERVICES	9/17-9/30/23 466 HRS - CROSSING GUARD SERVICES	14,422.70
US BANK PURCHASING CARD PROGRAM	RD 8/26 CHEVRON CAR WASH PATROL SERGEANT CAR	27.99
US BANK PURCHASING CARD PROGRAM	RD 9/15 THE TOLL ROADS	575.00
US BANK PURCHASING CARD PROGRAM	RD 9/04 IACP DUES	75.00
US BANK PURCHASING CARD PROGRAM	RD 9/07 SHELL EMERGENCY WATER-MAIT FATAL ACCIDENT	44.72
AT&T	8/17/23-9/16/23 AT&T FIRSTNET PALS PHONE LINE	45.31
VOYAGER FLEET SYSTEMS INC	JUL'23 MOTORCYCLE FUEL - AVPS	393.98
VOYAGER FLEET SYSTEMS INC	AUG'23 MOTORCYCLE FUEL - AVPS	34.23
ALL CITY MANAGEMENT SERVICES	8/20-9/02/23 458 HRS-CROSSING GUARD SERVICES	14,175.10
ALL CITY MANAGEMENT SERVICES	9/3-9/16/23 412 HRS - CROSSING GUARD SERVICES	12,751.40
COUNTY OF ORANGE	JUL'23 MONTHLY TECHNOLOGY DIVISION CHARGES	93.90
LAW ENFORCEMENT-OTHER TOTAL:		42,639.33
EOC		
US BANK PURCHASING CARD PROGRAM	SL 9/04 STATER BROS FOOD - NATL PREPAREDNESS MONTH	113.17
US BANK PURCHASING CARD PROGRAM	SL 8/24 ALISO COFFEE AND DONUTS FOOD - 800MHZ TRG	34.74
US BANK PURCHASING CARD PROGRAM	SL 9/14 AMAZON NATL PREPAREDNESS MONTH SUPPLIES	43.55
EOC TOTAL:		191.46
GENERAL FUND TOTAL:		1,388,173.17

102 - GEN. FD-CITY HALL

NON-DEPARTMENTAL		
PV MAINTENANCE INC	SEP'23 CH INLET CLEANING	102.00
TEAM ONE MANAGEMENT SERVICES	SEP'23 CH JANITORIAL SERVICES	2,700.00
ZAPP PEST MANAGEMENT	SEP'23 PEST CONTROL SERVICES CH	75.00
SONITROL ORANGE COUNTY LLC	OCT'23 CITY HALL INTRUSION DETECTION	367.04
SONITROL ORANGE COUNTY LLC	OCT'23 CITY HALL ACCESS CONTROL	580.38
SONITROL ORANGE COUNTY LLC	9/29 CH FIRE ALARM SERVICE CALL	210.00
GORM, INC	SEP'23 CH JANITORIAL SUPPLIES	619.86
FOSTERS' GARDENS INC	SEP'23 CH PLANT MAINTENANCE	115.00
PACIFIC PARK II ASSOCIATION	OCT'23 CH ASO ASSOCIATION DUES	425.00
THURSTON ELEVATOR CONCEPTS INC	OCT'23 CH-ELEVATOR MAINTENANCE	134.00
THE GAS COMPANY	8/31/23-10/02/23 MTR#16122180 CH GAS SERVICE	248.23
ALISO VIEJO COMMUNITY ASSOCIATION	OCT-DEC'23 CH MASTER HOA FEES	1,787.77
SO CAL EDISON	SEP'23 ACCT#7189 CITY HALL	8,707.64
NIEVES LANDSCAPE INC	SEP'23 CH LANDSCAPE MAINTENANCE	678.00
NON-DEPARTMENTAL TOTAL:		16,749.92
GEN. FD-CITY HALL TOTAL:		16,749.92

Vendor Name	Description (Item)	Amount
103 - GF-AV RECREATION SERVICES		
ALLYSON BROOKS	SEP'23 REC USER CREDIT - ALLYSON BROOKS	72.00
		72.00
RECREATION SERVICES		
AT&T	9/06/23-10/05/23 AVR-ALARM/POTS LINE	939.87
PV MAINTENANCE INC	09/28/23 AVR DRAIN CLEANING	51.00
PRESS-TIGE ENTERPRISES INC	AUG-SEP'23 DRY CLEANING	2,291.98
GARDAWORLD	OCT'23 AVR CASH COURIER SERVICE	454.77
SUNBELT RENTALS, IN	9/25 AVR 19' ELECTRIC SCISSOR LIFT & DELIVERY	3,313.31
ZAPP PEST MANAGEMENT	SEP'23 PEST CONTROL SERVICES AVR	95.00
ZAPP PEST MANAGEMENT	RAT SERVICE AROUND CACTUS - AVR	185.00
SONITROL ORANGE COUNTY LLC	OCT'23 AVCENTER AND AVQUATICS ACCESS CONTROL	119.24
SONITROL ORANGE COUNTY LLC	OCT'23 AVRANCH ACCESS CONTROL	510.07
TEAM ONE MANAGEMENT SERVICES	AUG'23 AVR JANITORIAL SERVICES	5,000.00
TEAM ONE MANAGEMENT SERVICES	SEP'23 AVR JANITORIAL SERVICES	5,080.00
GORM, INC	AUG'23 AVR RUBBER MATS KITCHEN AREA	930.61
LYONS SECURITY SERVICE IN	SEP'23 AVR EVENT SECURITY SERVICES	5,100.00
LYONS SECURITY SERVICE IN	SEP'23 GCF SECURITY SERVICES	1,237.50
FACILITRON, INC.	7/31/23-8/04/23 MINI HAWK - OC PLAYBALL - SSS	404.10
FOSTERS' GARDENS INC	SEP'23 AVR INTERIOR PLANT MAINTENANCE	110.00
HARBOR POINTE AIR CONDITIONING & CONTROL SYSTEMS	SEP'23 AVR HVAC PREVENTATIVE MAINTENANCE	2,938.09
FACILITRON, INC.	8/07/23-8/11/23 SKYHAWKS BASKETBALL	52.50
FACILITRON, INC.	7/03/23-8/04/23 DJAMS AFTERNOON CAMPS	2,960.20
RICOH USA	JUL-SEP'23 C2500 AVR PRINTS (8774)	462.90
FACILITRON, INC.	7/31/23-8/03/23 TENNIS CAMP 4 KIDS 3	126.88
CAROLYN WOJCIECHOWSKI	FALL2023-FCS179/183/221/225 DANCE-37 PARTICIPANTS	774.00
FITNESS WITH FLAVOR LLC	FALL2023-FCS187/193/196/117 HIP HOP-15 PARTICIPANT	636.00
RUIHONG LI	FALL2023-FCS215 YOGA-2 PARTICIPANTS	84.00
RUIHONG LI	FALL2023-FCS218 YOGA-4 PARTICIPANTS	168.00
SARA GUTIERREZ	FALL2023-FCS229 SENIOR BOXING-2 PARTICIPANTS	98.40
OC PLAYBALL EPC	FALL2023-FCS077 PLAYBALL-6 PARTICIPANTS	432.00
JENNIFER ANDRUS-NELSON	FALL 2023-FCS094 ETTIQUETTE-5 PARTICIPANTS	450.00
TUMBLE-N-KIDS, INC	FALL2023-FCS060/048/054 GYMNASTICS-18 PARTICIPANTS	712.80
JOY E. TORRES	FALL2023-FCS135/FCS211 YOGA-4 PARTICIPANTS	192.00
JOHN DAVID ALLEN JR	FALL2023-FCS147/143/083 TENNIS-9 PARTICIPANTS	186.00
STAPLES ADVANTAGE	SEP'23 RCS OFFICE SUPPLIES	89.42
READWRITE EDUCATIONAL SOLUTIONS INC	FALL2023-FCS006 READING MATH & MORE-3 PARTICIPANTS	498.60
BREAKTHROUGH SPORTS LLC	FALL2023-FCS262 BASKETBALL- 7 PARTICIPANTS	306.60
MUSIC MOVES ACADEMY INC	FALL2023-FCS022 MUSIC-7 PARTICIPANTS	357.00
ERNA VAN DYK	FALL2023-FCS104 WATERCOLOR-5 PARTICIPANTS	105.00
URBAN ATTIC LLC	FALL2023-FCS701/FCS702 KNIT WRKSHOP-6 PARTICIPANTS	304.80
US BANK PURCHASING CARD PROGRAM	EM 9/19 THE HOME DEPOT - AVR MISC REPAIR PARTS	23.72
FACILITRON, INC.	7/9/23-7/30/23 TINY-LITTLE-JUNIOR-HS TENNIS ACES	17.28
FACILITRON, INC.	7/24/23-7/28/23 CHALLENGER PRESCHOOL	93.20
FACILITRON, INC.	8/25/23 CITY OF AV - MOVIE NIGHT	512.93
FACILITRON, INC.	7/10/23-8/04/23 CULINARY KIDS	641.20
FACILITRON, INC.	7/24/23-7/28/23 CHALLENGER FULL DAY	372.80
GOTO COMMUNICATIONS	OCT'23 AVR GOTO VOIP SERVICE & SUPPORT	665.23
TANGENT COMPUTERS INC	9/23/23-10/22/23 AVR O365 LICENSING AND SUPPORT	529.39
FACILITRON, INC.	7/10/23-7/13/23 TENNIS CAMP 4 KIDS 2	126.88
US BANK PURCHASING CARD PROGRAM	JB 8/23 USPS DISNEY TICKET REFUND MAILED OUT	5.01
US BANK PURCHASING CARD PROGRAM	KB 8/23 THE HOME DEPOT - MISC EQUIPMENT FOR RANCH	18.26
US BANK PURCHASING CARD PROGRAM	KB 9/18 WALTERS ELECTRIC - SHIPPING FOR PARTS	21.95
US BANK PURCHASING CARD PROGRAM	KB 8/22 THE HOME DEPOT - MISC EQUIPMENT FOR RANCH	47.37
US BANK PURCHASING CARD PROGRAM	KB 8/22 JOHNSTONE SUPPLY - TOOLS FOR RANCH AC UNIT	109.04
US BANK PURCHASING CARD PROGRAM	KB 8/29 WALTERS ELECTRIC-LIGHTS RANCH PATHWAY FENC	1,715.23
SO CAL EDISON	SEP'23 ACCT#4551 FARM	780.91
SO CAL EDISON	SEP'23 ACCT#6247 AVR ELECTRICITY	3,900.07
FACILITRON, INC.	7/03/23-7/14/23 SS 1-BTS ALL SPORTS-VOLLEY-SSS 2	665.06
FACILITRON, INC.	7/17-7/28 OCPAYBALL-SKYFOOTBALL-CHALLENGER-VOLLEY	730.30
FACILITRON, INC.	07/17/23-07/21/23 FINE ART & SCULPTURE	938.65
FACILITRON, INC.	7/17/23-7/21/23 LEGO ROBOTICS & ROBOT BUILDING	159.65
GARDAWORLD	AUG'23 AVR CASH COURIER SERVICE - EXCESS PREM TIME	13.98
AT&T	8/17/23-9/16/23 AT&T FIRSTNET REC TABLET	40.24

Vendor Name	Description (Item)	Amount
AT&T	8/17/23-9/16/23 AT&T FIRSTNET REC PHONE LINES	181.24
GORM, INC	JUL'23 AVR JANITORIAL SUPPLIES	599.52
CAPISTRANO UNIFIED SCHOOL DISTRICT	JUL'23 CUSD TRANSPORTATION - SUMMER CAMP	3,993.75
NIEVES LANDSCAPE INC	SEP'23 AVR LANDSCAPE SERVICES	2,262.67
ERNA VAN DYK	FALL2023-FCS158/FCS099 ART -13 PARTICIPANTS	852.00
MOULTON NIGUEL WATER DIST	7/24/23-8/21/23 METER#1100 FARM WATER SVC	211.97
MOULTON NIGUEL WATER DIST	7/24/23-8/21/23 METER#0958 AVR WATER SVC	334.79
AARON FLORA	AUG'23 RENEWABLE FARMS - UTILITIES	(1,357.45)
AARON FLORA	AUG'23 RENEWABLE FARMS - CREDIT CARD FEES	(189.30)
AARON FLORA	JUL'23 RENEWABLE FARMS - CREDIT CARD FEES	18.60
AARON FLORA	AUG'23 RENEWABLE FARMS - 90% GROSS REVENUE	22,603.50
SHI INTERNATIONAL CORP	8/12/23 - 8/12/24 AVR ADOBE LICENSE	2,790.00
US BANK PURCHASING CARD PROGRAM	8/13/23 EM - GRAMMARLY SUBSCRIPTION	139.95
US BANK PURCHASING CARD PROGRAM	8/19/23 EM - CANVA SUBSCRIPTION	119.40
RECREATION SERVICES TOTAL:		82,446.63
GF-AV RECREATION SERVICES TOTAL:		82,518.63

203 - GAS TAX

TRAFFIC ENGINEERING

HARTZOG & CRABILL INC	SEP'23 TRAFFIC SIGNAL MONITORING	2,736.44
WOOD RODGERS, INC	AUG'23 STORM DRAIN CONDITION ASSESSMENT	720.00
HARTZOG & CRABILL INC	JUL'23 TRAFFIC SIGNAL MONITORING	1,000.00
HARTZOG & CRABILL INC	AUG'23 TRAFFIC SIGNAL MONITORING	1,500.00
TRAFFIC ENGINEERING TOTAL:		5,956.44

STREET MAINTENANCE

PV MAINTENANCE INC	SEP'23 STREET MAINTENANCE (GAS TAX)	30,488.88
PV MAINTENANCE INC	9/5/23 ALISO CREEK VEHICLE COLLISION SERVICE	534.00
PV MAINTENANCE INC	9/30/23 ALICIA/HOLLYOAK VEHICLE COLLISION SERVICE	1,608.34
SCA OF CA LLC	SEP'23 STREET SWEEPING SERVICES	8,668.66
PEAK LIGHTING & ELECTRIC INC	SEP'23 MEDIAN ELECTRICAL REPAIRS	424.69
UNDERGROUND SERVICE ALERT OF SOUTHERN CA	SEP'23 DATABASE MAINT + 30 TICKETS	62.50
EL TORO WATER DISTRICT	AUG'23 MTR#5675 CALLE CORTEZ MEDIAN	212.08
SO CAL EDISON	STREET LIGHTS AND TRAFFIC CONTROLLERS SCE	1,347.06
SO CAL EDISON	SEP'23 ACCT#7241 LS1 ST LIGHTS	17,098.50
ALISO VIEJO COMMUNITY ASSOCIATION	TRASH CAN PURCHASE & CONCRETE INSTALLATION ON AVP	8,199.08
NIEVES LANDSCAPE INC	SEP'23 MEDIANS LANDSCAPE SERVICES	1,586.00
MOULTON NIGUEL WATER DIST	7/24/23-8/21/23 METER#8838 MEDIANS	226.30
MOULTON NIGUEL WATER DIST	7/24/23-8/21/23 METER#6544 MEDIANS WATER SVC	287.13
MOULTON NIGUEL WATER DIST	7/24/23-8/21/23 METER#2066 MEDIANS WATER SVC	146.05
STREET MAINTENANCE TOTAL:		70,889.27

GAS TAX TOTAL: 76,845.71

204 - MEASURE M

GEN-MEASURE M

CABCO YELLOW INC	JUN'23 SMP M2 FUND TRANSPORTATION SVC	2,240.00
CABCO YELLOW INC	AUG'23 SMP TRANSPORTATION SERVICES	2,366.00
GEN-MEASURE M TOTAL:		4,606.00
MEASURE M TOTAL:		4,606.00

215 - PUBLIC SAFETY GRANTS

LAW ENFORCEMENT-OTHER

COUNTY OF ORANGE	OCT'23 AUTOMATED FINGERPRINT IDENTIFICATION SYSTEM	1,843.00
COUNTY OF ORANGE	OCT'23 ECITATIONS MTRCYCLE REPLCMNT MOBILE DATA	5,932.50
LAW ENFORCEMENT-OTHER TOTAL:		7,775.50
PUBLIC SAFETY GRANTS TOTAL:		7,775.50

225 - INTEGRATED WASTE MGMT FD

GEN-BEV CONTAINER RECYCLE

THE PRESTWICK GROUP INC	RECYCLE BIN_12 JOURNEY_THE PRESTWICK GROUP INC	2,530.08
GEN-BEV CONTAINER RECYCLE TOTAL:		2,530.08
INTEGRATED WASTE MGMT FD TOTAL:		2,530.08

Vendor Name	Description (Item)	Amount
231 - OTHER GRANTS		
OTHER GRANTS		
GO LIVE TECHNOLOGY INC	AUG'23 SOLAR APP IMPLEMENTATION	270.00
	OTHER GRANTS TOTAL:	270.00
	OTHER GRANTS TOTAL:	270.00
241 - TECHNOLOGY FUND		
GEN-TECHNOLOGY GRANTS		
GRANICUS INC	OCT-DEC'23 GRANICUS WEBSTREAMING	4,171.93
ERIC WINTER	SEP'23-CC MTG 9-6/SZ3-SZ6/SITEVSTS & ADMIN	892.38
	GEN-TECHNOLOGY GRANTS TOTAL:	5,064.31
	TECHNOLOGY FUND TOTAL:	5,064.31
251 - FEDERAL GRANTS		
GEN-FEDERAL GRANT		
TAD DUKE	CDBG-CV SMALL BUSINESS GRANT ACTIVITY ID #19	10,000.00
	GEN-FEDERAL GRANT TOTAL:	10,000.00
	FEDERAL GRANTS TOTAL:	10,000.00
261 - CITY FAC.-AQUATIC CENTER		
PREMIER AQUATIC SERVICES	OCT'23 AQC RETENTION FEES	(1,208.30)
		-1,208.30
GEN-AQUATIC CENTER		
COX COMMUNICATIONS, INC	SEP'23 ACCT#6701 AQC INTERNET	502.76
PV MAINTENANCE INC	SEP'23 AQC MAINTENANCE - INLET CLEANING	459.00
GARDAWORLD	OCT'23 AQC CASH COURIER SERVICE	514.38
UNITED BUILDING AND DEVELOPMENT SERVICES LLC	AUG'23 AQC CALL OUT - MAINTENANCE	271.00
ZAPP PEST MANAGEMENT	SEP'23 PEST CONTROL SERVICES AQC	75.00
KNORR SYSTEMS INC	POOL CHEMICAL CONTROLLER TESTER/CALIBRATOR PART	1,719.82
KNORR SYSTEMS INC	AUG'23 AQC PREMEIR CALL OUT - TROUBLESHOOT HEATERS	412.00
PREMIER AQUATIC SERVICES	OCT'23 AQC MANAGEMENT FEES	12,083.00
TEAM ONE MANAGEMENT SERVICES	AUG'23 AQC JANITORIAL SERVICES	2,100.00
HASA INC	AUG'23 AQC POOL CHEMICALS - CHLORINE & ACID	513.09
HASA INC	OCT'23 AQC POOL CHEMICALS - CHLROINE & ACID	1,319.50
THE GAS COMPANY	8/31/23-10/03/23 MTR#15672349 AQC GAS	3,034.54
US BANK PURCHASING CARD PROGRAM	JNL 9/13 SC SIGNS - REPLACEMENT SIGNS FOR AQC	457.94
US BANK PURCHASING CARD PROGRAM	KB 8/28 FERGUSON - PVC FIX AQUATIC CENTER	16.26
PREMIER AQUATIC SERVICES	SEP'23 REIMB AQC COSTCO- CHIPS & WATER-CONCESSIONS	51.96
PREMIER AQUATIC SERVICES	SEP'23 REIMB AQC LESLIE'S- TESTING SUPPLIES-POOL	22.60
PREMIER AQUATIC SERVICES	SEP'23 REIMB AQC AMAZON-TESTING REAGENTS	39.24
PREMIER AQUATIC SERVICES	SEP'23 REIMB AQC AMAZON- POOL SCRUBBER BRUSH	19.38
PREMIER AQUATIC SERVICES	SEP'23 REIMB AQC AMAZON- DRY ERASE MARKERS	9.67
PREMIER AQUATIC SERVICES	SEP'23 REIMB AQC AMAZON- HOOKS FOR OFFICES	11.84
PREMIER AQUATIC SERVICES	SEP'23 REIMB AQC AMAZON- COMPRESSED AIR	22.51
PREMIER AQUATIC SERVICES	SEP'23 REIMB AQC STAPLES- LAMINATION SHEETS	64.64
PREMIER AQUATIC SERVICES	SEP'23 REIMB AQC AMAZON- SIGNAGE FOR FACILITY	43.84
PREMIER AQUATIC SERVICES	SEP'23 REIMB AQC COSTCO- OUTDOOR HEATERS	420.19
NIEVES LANDSCAPE INC	SEP'23 AQC LANDSCAPE SERVICES	912.48
HASA INC	SEP'23 AQC POOL CHEMICALS - CHLORINE	990.74
PREMIER AQUATIC SERVICES	AUG'23 REIMB AQC 8/3 ICE CREAM FOR CONCESSIONS	1,765.68
PREMIER AQUATIC SERVICES	AUG'23 REIMB AQC 8/3 ICE CREAM FOR CONCESSIONS	88.28
PREMIER AQUATIC SERVICES	AUG'23 REIMB AQC 8/1 AMAZON- SAFETY EQUIPMENT	8.57
PREMIER AQUATIC SERVICES	AUG'23 REIMB AQC 8/1 AMAZON- SAFETY EQUIPMENT	270.39
PREMIER AQUATIC SERVICES	AUG'23 REIMB AQC 8/10 AMAZON LITTER - CHEM CLEANUP	32.30
PREMIER AQUATIC SERVICES	AUG'23 REIMB AQC 8/18 SWIM LESSON MATERIALS	6.47
PREMIER AQUATIC SERVICES	AUG'23 REIMB AQC 8/19 TONER FOR PRINTER	178.21
PREMIER AQUATIC SERVICES	AUG'23 REIMB AQC 8/8 AMAZON EQUIPMENT MAINT ITEMS	21.54
PREMIER AQUATIC SERVICES	AUG'23 REIMB AQC 8/14 SWIM TRAINING - SWIM MANAGER	58.00
PREMIER AQUATIC SERVICES	AUG'23 REIMB AQC 8/16 SWIM TRAINING - SWIM MANAGER	177.40
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/29RALPHS- WATER FOR CONCESSIONS	26.22
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/25 COSTCO- CHIPS CONCESSIONS	33.98
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC7/25WALKIE TALKIE CHARGER STATION	182.22

Vendor Name	Description (Item)	Amount
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/13 AMAZON-DRAIN COVERS&FLAPPER	197.03
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/10 TROY ALARMS	152.88
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/25POOL CHEMICAL TESTINGSUPPLIES	12.79
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/6 POOL CHEMICALS CHLORINE	91.93
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/25POOL CHEMICAL TESTINGSUPPLIES	19.48
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/11 STAPLES OFFICE SUPPLIES	152.99
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/1 STAPLES OFFICE SUPPLIES	155.64
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/26 SWIM LESSON STICKERS	17.59
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/26 SWIM LESSON STICKERS	16.03
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/13 AMAZON- OFFICE DOOR STOPPER	9.69
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/27 STAPLES- OFFICE SUPPLIES	161.59
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/13 AMAZON- LIFE RING ROPE	26.94
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/21 SWIM TEAM AWARDS	694.42
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/6 AMAZON- FIRST AID EQUIPMENT	178.99
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/18 AMAZON- SWIM DIAPERS	564.99
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/18 AMAZON- SWIM DIAPERS	204.00
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/18 AMAZON- SWIM DIAPERS	537.90
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/26 SWIM FINS	58.68
PREMIER AQUATIC SERVICES	JUL'23 REIMB AQC 7/29 RALPHS- SWIM BANQUET ITEMS	90.13
GEN-AQUATIC CENTER TOTAL:		32,280.33
CITY FAC.-AQUATIC CENTER TOTAL:		31,072.03

311 - STREET IMPROVEMENTS

STREETS & HIGHWAYS

ENGINEERING RESOURCES OF SOUTHERN CALIFORNIA	AUG'23 GLENWOOD REHAB DESIGN	3,155.00
STREETS & HIGHWAYS TOTAL:		3,155.00
STREET IMPROVEMENTS TOTAL:		3,155.00

GRAND TOTAL: 1,628,760.35

Fund Summary

Fund	Expense Amount	Payment Amount
101 - GENERAL FUND	1,388,173.17	1,388,173.17
102 - GEN. FD-CITY HALL	16,749.92	16,749.92
103 - GF-AV RECREATION SERVICES	82,518.63	82,518.63
203 - GAS TAX	76,845.71	76,845.71
204 - MEASURE M	4,606.00	4,606.00
215 - PUBLIC SAFETY GRANTS	7,775.50	7,775.50
225 - INTEGRATED WASTE MGMT FD	2,530.08	2,530.08
231 - OTHER GRANTS	270.00	270.00
241 - TECHNOLOGY FUND	5,064.31	5,064.31
251 - FEDERAL GRANTS	10,000.00	10,000.00
261 - CITY FAC.-AQUATIC CENTER	31,072.03	31,072.03
311 - STREET IMPROVEMENTS	3,155.00	3,155.00
Grand Total:	1,628,760.35	1,628,760.35

Report Summary

Fund Summary

Fund	Payment Amount
101 - GENERAL FUND	1,388,173.17
102 - GEN. FD-CITY HALL	16,749.92
103 - GF-AV RECREATION SERVICES	82,518.63
203 - GAS TAX	76,845.71
204 - MEASURE M	4,606.00
215 - PUBLIC SAFETY GRANTS	7,775.50
225 - INTEGRATED WASTE MGMT FD	2,530.08
231 - OTHER GRANTS	270.00
241 - TECHNOLOGY FUND	5,064.31
251 - FEDERAL GRANTS	10,000.00
261 - CITY FAC.-AQUATIC CENTER	31,072.03
311 - STREET IMPROVEMENTS	3,155.00
Grand Total:	1,628,760.35

Account Summary

Account Number	Account Name	Payment Amount
101-1203-000	ACCOUNTS RECEIVABLE	1,815.15
101-2202-000	DUE TO OTHER GOVERN	29,816.64
101-2506-000	MEDICAL INSURANCE PA	24,211.46
101-2507-000	LIFE INSURANCE PAYABL	1,487.35
101-2601-000	REFUNDABLE DEPOSIT	9,000.00
101-2602-000	PLANNING DEPOSIT	4,738.85
101-2603-000	ENGINEERING DEPOSIT	603.60
101-2606-000	C & D DEPOSIT	4,000.00
101-32010	BUILDING PERMITS	1,693.47
101-32020	ELECTRICAL PERMITS	193.53
101-32030	PLUMBING PERMITS	43.03
101-32040	MECHANICAL PERMITS	64.89
101-4-1101-4206-000	MEDICAL INSURANCE	151.00
101-4-1101-4511-000	COMMUNICATION	236.61
101-4-1101-4601-000	SUPPLIES	31.01
101-4-1501-4206-000	MEDICAL INSURANCE	151.00
101-4-1501-4511-000	COMMUNICATION	100.68
101-4-1502-4302-000	ECONOMIC DEVELOPME	772.19
101-4-1502-4781-000	C.S-OTHER	191,613.10
101-4-1503-4309-000	OTHER CONTRACTUAL S	3,025.40
101-4-1503-4520-000	MTGS/CONF./TRNG & D	600.00
101-4-1601-4303-000	LEGAL NOTICES	1,654.34
101-4-1601-4309-000	OTHER CONTRACTUAL S	85.00
101-4-1601-4520-000	MTGS/CONF./TRNG & D	0.00
101-4-1601-4525-000	ELECTION	55.80
101-4-1601-4601-000	SUPPLIES	30.16
101-4-2101-4304-000	LEGAL SERVICES	25,470.80
101-4-2101-4532-000	SPECIAL PROJECTS	2,211.34
101-4-2101-4731-000	GENERAL PLAN	4,566.20
101-4-2101-4735-000	LITIGATION	6,485.00
101-4-2501-4301-000	PROFESSIONAL SERVICE	3,176.31
101-4-2501-4309-000	OTHER CONTRACTUAL S	1,046.80
101-4-2501-4520-000	MTGS/CONF./TRNG & D	97.25
101-4-3101-4305-000	TECHNOLOGY SERVICES	7,286.58
101-4-3101-4481-000	COMPUTER EXPENSE	29,244.07
101-4-3101-4520-000	MTGS/CONF./TRNG & D	1,265.00
101-4-3501-4422-000	EQUIP RENTAL LEASE - P	727.71
101-4-3501-4431-000	BUILDING & GROUND M	2,454.71
101-4-3501-4471-000	RENT	4,583.48
101-4-3501-4513-000	PRINTING	1,373.29
101-4-3501-4516-000	FUEL	1,855.87

Account Summary

Account Number	Account Name	Payment Amount
101-4-3501-4517-000	VEHICLE MAINTENANCE	290.91
101-4-3501-4542-000	INTEREST EXPENSE - LEA	2.21
101-4-3501-4601-000	SUPPLIES	1,255.85
101-4-3501-4612-000	OPERATING SUPPLIES	340.20
101-4-4101-4206-000	MEDICAL INSURANCE	302.00
101-4-4101-4524-000	RECREATION-SENIOR TR	1,151.50
101-4-4101-4527-000	REC-CITY SPECIAL EVENT	623.22
101-4-4101-4533-000	COMMUNITY ASSISTANC	7,750.00
101-4-4101-4601-000	SUPPLIES	41.01
101-4-4102-4411-000	UTILITIES	2,115.37
101-4-4102-4431-000	BUILDING & GROUND M	7,508.00
101-4-4103-4411-000	UTILITIES	240.82
101-4-4103-4431-000	BUILDING & GROUND M	1,984.46
101-4-4104-4529-000	REC-YOUTH PROGRAMS	22,019.65
101-4-4401-4206-000	MEDICAL INSURANCE	151.00
101-4-4401-4305-000	PLANNING TECHNOLOG	3,000.00
101-4-4401-4309-000	OTHER CONTRACTUAL S	9,595.00
101-4-4401-4520-000	MTGS/CONF./TRNG & D	8.00
101-4-4401-4532-000	SPECIAL PROJECTS	45.00
101-4-4402-4601-000	SUPPLIES	459.65
101-4-4501-4471-000	RENT	1,035.00
101-4-4501-4520-000	MTGS/CONF/TRNG & DE	1,681.21
101-4-4501-4521-000	MEMBERSHIP & DUES	316.00
101-4-4501-4562-000	PERMITS	62,870.98
101-4-4501-4612-000	OPERATING SUPPLIES	172.91
101-4-4501-4701-000	NPDES	965.00
101-4-4503-4771-000	C.S-STREET MAINTENAN	37,381.18
101-4-5101-4308-000	LAW ENFORCEMENT	814,017.58
101-4-5102-4462-000	EQUIP MAINT-800MHZ	93.90
101-4-5102-4511-000	COMMUNICATION	45.31
101-4-5102-4516-000	FUEL	1,031.20
101-4-5102-4520-000	MTGS/CONF./TRNG & D	75.00
101-4-5102-4612-000	OPERATING SUPPLIES	44.72
101-4-5102-4721-000	C.S-CROSSING GUARDS	41,349.20
101-4-5401-4612-000	OPERATING SUPPLIES	191.46
102-4-3501-4411-000	UTILITIES	8,955.87
102-4-3501-4431-000	BUILDING & GROUND M	7,794.05
103-2610-000	MISC. DEPOSITS PAYABL	72.00
103-4-4105-4305-000	TECHNOLOGY SERVICES	6,276.05
103-4-4105-4309-000	OTHER CONTRACTUAL S	13,958.83
103-4-4105-4411-000	UTILITIES	4,234.86
103-4-4105-4431-000	BUILDING & GROUND M	27,600.77
103-4-4105-4451-000	FARM OPERATING EXPE	23,305.73
103-4-4105-4511-000	COMMUNICATION	221.48
103-4-4105-4561-000	TAXES/FEES/PERMITS	468.75
103-4-4105-4570-000	CITY CAMP EXPENSE	3,998.76
103-4-4105-4601-000	SUPPLIES	89.42
103-4-4105-4612-000	OPERATING SUPPLIES	2,291.98
203-4-4502-4301-000	PROFESSIONAL SERVICE	5,956.44
203-4-4503-4411-000	UTILITIES	19,741.81
203-4-4503-4771-000	C.S-STREET MAINTENAN	42,478.80
203-4-4503-4772-000	C.S-STREET SWEEPING	8,668.66
204-4-6104-4309-000	OTHER CONTRACTUAL S	4,606.00
215-4-5102-4803-000	PUBLIC SAFETY EQUIPM	7,775.50
225-4-6125-4309-000	OTHER CONTRACTUAL S	2,530.08
231-4-6131-4309-000	OTHER CONTRACTUAL S	270.00
241-4-6141-4309-000	OTHER CONTRACTUAL S	892.38
241-4-6141-4481-000	IT/COMPUTER EQUIPME	4,171.93

Account Summary

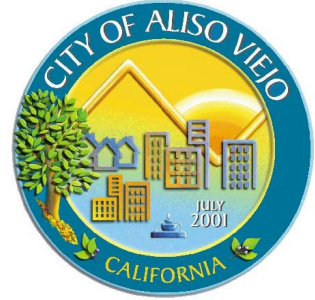
Account Number	Account Name	Payment Amount
251-4-6151-4309-000	OTHER CONTRACTUAL S	10,000.00
261-2103-000	RETENTIONS PAYABLE	-1,208.30
261-4-6161-7301-000	COST OF F&B	1,966.12
261-4-6161-7401-000	EQUIPMENT MAINTENA	2,838.59
261-4-6161-7411-000	UTILITIES	3,537.30
261-4-6161-7421-000	BUILDING & GROUND M	4,428.30
261-4-6161-7425-000	POOL MAINTENANCE	3,028.75
261-4-6161-7431-000	SUPPLIES	828.41
261-4-6161-7432-000	MINOR EQUIPMENT	464.03
261-4-6161-7433-000	OPERATING SUPPLIES	900.35
261-4-6161-7435-000	MERCHANDISE	1,365.57
261-4-6161-7440-000	METINGS/CONFERENCE	325.53
261-4-6161-7445-000	FEES & PERMITS	514.38
261-4-6161-7451-000	MANAGEMENT FEES	12,083.00
311-4-8301-5501-000	DESIGN	3,155.00
Grand Total:		1,628,760.35

Project Account Summary

Project Account Key	Payment Amount
None	1,605,653.94
10014309	270.00
1255501	3,155.00
9014612	340.20
9974570	3,998.76
CDBGCV4309	10,000.00
ENG 2247	603.60
SDP-2022-0004	2,550.00
SDP-2023-00002	378.37
SDP-2023-00005	1,415.24
USE-2023-00012	395.24
Grand Total:	1,628,760.35

City of Aliso Viejo

AGENDA ITEM



DATE: November 1, 2023

TO: Mayor and City Council

FROM: Ann Eifert, Director of Financial Services/City Treasurer

SUBJECT: TREASURER'S STATEMENT – SEPTEMBER 2023

Recommended Action:

Receive and file the September 2023 Treasurer's Statement.

Fiscal Impact:

No Fiscal Impact.

Background:

Per City policy, the Finance Department presents the monthly Treasurer's Statement for the City Council's review. This statement shows the cash balances for the various funds, with a breakdown of bank account balances, investment account balances and the effective yield earned from investments.

Discussion:

The City's portfolio consists of investments in Certificates of Deposits, US Treasuries, US Federal Agencies, Corporate Bonds, and Local Agency Investment Fund (LAIF). All funds invested with LAIF are available for withdrawal within 24 hours.

The Treasurer's Statement provides information regarding the City's investment portfolio and activity during the reporting month. The City's investment portfolio is in compliance with all government codes as well as the City's investment policy. Interest is credited to the City's bank account monthly and allocated among the City's funds. The current portfolio provides sufficient cash flow liquidity to meet the upcoming operating expenses and spending requirements for the next 6 months.

Attachment:

Attachment 1 – September 2023 Treasurer's Statement

CITY OF ALISO VIEJO

TREASURER'S MONTHLY CASH STATEMENT

September 30, 2023

	BEGINNING BALANCE	RECEIPTS	DISBURSEMENTS	TRANSFERS IN (OUT)	ENDING BALANCE
GENERAL FUND	\$ 446,977.88	\$ 3,870,994.03	\$ 2,917,316.41	\$ (11,018.90)	\$ 1,389,636.60
TCRF	\$ 66,853.92				66,853.92
GAS TAX FUND	\$ 895,314.32		73,759.59		821,554.73
MEASURE M	\$ 958,694.39	166,472.56	2,366.00	(1,588.60)	1,121,212.35
SB1-RMRA	\$ 669,701.94	131,997.44		(3,155.00)	798,544.38
PUBLIC SAFETY GRANTS	\$ 160,178.60	102,691.97	1,843.00		261,027.57 ⁽¹⁾
AIR QUALITY IMPRVMT FD	\$ 1,254,580.29				1,254,580.29
INTEGRATED WASTE MGMT FD	\$ 92,529.85		2,530.08		89,999.77
OTHER GRANTS	\$ (178,785.85)		415.00		(179,200.85)
TECHNOLOGY GRANT	\$ 311,801.56		1,148.76		310,652.80
DEVELOPMENT IMPACT	\$ 1,349,361.63	28,415.70			1,377,777.33
FEDERAL GRANTS	\$ (41,475.62)	22,884.41	3,891.00	(6,193.50)	(28,675.71)
CITY FACILITY - AV CTR	\$ 179,758.92				179,758.92
CITY FACILITY - AQUATIC CTR	\$ 49,695.64	72,663.95	82,280.57		40,079.02
STREET IMPROVEMENTS	\$ 51,071.50		54,549.50	3,478.00	- ⁽²⁾
CAPITAL IMPROVEMENTS	\$ (18,478.00)			18,478.00	- ⁽²⁾
STORM WATER	\$ -				- ⁽²⁾
COP CAPITAL	\$ -				- ⁽²⁾
COP	\$ (1,500.00)				(1,500.00)
AV RANCH FOUNDATION	\$ 100.00				100.00
CFD 2005-01	\$ (1,004.00)	2,943.28	3,789.28		(1,850.00)
RENEWABLE FARMS	\$ 2,699.52				2,699.52
COMMUNITY TRUST	\$ 5,562.68				5,562.68
TOTALS	\$ 6,253,639.17	\$ 4,399,063.34	\$ 3,143,889.19	\$ -	\$ 7,508,813.32

SUMMARY OF CASH:

DEMAND DEPOSITS:	GENERAL ACCOUNT	\$ 806,161.16
SAVINGS ACCOUNT:	MONEY MARKET	\$ 26,040.60
INVESTMENTS:	LOCAL AGENCY INVESTMENT FD	\$ 6,676,611.56

TOTAL CASH

\$ 7,508,813.32

Years to Maturity for September 2023

1.45

Weighted Average Yield for September 2023

3.510%

All investments are placed in accordance with the City of Aliso Viejo's Investment Policy.

The above summary provides sufficient cash flow liquidity to meet the next six month's estimated expenditures.

Other monies held include Cash with Fiscal Agent, Investments, Payroll and AV Center.

\$ 35,560,402.83

Cash With Fiscal Agent	COPS/CFD 2005-01	3,392,054.01
Cash With Investment Advisor	City Investments	30,294,358.54
AV Center		1,659,512.66
PR Account		211,719.24
Petty Cash		2,758.38

GRAND TOTAL OF CITY FUNDS

\$ 43,069,216.15

(1) Public Safety Grant includes the MDC and PVS Program Costs budgeted with SLESF funds.

(2) Transfers in and out are done on a quarterly basis.

Street Improvements include the Slurry Seal, Traffic Management and Street Improvement Projects.

Capital Improvements include City Hall, AV Ranch, and other city facilities.

Storm Water includes the Dairy Fork and Wood Canyon Emergent Wetland Project.

Portfolio Summary

City of Aliso Viejo

September 30, 2023

Investments	Par Value	Market Value	Book Value	% of Portfolio	Days to Maturity	Book YTM
Certificates of Deposit	5,145,000.00	4,859,231.04	5,139,029.35	13.90	640	1.75
Corporate Bonds	1,500,000.00	1,444,846.40	1,496,985.00	4.05	383	1.98
LAIF	6,676,611.56	6,676,611.56	6,676,611.56	18.06	1	3.53
U.S. Agencies	8,935,000.00	8,454,884.19	8,592,395.63	23.24	674	3.58
U.S. Treasuries	15,650,000.00	14,888,787.72	15,065,948.53	40.75	662	4.21
	37,906,611.56	36,324,360.91	36,970,970.08	100.00	531	3.51
Investments						
Total Earnings	September 30 Month Ending		Fiscal Year To Date			
Current Year	79,581.51		215,496.87			
Average Daily Balance	35,856,232.99		36,539,440.92			
Book Rate of Return	2.70%		2.34%			

Holdings Report

City of Aliso Viejo

September 30, 2023

CUSIP	Issuer Coupon Rate	Maturity Date Call Date	Remaining Par Value	Settle Date Book Yield	Original Value Book Value	Mkt Price Mkt YTM	Market Value Accrued Int.	% of Port Gain/Loss	Moody/S&P Fitch	WAM Eff. Dur.
Certificates of Deposit										
27002YEX0	EagleBank 1.550%	03/20/2024	245,000.00	03/20/2020	244,510.00	98.14	240,450.78	0.66%	NR/NR	0.47
				1.60%	244,510.00	6.17%	114.45	-4,059.22	NR	0.47
05465DAK4	Axos Bank 1.650%	03/26/2024	245,000.00	03/26/2020	245,000.00	98.13	240,409.64	0.66%	NR/NR	0.49
				1.65%	245,000.00	6.14%	55.38	-4,590.36	NR	0.49
15118RUV7	Celtic Bank 1.400%	04/17/2024	245,000.00	04/17/2020	245,000.00	97.76	239,511.76	0.66%	NR/NR	0.55
				1.40%	245,000.00	6.14%	131.56	-5,488.25	NR	0.54
32110YPS8	First National Bank of America 1.250%	04/22/2024	245,000.00	04/23/2020	244,522.25	97.62	239,164.05	0.66%	NR/NR	0.56
				1.30%	244,522.25	6.16%	75.51	-5,358.20	NR	0.56
15201QDF1	CenterState Bank 1.200%	04/30/2024	245,000.00	04/30/2020	244,522.25	97.52	238,921.18	0.66%	NR/NR	0.58
				1.25%	244,522.25	6.12%	1,240.44	-5,601.07	NR	0.58
58404DGU9	Medallion Bank 1.200%	04/30/2024	245,000.00	04/30/2020	244,522.25	97.52	238,921.18	0.66%	NR/NR	0.58
				1.25%	244,522.25	6.12%	1,240.44	-5,601.07	NR	0.58
538036JN5	Live Oak Banking 1.650%	08/28/2024	245,000.00	02/28/2020	244,529.60	96.42	236,227.98	0.66%	NR/NR	0.91
				1.69%	244,529.60	5.95%	332.26	-8,301.62	NR	0.90
856285RU7	State Bank of India 2.000%	11/27/2024	245,000.00	12/06/2019	245,000.00	95.90	234,950.53	0.66%	NR/NR	1.16
				2.00%	245,000.00	5.82%	1,704.93	-10,049.47	NR	1.13
61760A4F3	Morgan Stanley Private Bank 1.950%	12/12/2024	245,000.00	12/13/2019	244,416.90	95.70	234,475.78	0.66%	NR/NR	1.20
				2.00%	244,416.90	5.80%	1,452.88	-9,941.12	NR	1.18
61690UUJ7	Morgan Stanley Bank 1.800%	02/27/2025	245,000.00	02/28/2020	244,416.90	94.81	232,275.77	0.66%	NR/NR	1.41
				1.85%	244,416.90	5.77%	422.88	-12,141.13	NR	1.39
14042RPG0	Capital One Bank NA 1.600%	04/08/2025	245,000.00	04/09/2020	244,412.00	94.17	230,712.50	0.66%	NR/NR	1.52
				1.65%	244,412.00	5.73%	1,868.71	-13,699.50	NR	1.49
33847E3J4	Flagstar Bank 0.900%	05/15/2025	245,000.00	05/15/2020	245,000.00	92.72	227,170.81	0.66%	NR/NR	1.62
				0.90%	245,000.00	5.76%	839.71	-17,829.19	NR	1.61
866264DP6	Summit State Bank 0.850%	05/15/2025	245,000.00	05/18/2020	244,402.20	92.65	226,982.34	0.66%	NR/NR	1.62
				0.90%	244,402.20	5.76%	793.06	-17,419.86	NR	1.61
89235MJS1	Toyota Financial Savings Bank 0.800%	06/30/2025	245,000.00	06/30/2020	245,000.00	92.05	225,524.82	0.66%	NR/NR	1.75
				0.73%	245,000.00	5.73%	504.77	-19,475.18	NR	1.73
59013KLQ7	Merrick Bank 0.550%	12/30/2025	245,000.00	12/30/2020	245,000.00	89.46	219,166.40	0.66%	NR/NR	2.25
				0.55%	245,000.00	5.64%	118.14	-25,833.60	NR	2.23
02007GXG3	Ally Bank 3.450%	08/04/2026	245,000.00	08/04/2022	245,000.00	94.83	232,335.57	0.66%	NR/NR	2.85
				3.45%	245,000.00	5.41%	1,343.14	-12,664.43	NR	2.68
90348JR93	UBS Bank USA 0.950%	08/11/2026	245,000.00	08/11/2021	245,000.00	88.14	215,951.01	0.66%	NR/NR	2.87
				0.95%	245,000.00	5.50%	127.53	-29,048.99	NR	2.82
38149MYB3	Goldman Sachs Bank 1.000%	08/11/2026	245,000.00	08/11/2021	245,000.00	88.36	216,490.64	0.66%	NR/NR	2.87
				1.00%	245,000.00	5.49%	342.33	-28,509.36	NR	2.82
254673N44	Discover Bank 3.500%	07/29/2027	245,000.00	08/03/2022	245,000.00	93.90	230,044.34	0.66%	NR/NR	3.83
				3.50%	245,000.00	5.22%	1,503.56	-14,955.66	NR	3.54

Holdings Report

City of Aliso Viejo

September 30, 2023

CUSIP	Issuer Coupon Rate	Maturity Date Call Date	Remaining Par Value	Settle Date Book Yield	Original Value Book Value	Mkt Price Mkt YTM	Market Value Accrued Int.	% of Port Gain/Loss	Moody/S&P Fitch	WAM Eff. Dur.
Certificates of Deposit										
87164XN93	Synchrony Bank 3.500%	08/05/2027	245,000.00	08/05/2022	245,000.00	93.88	229,999.83	0.66%	NR/NR	3.85
				3.50%	245,000.00	5.22%	1,339.11	-15,000.17	NR	3.56
02589ADQ2	American Express National Bank 3.450%	08/10/2027	245,000.00	08/12/2022	243,775.00	93.69	229,544.14	0.66%	NR/NR	3.86
				3.56%	243,775.00	5.22%	1,204.19	-14,230.86	NR	3.57
					5,139,029.35		4,859,231.04	13.90%		1.75
Total Certificates of Deposit			5,145,000.00	1.75%	5,139,029.35	5.76%	16,754.98	-279,798.31		1.69
Corporate Bonds										
30231GBC5	Exxon Mobil 2.019%	08/16/2024	500,000.00	12/12/2019	501,615.00	97.10	485,504.55	1.36%	Aa2/AA-	0.88
				07/16/2024	1.95%	501,615.00	5.86%	1,261.88	-16,110.46	NR
037833DM9	Apple 1.800%	09/11/2024	500,000.00	12/06/2019	497,165.00	96.58	482,903.24	1.34%	Aaa/AA+	0.95
				08/11/2024	1.92%	497,165.00	5.65%	500.00	-14,261.76	NR
64952WDL4	New York Life 2.000%	01/22/2025	500,000.00	01/22/2020	498,205.00	95.29	476,438.62	1.35%	Aaa/AA+	1.32
				2.08%	498,205.00	5.82%	1,916.67	-21,766.39	AAA	1.25
					1,496,985.00		1,444,846.40	4.05%		1.05
Total Corporate Bonds			1,500,000.00	1.98%	1,496,985.00	5.77%	3,678.55	-52,138.61		1.00
LAIF										
9830007	LAIF 3.534%	10/01/2023	6,676,611.56	09/28/2023	6,676,611.56	1.00	6,676,611.56	18.06%	NR/NR	0.00
				3.53%	6,676,611.56	3.53%	0.00	0.00	NR	0.00
					6,676,611.56		6,676,611.56	18.06%		0.00
Total LAIF			6,676,611.56	3.53%	6,676,611.56	3.53%	0.00	0.00		0.00
U.S. Agencies										
313384MN6	FHLB 0.000%	10/04/2023	1,000,000.00	05/30/2023	981,796.67	99.93	999,275.53	2.66%	P-1/A-1+	0.01
				5.26%	981,796.67	45.37%	0.00	17,478.86	F1+	0.01
3130A3VC5	FHLB 2.250%	12/08/2023	500,000.00	02/20/2020	514,900.00	99.36	496,783.00	1.39%	Aaa/AA+	0.19
				1.44%	514,900.00	7.24%	3,531.25	-18,117.00	AAA	0.18
313384RQ4	FHLB 0.000%	01/10/2024	1,700,000.00	03/13/2023	1,627,742.91	98.53	1,675,088.73	4.40%	P-1/A-1+	0.28
				5.27%	1,627,742.91	6.82%	0.00	47,345.82	F1+	0.28
3133ELNEO	FFCB 1.430%	02/14/2024	500,000.00	02/14/2020	499,245.00	98.42	492,124.49	1.35%	Aaa/AA+	0.38
				1.47%	499,245.00	6.51%	933.47	-7,120.51	AAA	0.36

Holdings Report

City of Aliso Viejo

September 30, 2023

CUSIP	Issuer Coupon Rate	Maturity Date Call Date	Remaining Par Value	Settle Date Book Yield	Original Value Book Value	Mkt Price Mkt YTM	Market Value Accrued Int.	% of Port Gain/Loss	Moody/S&P Fitch	WAM Eff. Dur.
U.S. Agencies										
3133ELG99	FFCB	06/10/2024	500,000.00	06/10/2020	498,220.00	96.50	482,519.00	1.35%	Aaa/AA+	0.70
	0.375%			0.46%	498,220.00	6.23%	578.12	-15,701.01	AAA	0.67
3133ELCP7	FFCB	12/03/2024	235,000.00	12/09/2019	233,926.05	95.70	224,899.51	0.63%	Aaa/AA+	1.18
	1.625%			1.72%	233,926.05	5.58%	1,251.70	-9,026.54	AAA	1.13
3137EAEX3	FHLMC	09/23/2025	500,000.00	10/20/2020	497,505.00	91.07	455,354.27	1.35%	Aaa/AA+	1.98
	0.375%			0.48%	497,505.00	5.15%	41.67	-42,150.74	AAA	1.92
3130AK5J1	FHLB	09/18/2026 10/06/2023	1,000,000.00	02/16/2023	872,060.00	87.75	877,475.23	2.36%	Aaa/AA+	2.97
	0.700%			4.61%	872,060.00	4.86%	252.78	5,415.23	AAA	2.85
3130ASD63	FHLB	06/28/2027 06/28/2024	1,000,000.00	06/28/2022	1,000,000.00	93.73	937,318.56	2.70%	Aaa/AA+	3.75
	3.250%			3.25%	1,000,000.00	4.89%	8,395.83	-62,681.44	AAA	3.29
3133EPAU9	FFCB	07/14/2027	1,000,000.00	02/16/2023	990,390.00	96.54	965,389.80	2.68%	Aaa/AA+	3.79
	3.875%			4.12%	990,390.00	4.49%	8,288.19	-25,000.20	AAA	3.42
3136G4X99	FNMA	08/25/2027 08/25/2024	1,000,000.00	04/06/2023	876,610.00	84.87	848,656.08	2.37%	Aaa/AA+	3.90
	0.740%			3.82%	876,610.00	4.87%	740.00	-27,953.92	AAA	3.73
					8,592,395.63		8,454,884.19	23.24%		1.85
Total U.S. Agencies			8,935,000.00	3.58%	8,592,395.63	10.18%	24,013.01	-137,511.45		1.71
U.S. Treasuries										
912828T91	U.S. Treasury	10/31/2023	500,000.00	12/09/2019	500,175.78	99.67	498,368.25	1.35%	Aaa/AA+	0.08
	1.625%			1.62%	500,175.78	9.37%	3,400.14	-1,807.53	AAA	0.08
912797HJ9	U.S. Treasury	11/07/2023	1,000,000.00	08/09/2023	986,874.50	99.43	994,274.40	2.67%	P-1/A-1+	0.10
	0.000%			5.41%	986,874.50	9.69%	0.00	7,399.90	F1+	0.11
912797FU6	U.S. Treasury	12/14/2023	500,000.00	08/14/2023	491,122.98	98.88	494,403.62	1.33%	P-1/A-1+	0.21
	0.000%			5.42%	491,122.98	5.65%	0.00	3,280.65	F1+	0.21
912797FU6	U.S. Treasury	12/14/2023	2,000,000.00	09/27/2023	1,977,054.56	98.88	1,977,614.48	5.35%	P-1/A-1+	0.21
	0.000%			5.45%	1,977,054.56	5.65%	0.00	559.92	F1+	0.21
912828YM6	U.S. Treasury	10/31/2024	1,500,000.00	08/09/2023	1,434,316.41	95.86	1,437,832.04	3.88%	Aaa/AA+	1.09
	1.500%			5.23%	1,434,316.41	5.61%	9,415.76	3,515.63	AAA	1.04
91282CEY3	U.S. Treasury	07/15/2025	1,000,000.00	05/30/2023	973,437.50	96.30	963,007.81	2.63%	Aaa/AA+	1.79
	3.000%			4.32%	973,437.50	5.05%	6,358.70	-10,429.69	AAA	1.69
91282CFE6	U.S. Treasury	08/15/2025	1,000,000.00	01/13/2023	980,078.13	96.43	964,257.81	2.65%	Aaa/AA+	1.88
	3.125%			3.94%	980,078.13	5.00%	3,991.17	-15,820.32	AAA	1.78
91282CFP1	U.S. Treasury	10/15/2025	1,000,000.00	05/30/2023	1,000,625.00	98.37	983,710.94	2.71%	Aaa/AA+	2.04
	4.250%			4.22%	1,000,625.00	4.87%	19,624.32	-16,914.06	AAA	1.88
912828M56	U.S. Treasury	11/15/2025	1,000,000.00	05/30/2023	955,117.19	94.41	944,062.50	2.58%	Aaa/AA+	2.13
	2.250%			4.19%	955,117.19	4.92%	8,498.64	-11,054.69	AAA	2.01

Holdings Report

City of Aliso Viejo

September 30, 2023

CUSIP	Issuer Coupon Rate	Maturity Date Call Date	Remaining Par Value	Settle Date Book Yield	Original Value Book Value	Mkt Price Mkt YTM	Market Value Accrued Int.	% of Port Gain/Loss	Moody/S&P Fitch	WAM Eff. Dur.
U.S. Treasuries										
91282CGL9	U.S. Treasury 4.000%	02/15/2026	1,000,000.00	05/30/2023	997,578.13	97.81	978,085.94	2.70%	Aaa/AA+	2.38
				4.09%	997,578.13	4.74%	5,108.70	-19,492.19	AAA	2.22
91282CCF6	U.S. Treasury 0.750%	05/31/2026	1,000,000.00	06/13/2022	915,976.56	89.70	897,031.25	2.48%	Aaa/AA+	2.67
				3.01%	915,976.56	4.75%	2,520.49	-18,945.31	AAA	2.56
91282CCJ8	U.S. Treasury 0.875%	06/30/2026	1,000,000.00	06/29/2022	913,125.00	89.88	898,750.00	2.47%	Aaa/AA+	2.75
				3.20%	913,125.00	4.67%	2,211.28	-14,375.00	AAA	2.64
91282CCP4	U.S. Treasury 0.625%	07/31/2026	1,100,000.00	01/13/2023	987,292.97	88.90	977,882.82	2.67%	Aaa/AA+	2.84
				3.73%	987,292.97	4.69%	1,158.29	-9,410.15	AAA	2.73
912828X88	U.S. Treasury 2.375%	05/15/2027	1,000,000.00	06/29/2022	962,851.56	92.11	921,093.75	2.60%	Aaa/AA+	3.62
				3.20%	962,851.56	4.51%	8,970.79	-41,757.81	AAA	3.35
9128282R0	U.S. Treasury 2.250%	08/15/2027	1,050,000.00	01/13/2023	990,322.27	91.28	958,412.11	2.68%	Aaa/AA+	3.88
				3.60%	990,322.27	4.46%	3,017.32	-31,910.16	AAA	3.61
					15,065,948.53		14,888,787.72	40.75%		1.81
Total U.S. Treasuries			15,650,000.00	4.21%	15,065,948.53	5.47%	74,275.60	-177,160.81		1.71
					36,970,970.08		36,324,360.91	100.00%		1.45
TOTAL PORTFOLIO			37,906,611.56	3.51%	36,970,970.08	6.26%	118,722.14	-646,609.18		1.37
TOTAL MARKET VALUE PLUS ACCRUED INTEREST							36,443,083.05			

Transaction Report

City of Aliso Viejo

September 01, 2023 - September 30, 2023

Transaction Date	Transaction Type	Security ID	Security Description	Maturity Date	Purchases	Redemptions	Interest	Deposits	Withdrawals
09/01/2023	Interest	538036JN5	LIVOAK 1.65 08/28/24	08/28/2024	-	-	343.34	-	-
09/11/2023	Interest	90348JR93	UBS 0.95 08/11/26	08/11/2026	-	-	197.68	-	-
09/11/2023	Interest	037833DM9	AAPL 1.8 09/11/24	09/11/2024	-	-	4,500.00	-	-
09/12/2023	Maturity	313384LQ0	FHLB DISCOUNT NT	09/12/2023	-	1,000,000.00	-	-	-
09/18/2023	Interest	15118RUV7	CELTIC 1.4 04/17/24	04/17/2024	-	-	291.32	-	-
09/18/2023	Interest	3130AK5J1	FHLB 0.7 09/18/26	09/18/2026	-	-	3,500.00	-	-
09/20/2023	Interest	27002YEX0	EGBN 1.55 03/20/24	03/20/2024	-	-	322.53	-	-
09/21/2023	Maturity	313384LZ0	FHLB DISCOUNT NT	09/21/2023	-	500,000.00	-	-	-
09/21/2023	Maturity	912796CR8	TREASURY BILL	09/21/2023	-	1,500,000.00	-	-	-
09/22/2023	Interest	32110YPS8	FNAMER 1 1/4 04/22/24	04/22/2024	-	-	260.10	-	-
09/25/2023	Interest	3137EAEX3	FHLMC 0 3/8 09/23/25	09/23/2025	-	-	937.50	-	-
09/26/2023	Interest	05465DAK4	BOFI 1.65 03/26/24	03/26/2024	-	-	343.34	-	-
09/27/2023	Purchase	912797FU6	TREASURY BILL	12/14/2023	-1,977,054.57	-	-	-	-
09/28/2023	Deposit		LAIF Deposit		-	-	-	1,200,000.00	-
Grand Total:					-1,977,054.57	3,000,000.00	10,695.81	1,200,000.00	0.00

California State Treasurer
Fiona Ma, CPA



Local Agency Investment Fund
P.O. Box 942809
Sacramento, CA 94209-0001
(916) 653-3001

October 10, 2023

[LAIF Home](#)
[PMIA Average Monthly Yields](#)

CITY OF ALISO VIEJO

DIRECTOR OF FINANCIAL SVCS/ CITY TREAS
12 JOURNEY, #100
ALISO VIEJO, CA 92656

[Tran Type Definitions](#)



Account Number: 98-30-007

September 2023 Statement

Effective Date	Transaction Date	Tran Type	Confirm Number	Web Confirm Number	Authorized Caller	Amount
9/28/2023	9/28/2023	RD	1739059	1699451	ANN EIFERT	1,200,000.00

Account Summary

Total Deposit:	1,200,000.00	Beginning Balance:	5,476,611.56
Total Withdrawal:	0.00	Ending Balance:	6,676,611.56



PMIA/LAIF Performance Report as of 10/11/23



Quarterly Performance Quarter Ended 06/30/23

LAIF Apportionment Rate ⁽²⁾ :	3.15
LAIF Earnings Ratio ⁽²⁾ :	0.00008636172883763
LAIF Administrative Cost ^{(1)*} :	0.06
LAIF Fair Value Factor ⁽¹⁾ :	0.984828499
PMIA Daily ⁽¹⁾ :	3.26
PMIA Quarter to Date ⁽¹⁾ :	3.01
PMIA Average Life ⁽¹⁾ :	260

PMIA Average Monthly Effective Yields⁽¹⁾

September	3.534
August	3.434
July	3.305**
June	3.167
May	2.993
April	2.870

Pooled Money Investment Account Monthly Portfolio Composition ⁽¹⁾ 08/31/23 \$168.1 billion

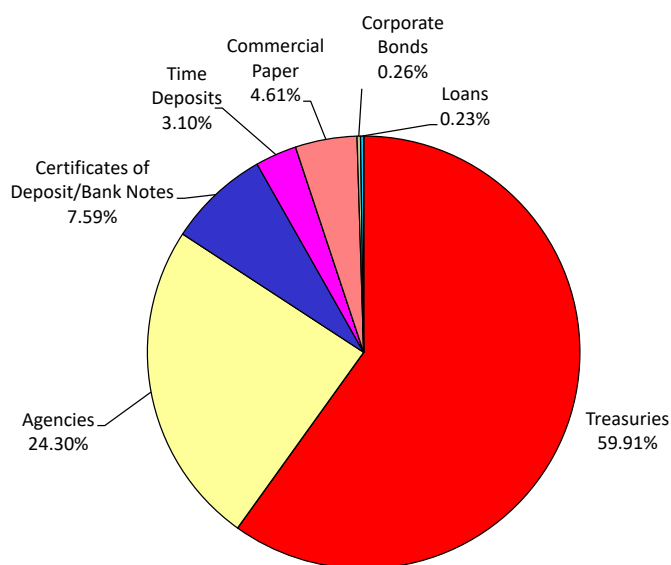


Chart does not include \$2,496,000.00 in mortgages, which equates to 0.002%. Percentages may not total 100% due to rounding.

Daily rates are now available here. [View PMIA Daily Rates](#)

Notes: The apportionment rate includes interest earned on the CalPERS Supplemental Pension Payment pursuant to Government Code 20825 (c)(1) and interest earned on the Wildfire Fund loan pursuant to Public Utility Code 3288 (a).

*The percentage of administrative cost equals the total administrative cost divided by the quarterly interest earnings. The law provides that administrative costs are not to exceed 5% of quarterly EARNINGS of the fund. However, if the 13-week Daily Treasury Bill Rate on the last day of the fiscal year is below 1%, then administrative costs shall not exceed 8% of quarterly EARNINGS of the fund for the subsequent fiscal year.

** Revised

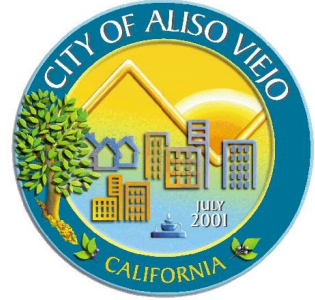
Source:

⁽¹⁾ State of California, Office of the Treasurer

⁽²⁾ State of California, Office of the Controller

City of Aliso Viejo

AGENDA ITEM



DATE: November 1, 2023

TO: Mayor and City Council

FROM: Ann Eifert, Director of Financial Services/City Treasurer
Rose Rivera, Senior Planner

SUBJECT: PROPERTY ACQUISITION – 89 PLAYA CIRCLE

Recommended Actions:

1. Authorize the City Manager to execute a purchase and sale agreement in a form acceptable to the City Attorney for 89 Playa Circle, #R, Aliso Viejo, CA 92656 in an amount not to exceed \$180,000 and direct the City Manager to take all necessary steps to secure title to the property;
2. Find that the purchase of the property is exempt from the California Environmental Quality Act pursuant to State CEQA Guidelines Sections 15301 (Existing Facilities);
3. Authorize the appropriation of Community Development Block Grant funds in the amount of \$245,000 to the Fiscal Year 2023-24 budget for the purchase, loan payoff, due diligence, associated closing costs, and necessary repairs for the property; and
4. Find that the purchase of the property is in conformance with the City's General Plan.

Fiscal Impact:

Concurrently with its consideration of this item on tonight's agenda, the Council will consider approval of an amendment to the FY 2023-2027 Consolidated Plan and the FY 2023-2024 Annual Action Plan for the use of Community Development Grant Block (CDBG) funds wherein staff proposes to reallocate \$245,000 in Community Development Grant Block (CDBG) funds in order to acquire the affordable housing unit at 89 Playa Circle, #R, satisfy all outstanding liens and encumbrances on the property and provide for any necessary repairs.

The purchase price of the property, inclusive of payment to the Aliso Viejo Community Association ("AVCA"), payoff of the existing loan, and any associated closing costs is approximately \$180,000. The exact cost of necessary repairs to the property will be determined later after completion of a formal inspection. However, based on an informal inspection conducted by staff, these costs are not estimated to exceed \$60,000. There

will be ongoing annual costs including maintenance and homeowners' association dues, which will be funded by the General Fund.

Background:

On August 16, 2023, the Council authorized staff to make an offer up to a maximum of \$200,000 in order to purchase a fee simple interest in the property located at 89 Playa Circle, #R, in the City of Aliso Viejo. The property was recently foreclosed by the Aliso Viejo Community Association following a default action against the prior owner.

The City possesses a superior lien on the property recorded in 2015. The affordable housing loan used to originally purchase the property established a 45-year affordability period restricting transfers of the property to qualified, low-income purchasers at an affordable housing cost. Upon resale to another qualified, low-income purchaser, the 45-year affordability period resets. The Association agrees that these covenants, conditions, and restrictions are binding and applicable to AVCA as the present owner of the property.

The City's offer to purchase the property from AVCA includes payment of AVCA's outstanding encumbrances on the property not to exceed \$20,000, as well as satisfaction of all other liens and encumbrances on the property in an amount not to exceed \$143,655. This is subject to execution of a purchase and sale agreement in a form approved by the City and contingent upon the issuance of a title insurance policy in the City's favor.

Discussion:

AVCA has accepted the City's offer providing for payment of \$20,000 as well as satisfaction of a mortgage lien payoff demand to Citibank in the amount of \$143,655, for a total purchase price of \$163,655. This is contingent on obtaining a title insurance policy in the City's favor from Orange Coast Title Company. The purchase cost, lien payoff, associated closing costs, and repairs do not exceed \$245,000. Funds from CDBG and General Funds will be used to fund the project.

General Plan Conformance

In accordance with Section 65402 of the California Government Code, property acquisitions by the City must be determined to conform to the adopted General Plan. The acquisition is found to conform with the following goals and policies of the City's General Plan:

Goal H-1 Encourage a diversity of housing types and provide affordability levels within Aliso Viejo to meet the needs of community residents.

Policy H-1.1 Identify sites appropriate for the development of a variety of housing types and price ranges to meet the needs of all socioeconomic segments of the community through the disbursement of affordable units in projects.

Goal H-2 Create safe and aesthetically pleasing neighborhoods, and provide adequate housing to meet the needs of all household types and income groups.

Goal H-3 Ensure that all persons and household types have equal access to housing.

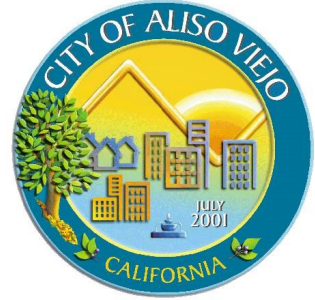
The goals and policies of the Housing Element of the General Plan as identified above address the need to provide opportunities for a variety of housing, maintain housing units that meet the needs of all income groups, and assist special needs households. The purchase of this property will allow the City to maintain affordable housing which is consistent with the overall intent of the Housing Element of the General Plan.

Environmental:

The purchase of the property is exempt from the California Environmental Quality Act pursuant to State CEQA Guidelines Sections 15301 (Existing Facilities).

City of Aliso Viejo

AGENDA ITEM



DATE: November 1, 2023

TO: Mayor and City Council

FROM: Isaac Aziz, IT Manager

SUBJECT: PURCHASE OF SCALE COMPUTING HYPERCONVERGED APPLIANCE
FOR VIRTUALIZATION, STORAGE, BACKUP, AND DISASTER
RECOVERY

Recommended Action:

Approve and authorize the City Manager to purchase Scale Computing Hyperconverged appliance from SHI International to meet the City's virtualization, storage, backup, and disaster recovery needs for an amount not to exceed \$75,000.

Fiscal Impact:

Funds in the total not-to-exceed amount of \$75,000 are included in the FY 2023-24 budget.

Background:

In 2019, the City implemented a hyperconverged on-premises solution, integrating multi-vendor technologies across three servers, switches, and a Storage Area Network (SAN) which has currently reached its end of life (EOL) classification and key components are no longer supported by the manufacturer.

The purchase will bring together virtualization, servers, storage, and backup/disaster recovery into a single solution. It will replicate with City Hall's Scale Computing Hosts to provide disaster recovery for all the City's Servers, improve response times for on-premise servers, and improve security, as well as significantly reduce annual support and maintenance costs. Additionally, a five-year support and licensing was negotiated with the vendor to ensure operational reliability throughout the products lifespan.

Discussion:

City staff obtained quotes for replacement solutions from five vendors. Staff has thoroughly evaluated all quotes. Research included traditional and alternative

technologies from all major hardware vendors in an effort to not only meet the City's current needs, but to ensure the investment will serve its long-range goals as well.

Staff has found that the quote from SHI International best meets the City's current and future needs. If approved, the recommended action would include the acquisition, configuration, and implementation of the Scale Computing Hyperconverged Virtual Appliance solution.

Attachment:

1. Quote from SHI International



Pricing Proposal
Quotation #: 23943155
Created On: 9/14/2023
Valid Until: 11/10/2023

CA-City of Aliso Viejo

Isaac Aziz

12 Journey
Suite 100
Aliso Viejo, CA 92656
United States
Phone: (949) 425-2500
Fax:
Email: iaziz@cityofaliso Viejo.com

Endri Frasheri

Phone:
Fax:
Email: endri_frasheri@shi.com

All Prices are in US Dollar (USD)

Product	Qty	Your Price	Total
1 Scale Computing HE551 Chassis Scale Computing - Part#: CHA-2-15 Contract Name: California Multiple Award Schedule (CMAS) Contract #: 3-23-04-1003	3	\$6,469.56	\$19,408.68
2 Scale Computing PROMO Scale Computing Move powered by Carbonite Migrate Scale Computing - Part#: ADTM-PROMO-20 Contract Name: California Multiple Award Schedule (CMAS) Contract #: 3-23-04-1003	1	\$981.25	\$981.25
3 Scale Computing Intel Xeon E-2388G Scale Computing - Part#: CPU-2-20 Contract Name: California Multiple Award Schedule (CMAS) Contract #: 3-23-04-1003	3	\$0.00	\$0.00
4 Scale Computing 32GB DDR4 ECC UDIMM Scale Computing - Part#: RAM-2-11 Contract Name: California Multiple Award Schedule (CMAS) Contract #: 3-23-04-1003	12	\$0.00	\$0.00
5 Scale Computing 1.92TB 3.5" SATA SSD Scale Computing - Part#: SSD-2-04 Contract Name: California Multiple Award Schedule (CMAS) Contract #: 3-23-04-1003	3	\$0.00	\$0.00
6 Scale Computing 4TB 3.5" SAS HDD Scale Computing - Part#: HDD-2-03 Contract Name: California Multiple Award Schedule (CMAS) Contract #: 3-23-04-1003	9	\$0.00	\$0.00
7 Scale Computing 2-port 10GBASE-T Scale Computing - Part#: NIC-2-0D Contract Name: California Multiple Award Schedule (CMAS) Contract #: 3-23-04-1003	3	\$0.00	\$0.00
8 Scale Computing SC//HyperCore - 8 core 60 Month Standard license and support	3	\$11,765.14	\$35,295.42

software

Scale Computing - Part#: HCOS-S-5-8C

Contract Name: California Multiple Award Schedule (CMAS)

Contract #: 3-23-04-1003

9	Scale Computing 5 Year HW Support for Scale Computing HCI Appliance Scale Computing - Part#: HW-5 Contract Name: California Multiple Award Schedule (CMAS) Contract #: 3-23-04-1003 Coverage Term: – 1/28/2028	1	\$0.00	\$0.00
10	Scale Computing ScaleCare Advanced Installation Services Scale Computing - Part#: QSPI Contract Name: California Multiple Award Schedule (CMAS) Contract #: 3-23-04-1003	1	\$0.00	\$0.00
11	Scale Computing Cisco SX350X-12 Switch Scale Computing - Part#: B12-CSC-10b Contract Name: California Multiple Award Schedule (CMAS) Contract #: 3-23-04-1003	2	\$2,219.68	\$4,439.36
12	Scale Computing SC//HyperCore ScaleCare - Acronis Backup Quickstart Service Scale Computing - Part#: QQCK-ABAU Contract Name: California Multiple Award Schedule (CMAS) Contract #: 3-23-04-1003	1	\$1,378.55	\$1,378.55
13	Scale Computing Acronis Backup Advanced with 5-year Software Maintenance Scale Computing - Part#: ABAU-5Y Contract Name: California Multiple Award Schedule (CMAS) Contract #: 3-23-04-1003	3	\$2,799.33	\$8,397.99
			Subtotal	\$69,901.25
			Total	\$69,901.25

Additional Comments

Please note, if Emergency Connectivity Funds (ECF) will be used to pay for all or part of this quote, please let us know as we will need to ensure compliance with the funding program.

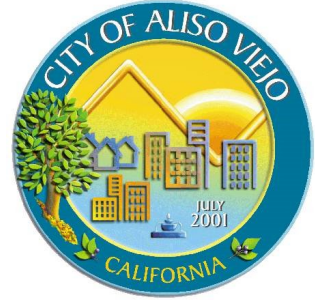
Hardware items on this quote may be updated to reflect changes due to industry wide constraints and fluctuations.

Thank you for choosing SHI International Corp! The pricing offered on this quote proposal is valid through the expiration date listed above. To ensure the best level of service, please provide End User Name, Phone Number, Email Address and applicable Contract Number when submitting a Purchase Order. For any additional information including Hardware, Software and Services Contracts, please contact an SHI Inside Sales Representative at (888) 744-4084. SHI International Corp. is 100% Minority Owned, Woman Owned Business. TAX ID# 22-3009648; DUNS# 61-1429481; CCR# 61-243957G; CAGE 1HTF0

The products offered under this proposal are resold in accordance with the terms and conditions of the Contract referenced under that applicable line item.

City of Aliso Viejo

AGENDA ITEM



DATE: November 1, 2023

TO: Mayor and City Council

FROM: David A. Doyle, City Manager
Patricia Cantonwine, HR Analyst

SUBJECT: CITY COUNCIL DEFERRED COMPENSATION BENEFIT

Recommended Action:

Adopt a Resolution directing monthly benefit allowances for Council Members to be equal to the cash-in-lieu health benefit available to City employees and reduce that amount by the minimum contribution required pursuant to Government Code section 22892(b)(1) for any City Council member that participates in a city offered health insurance plan pursuant to the Public Employees' Medical and Hospital Care Act (PEMHCA).

Fiscal Impact:

There is no fiscal impact associated with the recommended action.

Background:

In June of this year, the City reviewed its benefits program and concluded members of the City Council may receive contributions to a 457(b) deferred compensation plan in lieu of health and welfare benefits pursuant to Government Code section 36516(d) and Opinion No. 05-910 of the California Attorney General.

The proposed resolution further defines the contribution amount will be limited to the monthly benefit allowance amount equal to the value of the cash-in-lieu benefit available to City employees.

Any Council Member participating in a city offered health insurance plan will have their monthly deferred compensation amount reduced by the minimum contribution required pursuant to Government Code section 22892(b)(1), the Public Employees' Medical and Hospital Care Act (PEMHCA). Because the PEMHCA minimum is paid in advance by the city to CalPERS for health premiums and to maintain equal benefits among council members per California State Law, the PEMHCA minimum will be deducted from the monthly deferred compensation amount, retroactively from July 1, 2023.

Attachment:

1. Resolution

RESOLUTION NO. 2023-____

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF ALISO VIEJO, CALIFORNIA, CLARIFYING THE DEFERRED COMPENSATION BENEFIT FOR COUNCIL MEMBERS PURSUANT TO GOVERNMENT CODE SECTION 36516(d)

WHEREAS, the City of Aliso Viejo offers health and welfare benefits, as defined for purposes of Government Code section 36516(d), to eligible employees pursuant to applicable terms and conditions set forth in resolutions, policies, and/or manuals; and

WHEREAS, subject to the satisfaction of applicable requirements, including an election pursuant to the City's cafeteria plan, such employees are eligible to receive cash-in-lieu of health and welfare benefits in an amount determined by resolution of the City Council; and

WHEREAS, members of the City Council are not eligible to receive cash-in-lieu of health and welfare benefits, and may not be given a choice between two or more benefits with different tax implications; and

WHEREAS, members of the City Council may receive contributions to a 457(b) deferred compensation plan in lieu of health and welfare benefits pursuant to Government Code section 36516(d) and Opinion No. 05-910 of the California Attorney General; and

WHEREAS, the City contracts with CalPERS to provide employees and members of the City Council access to group health plans pursuant to the Public Employees' Hospital and Medical Care Act ("PEMHCA"); and

WHEREAS, PEMHCA requires that the City contribution on behalf of those eligible to enroll in a CalPERS health plan, including members of the City Council, be no less than the minimum required under Government Code section 22892(b)(1).

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF ALISO VIEJO AS FOLLOWS:

Section 1: Effective July 1st, members of the City Council shall receive a monthly contribution to the City's 457(b) deferred compensation plan, subject to applicable contribution limitations, equal to the value of the cash-in-lieu benefit available to the City's employees. This amount shall be reduced by the minimum contribution required pursuant to Government Code section 22892(b)(1) for any City Council member that elects to enroll in a health insurance plan offered pursuant to the Public Employees' Medical and Hospital Care Act.

Section 2: The City Clerk shall certify as to the adoption of this Resolution.

PASSED, APPROVED AND ADOPTED this 1st day of November, 2023.

Richard W. Hurt
Mayor

APPROVED AS TO FORM:

ATTEST:

Scott C. Smith, City Attorney

Mitzi Ortiz, MMC, City Clerk

STATE OF CALIFORNIA)
COUNTY OF ORANGE) ss.
CITY OF ALISO VIEJO)

I, MITZI ORTIZ, City Clerk of the City of Aliso Viejo, California, DO HEREBY CERTIFY that the foregoing is the original of Resolution No. 2023-__ duly passed and adopted by the City Council of the City of Aliso Viejo at their regular meeting held on the 1st day of November, 2023, by the following roll call vote, to wit:

AYES:

NOES:

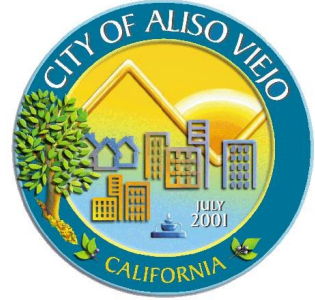
ABSENT:

MITZI ORTIZ, MMC
CITY CLERK

(SEAL)

City of Aliso Viejo

AGENDA ITEM



DATE: November 1, 2023

TO: Mayor and City Council

FROM: So Kim, Community Development Director
Rose Rivera, Senior Planner

SUBJECT: CONSIDERATION OF A SUBSTANTIAL AMENDMENT TO THE 2023-2027 CONSOLIDATION PLAN AND 2023-2024 ANNUAL ACTION PLAN FOR EXPENDITURES OF COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) FUNDS

Recommended Actions:

1. Conduct a public hearing;
2. Declare that the City Council find the amendment to the Fiscal Year ("FY") 2023-2027 Consolidated Plan and the FY 2023-2024 Annual Action Plan is not subject to the California Environmental Quality Act ("CEQA") because the activity is not a project as defined in Section 15378 (b)(5) of the State CEQA Guidelines;
3. Approve and adopt, via minute order, the amendment to the FY 2023-2027 Consolidated Plan and the FY 2023-2024 Annual Action Plan for the use of Community Development Grant Block (CDBG) funds; and
4. Authorize the City Manager to submit the amendment to the Consolidated Plan and Annual Action Plan to the United States Department of Housing and Urban Development ("HUD") and authorize the City Manager to execute and submit all related documents to implement the amended plans.

Fiscal Impact:

The amendment would reallocate \$245,000 from an activity approved in the FY 2023-2024 Annual Action Plan to a new activity.

Background:

The 2023-2027 Consolidated Plan, including the 2023-2024 Annual Action Plan, was approved by the City Council on April 19, 2023. The Annual Action Plan identifies specific activities to be funded by CDBG during a one-year period.

Discussion:

HUD requires that the City substantially amend the FY 2023-2024 Annual Action Plan if CDBG funds are reallocated to an activity not initially listed in the plan. Accordingly, the City is now initiating an amendment to reallocate CDBG funds for the acquisition of an affordable housing unit, as shown in the table below. The subject housing unit is a single-family dwelling, which was constructed with affordable housing resources. The acquisition would preserve the long-term affordability of the unit.

CDBG-Funded Activity	Original CDBG Allocation	Amended CDBG Allocation
ADA Sidewalk Curb Ramps	\$318,288	\$73,288
Housing Acquisition and Rehabilitation	\$0	\$245,000

Environmental:

The proposed action is not a project as defined by the California Environmental Quality Act (CEQA) pursuant to State CEQA Guidelines section 15378(b)(5). The action is an administrative activity of the City that involves a report to a federal agency on the potential utilization of CDBG funds. Thus, the project would not result in any direct or indirect changes to the environment, and consequently, this action is not a project within the meaning of CEQA.

Public Notice:

An 1/8-page public hearing notice was published in the Laguna Niguel News on September 28, 2023 for a 30-day review period, per HUD and local requirements.

City Attorney:

The City Attorney's office reviewed this report.

Attachment:

1. 2023-2027 Consolidated Plan and 2023-2024 Annual Action Plan Amendment (Excerpted)

City of Aliso Viejo

2023-2027 CONSOLIDATED PLAN & FY 2023-2024 ANNUAL
ACTION PLAN

AMENDMENT #1 – NOVEMBER 1, 2023

April 19, 2023

CITY OF ALISO VIEJO | COMMUNITY DEVELOPMENT DEPARTMENT

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Executive Summary

ES-05 Executive Summary - 24 CFR 91.200(c), 91.220(b)

1. Introduction

The 2023-2027 Consolidated Plan for the City of Aliso Viejo satisfies federal requirements to receive Community Development Block Grant (CDBG) funds from the U.S. Department of Housing and Urban Development (HUD). The primary objective of the CDBG program is to develop viable urban communities by providing decent housing, a suitable living environment, and economic opportunities, principally for persons of low- and moderate-income.

CDBG funds are allocated on a formula basis to over 1,200 local and state governments. The CDBG formula is based on variables including current population, projected population growth, age of housing stock, and poverty rate. Each activity to be undertaken with CDBG funds must meet one of the three national objectives:

- Benefit low- and moderate-income persons
- Aid in the prevention or elimination of slums and blight, or
- Meet a community development need having a particular urgency

The City of Aliso Viejo has received CDBG funds from HUD since July 1, 2015. The City contracted with the County of Orange for program administrative services as “Metro City” in the Urban County CDBG program. In May 2017, the City notified HUD and the County of Orange that it would assume full administrative responsibilities for the entire CDBG program beginning July 1, 2018.

The Consolidated Plan identifies an array of goals and activities that the City can implement over a five-year period to address some of the needs identified through an assessment process. The 2023-2027 Consolidated Plan covers the period of July 1, 2023, through June 30, 2028. The Consolidated Plan is prepared utilizing HUD’s **eConPlan Suite**. This online system consists of several templates, which will be electronically submitted to HUD once completed. The templates dictate the Consolidated Plan’s content and allow City staff limited opportunities to expand narratives or modify the format. The template also includes over 60 community profile and housing market data tables. Several tables are prepopulated with data from the U.S. Census Bureau (primarily data from the 2013–2017 American Community Survey or ACS) and HUD’s Comprehensive Housing Affordability Strategy (CHAS). The CHAS is a unique computation of housing and income data generated by the Census Bureau on behalf of HUD. The City’s 2021-2029 Housing Element and other demographic data sources supplement HUD-provided data.

Key Findings

Based on data and information used to prepare the Consolidated Plan, several key findings regarding Aliso Viejo’s housing and community needs include the following:

- Many Aliso Viejo households pay a significant percentage of their income for housing. Specifically, lower-income elderly and small households (i.e., 2 to 4 related members) appear to be the most impacted.
- The City has a good mix of housing unit types by tenure. The City's updated Housing Element has identified land use capacity for 1,195 housing units – the city's share of regional housing for the next nine years.
- The City's public infrastructure and facilities are in good condition; however, some public improvements may require updating, and others may need upgrading to comply with current Americans with Disabilities Act (ADA) regulations.
- Several agencies are available to assist the City's lower-income households and homeless with safety net services; however, the need often exceeds available resources.

The **Action Plan** is the component of the Consolidated Plan that is updated annually. It is the City's one-year expenditure plan for CDBG funds. HUD has notified the City that it will receive \$261,093 in CDBG funds for Fiscal Year 2023-2024 (FY 23-24). Additionally, \$145,520 in prior year uncommitted funding is available for programming during the fiscal year.

The Annual Action Plan details the specific activities the City will undertake with CDBG funds during FY 23-24. Planned activities include public facility improvements (e.g., ADA improvements), **acquisition**, public services, and program administration. In subsequent years, funding for housing activities may be allocated to address some of the broader needs and goals identified in the Consolidated Plan.

2. Summary of the objectives and outcomes identified in the Plan Needs Assessment Overview

The Strategic Plan portion of the Consolidated Plan provides information regarding five-year goals and outcomes. Listed below is a summary of these goals and outcomes:

- Public Infrastructure and Facility Improvements: Approximately 5,000 City residents may benefit from installing or rehabilitating CDBG-funded public infrastructure improvements.
- Housing Preservation: An estimated 10 owner-occupied and one rental unit may be rehabilitated with CDBG-funded program resources.
- Homelessness Prevention (including homeless assistance): An estimated 1,350 individuals assisted with case management, food, rent/utility assistance, and housing
- Public Services: 450 individuals assisted with safety net services
- Program Administration: The City will provide resources to ensure oversight and coordination of the CDBG program.

3. Evaluation of past performance

At the time of the preparation of the 2023-2027 Consolidated Plan, the City of Aliso Viejo has partially completed the final year of the 2018-2022 Consolidated Plan cycle (FY 22-23). **Appendix 1** summarizes

the City's 2018-2023 Consolidated Plan accomplishments through FY 21-22 – the most recently completed fiscal year.

4. Summary of citizen participation process and consultation process

A vital component of the Consolidated Plan is the input of residents and community stakeholders to identify community needs and the activities to address needs. The City encouraged resident participation in a variety of ways:

- Two surveys were used to obtain input from residents, businesses, and service providers regarding community needs. Surveys were available online.
- The City held a community meeting to obtain public input regarding housing goals and needs
- The City used newspaper and webpage notices to publicize public meetings regarding the availability of the draft Consolidated Plan for public review and comment.

5. Summary of public comments

See Appendix 2.

6. Summary of comments or views not accepted and the reasons for not accepting them

See Appendix 2.

7. Summary

The 2023-2027 Consolidated Plan is the second prepared by the City of Aliso Viejo. The City's Planning Department has prepared the Consolidated Plan so the City can continue to receive CDBG funds directly from HUD. The primary objective of the CDBG program is to develop viable urban communities by providing decent housing, a suitable living environment, and economic opportunities for low- and moderate-income persons. Additionally, each activity funded with CDBG funds must meet a national objective.

The 2023-2027 Consolidated Plan will cover the five years of FY 23-24 through FY 27-28. As required by HUD, the Consolidated Plan was prepared utilizing HUD's electronic template. The template includes over 60 community profile and housing market data tables prepopulated with data from HUD.

The 2023-2024 Annual Action Plan is the first for the 2023-2027 Consolidated Plan cycle. The Annual Action Plan is the City's one-year expenditure plan for CDBG funds. The City will receive \$261,093 in CDBG funds for FY 23-24. Additionally, \$145,520 in prior year uncommitted CDBG funds will be available for programming. The Action Plan details the City's CDBG-funded activities during the fiscal year to address community needs that support the broad objectives and goals identified within the Consolidated Plan.

November 2023 Substantial Amendment

On November 1, 2023, the City Council approved a substantial amendment to the FY 2023-2024 Annual Action Plan to reallocate \$245,000 in CDBG for ADA Sidewalk Curb Ramp construction, to acquire and

rehabilitate an attached single-family residential unit to be used as permanent affordable housing for a lower-income household.

The Process

PR-05 Lead & Responsible Agencies 24 CFR 91.200(b)

1. Describe agency/entity responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source

The following agencies/entities are responsible for preparing the Consolidated Plan and administering each grant program and funding source.

Agency Role	Name	Department/Agency
CDBG Administrator	ALISO VIEJO	Community Development

Table 1 – Responsible Agencies

Narrative

The City's Community Development Department is primarily responsible for preparing the Consolidated Plan and administering CDBG funds.

Consolidated Plan Public Contact Information

Ms. Rose Rivera, Senior Planner - Phone: (949) 425-2528 / Fax: (949) 425-3899 / rrivera@avcity.org

PR-10 Consultation – 91.100, 91.110, 91.200(b), 91.300(b), 91.215(I) and 91.315(I)

1. Introduction

The City of Aliso Viejo took several steps to obtain the input of community residents and stakeholders to develop the Consolidated Plan and the 2023-2024 Annual Action Plan. Consultation efforts included disseminating a community needs survey. The City also consulted with state and regional agencies, special districts, and neighboring communities. Additionally, the City utilized its internet webpage, social media, and the local community newspaper to notify residents of the opportunity to review and comment on the draft 2023-2027 Consolidated Plan and 2023-2024 Annual Action Plan. Actions taken by the City are consistent with the City's Citizen Participation Plan, which is incorporated into the Consolidated Plan.

Provide a concise summary of the jurisdiction's activities to enhance coordination between public and assisted housing providers and private and governmental health, mental health and service agencies (91.215(I)).

The City of Aliso Viejo works closely with the County of Orange Housing Authority (OCHA), which assists renter households with HUD-funded housing assistance vouchers and certificates. As housing development opportunities evolve, City staff works closely with developers to explore and create housing opportunities for lower-income residents. It is important to note that Aliso Viejo is a master planned community and is effectively built out. The 2021-2029 Housing Element identifies sites that may be suitable for future housing development; however, no new housing development is likely during FY 23-24.

Through the annual City-funded public service grants allocation process, City staff can ascertain the types of services City residents require (e.g., senior services, youth services) and develop partnerships with local agencies to ensure the delivery of quality services.

Describe coordination with the Continuum of Care and efforts to address the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans, and unaccompanied youth) and persons at risk of homelessness

The Continuum of Care is a regional coordinated resource delivery system for homeless housing and support services. Aliso Viejo supports the Orange County Continuum of Care (OC-CoC) planning process by participating in the regional 2022 homeless Point-In-Time Survey (PITS), which included a homeless census within the community. The City will also continue to allocate non-CDBG funds (e.g., general fund and PLHA) for homeless service providers such as the OC Sheriff, Family Assistance Ministries, and South County Outreach.

As a direct recipient of CDBG funds, the City will continue and expand existing relationships with local CoC service providers to address the needs of the City's homeless and those at risk of becoming homeless and support OC-CoC efforts to address regional homeless issues.

Describe consultation with the Continuum(s) of Care that serves the jurisdiction's area in determining how to allocate ESG funds, develop performance standards and evaluate outcomes, and develop funding, policies and procedures for the administration of HMIS

The City does not receive Emergency Solutions Grant (ESG) funds; therefore, it does not assist the OC-CoC with determining ESG allocations, evaluating outcomes, or developing policies and procedures for administering the regional Homeless Management Information System (HMIS).

2. Describe Agencies, groups, organizations and others who participated in the process and describe the jurisdictions consultations with housing, social service agencies and other entities

Table 2 – Agencies, groups, organizations who participated

1	Agency/Group/Organization	Fair Housing Foundation
	Agency/Group/Organization Type	Service-Fair Housing
	What section of the Plan was addressed by Consultation?	Impediments to Fair Housing Strategy
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	The agency provided data and information that helped identify the needs of households requiring fair housing services - also provided input regarding the City's strategy to address impediments to fair housing.
2	Agency/Group/Organization	211 Orange County
	Agency/Group/Organization Type	Services-homeless Regional organization
	What section of the Plan was addressed by Consultation?	Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth HMIS
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Regional Continuum of Care coordinator and HMIS administrator. They provided important information regarding regional and City homeless populations and shelter resources.
3	Agency/Group/Organization	State of California Department of Housing and Community Development
	Agency/Group/Organization Type	Other government - State
	What section of the Plan was addressed by Consultation?	Lead-based Paint Strategy Economic Development Market Analysis Demographics
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Various State departments and agencies were consulted to obtain information regarding employment, demographics, and lead hazards.
4	Agency/Group/Organization	Orange County Housing Authority
	Agency/Group/Organization Type	PHA

	What section of the Plan was addressed by Consultation?	Housing Need Assessment Homelessness Strategy
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Provided information regarding the number and type of households receiving rental assistance and the number of households requesting housing assistance.
5	Agency/Group/Organization	County of Orange
	Agency/Group/Organization Type	Other government - County
	What section of the Plan was addressed by Consultation?	Lead-based Paint Strategy Economic Development Demographics
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Various county departments and agencies were consulted to obtain information regarding employment, demographics, and lead hazards.
6	Agency/Group/Organization	City of Aliso Viejo
	Agency/Group/Organization Type	Other government - Local
	What section of the Plan was addressed by Consultation?	Housing Need Assessment Homelessness Strategy Non-Homeless Special Needs Market Analysis
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Various City departments and City Council provided data and information. Also played a key role in identifying priorities and recommendations regarding allocating HUD funds.
7	Agency/Group/Organization	Family Assistance Ministries
	Agency/Group/Organization Type	Services-homeless
	What section of the Plan was addressed by Consultation?	Homelessness Strategy Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Helped identify housing and service needs of persons at risk of becoming homeless and those already homeless.

8	Agency/Group/Organization	Laura's House
	Agency/Group/Organization Type	Services-Victims of Domestic Violence
	What section of the Plan was addressed by Consultation?	Non-Homeless Special Needs
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	The agency helped identify the needs of homeless women and women with children, including victims of domestic violence.
9	Agency/Group/Organization	Age Well Senior Services
	Agency/Group/Organization Type	Services-Elderly Persons
	What section of the Plan was addressed by Consultation?	Non-Homeless Special Needs
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	The agency helped identify the needs of senior and frail elderly persons and households.
10	Agency/Group/Organization	South County Outreach
	Agency/Group/Organization Type	Services-homeless
	What section of the Plan was addressed by Consultation?	Homelessness Strategy Homeless Needs - Families with children Anti-poverty Strategy
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	Helped identify housing and service needs of persons at risk of becoming homeless and those already homeless.
11	Agency/Group/Organization	Council On Aging - Orange County
	Agency/Group/Organization Type	Services-Elderly Persons
	What section of the Plan was addressed by Consultation?	Non-Homeless Special Needs
	How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?	The agency helped identify the needs of senior and frail elderly persons and households.

Identify any Agency Types not consulted and provide rationale for not consulting

The City had an open consultation process; no agency was prevented or excluded from participating.

Other local/regional/state/federal planning efforts considered when preparing the Plan

Name of Plan	Lead Organization	How do the goals of your Strategic Plan overlap with the goals of each plan?
Continuum of Care	Orange County 211	Helped the City analyze the needs of Aliso Viejo homeless. Includes regional and local 2022 Point-In-Time Survey and Plan to End Homelessness (including Discharge Plan)
City of Aliso Viejo Housing Element	City of Aliso Viejo	Provided housing priorities and program goals
City of Aliso Viejo 5 Yr. Capital Improvement Plan	City of Aliso Viejo	Multi-year capital improvement plan helped identify priority capital projects that may be CDBG-eligible
Economic Development Analysis & Strategy	City of Aliso Viejo	Identified City economic strengths and weaknesses and provided a recommended strategy to close gaps
5 Yr. & 1 Yr. PHA Plan	Orange County Housing Authority	Identified OCHA resources to address the housing needs of lower-income renter householders in the City
Analysis of Impediments to Fair Housing	Orange County	A multi-jurisdictional document identified fair housing impediments within participating cities and outlined a plan to address impediments

Table 3 – Other local / regional / federal planning efforts

Describe cooperation and coordination with other public entities, including the State and any adjacent units of general local government, in the implementation of the Consolidated Plan (91.215(l))

The City consulted with state agencies to obtain updated housing and population information. Additionally, the City contacted various County of Orange agencies to obtain data on children with elevated lead blood levels, the number of households receiving rental assistance, homeless count, and other regional plans. Local governments also assisted the City with the preparation of the Consolidated Plan. As the current recipient of Housing Opportunities for Persons with AIDS (HOPWA) funds, Aliso Viejo consulted with the City of Anaheim regarding Aliso Viejo residents living with HIV and AIDS and available HOPWA program resources. The City also participated in roundtable meetings with other Orange County CDBG recipients to discuss regional housing and community needs.

Narrative (optional):

PR-15 Citizen Participation – 91.105, 91.115, 91.200(c) and 91.300(c)

1. Summary of citizen participation process/Efforts made to broaden citizen participation Summarize citizen participation process and how it impacted goal-setting

The City implemented the following efforts to obtain a broad range of resident input to prepare the Consolidated Plan and Action Plan:

Housing & Community Needs Survey: Electronic and hard copy survey instruments were used to obtain public input regarding priority housing and community needs. The surveys were publicized and accessible via social media (e.g., Twitter and Facebook) and the City’s website. Hard copies of the survey were also available at City Hall, the Aliso Viejo Community Center, and the Aliso Viejo Ranch. The survey was available to the public from January 23, 2023, through February 14, 2023. Summary survey results are incorporated into the Consolidated Plan as **Appendix 2**.

Community Workshop: Numerous Housing Element community meetings were held to obtain public input regarding housing needs and activities to meet the City’s future housing needs.

Notices/Website: All public notices were published in local newspapers of general circulation (*Aliso Viejo News*). The draft Consolidated Plan and Action Plan were also posted on the City’s website for public review and comment. Hard copies were available during the required 30-day public comment period (see **Appendix 2**).

November 2023 Substantial Amendment

A notice was published announcing a 30-day comment period to receive public comments regarding the proposed Action Plan amendment.

Public Hearings: Consistent with HUD’s regulations, the City Council held a public hearing at a regularly noticed and scheduled meeting (April 19, 2023) to obtain public input regarding the draft Consolidated Plan and the proposed use of 2023-2024 CDBG funds, and to authorize staff to submit the document to HUD.

November 2023 Substantial Amendment

A public hearing was held on November 1, 2023, to receive additional public comments regarding the proposed Action Plan amendment.

Citizen Participation Outreach

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (If applicable)
1	Housing Needs Survey	Non-targeted/broad community	Survey to solicit input regarding housing needs (May 2021)	111 surveys were collected - 96% self-identified as residents (See Appendix 2)	NA	www.avcity.org
2	Public Meeting	Non-targeted/broad community	5/19/21 City Council Study Session, 6/5/21 Farmers Market Booth, 8/18/21 City Council Meeting & 1/12/22 public workshop regarding Housing Element update	See Appendix 2	None	NA
3	Public Hearing	Non-targeted/broad community	1/16/22 Housing Element Public Hearing	No public comments were received	None	NA
4	Housing & Community Needs Survey	Non-targeted/broad community	Survey to solicit input regarding housing and community needs (February 2023)	38 surveys were collected – 95% self-identified as residents (See Appendix 2)	NA	www.avcity.org
5	Newspaper Ad	Non-targeted/broad community	30-day public comment period and public hearing notice	See Appendix 2	None	NA

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (If applicable)
6	Public Hearing	Non-targeted/broad community	4/19/23 public hearing to approve 2023-2027 Con Plan and 2023-2024 Action Plan and to authorize submission of the plans to HUD	See Appendix 2	None	NA
7	Newspaper Ad	Non-targeted/broad community	30-day public comment period and public hearing notice	See Appendix 2	TBD	TBD
8	Public Hearing	Non-targeted/broad community	11/1/23 public hearing to approve an amendment to the 2023-2024 Action Plan and to authorize submission of the plans to HUD	See Appendix 2	TBD	TBD

Table 4 – Citizen Participation Outreach

Needs Assessment

NA-05 Overview

Needs Assessment Overview

HUD has provided the City with extensive data to assess the housing needs of Aliso Viejo residents. By default, HUD data is based on the 5-Year American Community Survey (ACS) data for 2013 through 2017, which the U.S. Census Bureau generates. Updated information is used to the extent that data is available.

Data to be assessed in this section of the Consolidated Plan include the following:

- Household demographics including population, number of households, and the number of households experiencing “housing problems”
- The extent to which housing problems are experienced disproportionately by one or more racial or ethnic groups
- Public housing – **NOTE, THE CITY DOES NOT OWN OR MANAGE PUBLIC HOUSING**
- An assessment of homeless needs, including an estimated number of sheltered and unsheltered individuals
- The City’s “Non-housing Community Development Needs,” such as public facilities, infrastructure, and social service needs

HUD’s housing needs estimates are based on an assessment of Census data of households experiencing one or more “housing problems.” Per HUD, a household is experiencing a housing problem if its residential unit is subject to 1 or more of the following conditions:

1. Lack of a complete kitchen facility
2. Lack of complete plumbing facilities
3. * *Cost burdened*: More than 30% of a household’s total gross income is spent on housing costs. For renters, housing costs include rent paid by the tenant plus utilities; housing costs include mortgage payment, taxes, insurance, and utilities for owners.
* *Severely Cost Burden*: More than 50% of a household’s total gross income is spent on housing costs. For renters, housing costs include rent paid by the tenant plus utilities; housing costs include mortgage payment, taxes, insurance, and utilities for owners.
4. * *Overcrowded*: Defined as a housing unit with 1.01 to 1.5 persons per room, excluding bathrooms, porches, foyers, halls, or half-rooms.
* *Severely Overcrowded*: Defined as housing with more than 1.51 persons per room, excluding bathrooms, porches, foyers, halls, or half-rooms.

It is important to note that in the context of the Consolidated Plan, crowding is defined by HUD, which is a different standard than the State of California’s housing unit occupancy standard, which is the standard that the City is required to enforce.

HUD data also characterizes households by types:

- Small Related: Household with 2 to 4 related members
- Large Related: Household with 5 or more related members
- Elderly: Household whose head, spouse, or sole member is at least 62 years of age
- Other: All other households

HUD defines a household as “All the people who occupy a housing unit. A household includes the related family members and all the unrelated people, if any, such as lodgers, foster children, wards, or employees who share the housing unit. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.”

HUD Income Categories

Finally, HUD categorizes households by income:

- Extremely low-income: A household with an income equal to 0% to 30% of the Area Median Income (AMI)
- Very low-income: A household with an income equal to 30% to 50% of the AMI
- Low-income: A household with an income equal to 50% to 80% of the AMI
- Low- and moderate-income: A household with an income less than 80% of AMI
- Moderate-income: A household with income equal to 80% to 100% of AMI

HUD updates income limits on an annual basis.

NA-10 Housing Needs Assessment - 24 CFR 91.205 (a,b,c)

Summary of Housing Needs

The original Aliso Viejo Planned Community, which comprises most of the City, began development in the early 1980s. Residential portions of the planned community reached build-out soon after the City's incorporation in July 2001.

According to U.S. Census Bureau data presented in **Table 5**, the City's population grew by 23% between 2009 and 2017. The number of households in the City grew – by 17% for the same period. Data from the U.S. Census reports the City's current population at 51,943, comprising 18,999 households (2021 *American Community Survey (ACS) 5-Year Table DP05*). According to the California Department of Finance, as of January 2022, the City's population is 50,782 (*California Department of Finance, Demographic Research Unit Table 2E-5*).

Aliso Viejo's median household income grew by 12% between 2009 and 2017, according to **Table 5**. According to the U.S. Census, Aliso Viejo's 2021 household median income is \$122,320 (2021 ACS 5-Year Table S1903).

Demographics	Base Year: 2009	Most Recent Year: 2017	% Change
Population	41,077	50,690	23%
Households	15,934	18,660	17%
Median Income	\$94,917.00	\$106,353.00	12%

Table 5 - Housing Needs Assessment Demographics

Data Source: 2000 Census (Base Year), 2013-2017 ACS (Most Recent Year)

Number of Households Table

	0-30% HAMFI	>30-50% HAMFI	>50-80% HAMFI	>80-100% HAMFI	>100% HAMFI
Total Households	1,480	1,195	2,500	2,050	11,435
Small Family Households	480	550	1,175	960	6,685
Large Family Households	40	70	145	190	985
Household contains at least one person 62-74 years of age	315	195	480	325	1,630
Household contains at least one person age 75 or older	254	175	200	145	335
Households with one or more children 6 years old or younger	170	75	320	330	2,360

Table 6 - Total Households Table

Data Source: 2013-2017 CHAS

Housing Needs Summary Tables

1. Housing Problems (Households with one of the listed needs)

	Renter					Owner				
	0-30% AMI	>30- 50% AMI	>50- 80% AMI	>80- 100% AMI	Total	0-30% AMI	>30- 50% AMI	>50- 80% AMI	>80- 100% AMI	Total
NUMBER OF HOUSEHOLDS										
Substandard Housing - Lacking complete plumbing or kitchen facilities	15	40	15	20	90	10	0	0	15	25
Severely Overcrowded - With >1.51 people per room (and complete kitchen and plumbing)	0	30	10	4	44	0	0	20	0	20
Overcrowded - With 1.01-1.5 people per room (and none of the above problems)	25	0	65	25	115	0	30	45	0	75
Housing cost burden greater than 50% of income (and none of the above problems)	655	580	260	60	1,555	415	160	350	125	1,050
Housing cost burden greater than 30% of income (and none of the above problems)	40	125	790	550	1,505	30	45	395	515	985
Zero/negative Income (and none of the above problems)	70	0	0	0	70	150	0	0	0	150

Table 7 – Housing Problems Table

Data Source: 2013-2017 CHAS

2. Housing Problems 2 (Households with one or more Severe Housing Problems: Lacks kitchen or complete plumbing, severe overcrowding, severe cost burden)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
NUMBER OF HOUSEHOLDS										
Having 1 or more of four housing problems	695	650	350	110	1,805	425	190	420	140	1,175
Having none of four housing problems	95	205	935	885	2,120	50	155	795	915	1,915
Household has negative income, but none of the other housing problems	70	0	0	0	70	150	0	0	0	150

Table 8 – Housing Problems 2

Data Source: 2013-2017 CHAS

3. Cost Burden > 30%

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
NUMBER OF HOUSEHOLDS								
Small Related	215	355	565	1,135	185	135	385	705
Large Related	20	35	40	95	15	15	49	79
Elderly	305	195	155	655	150	40	200	390
Other	185	185	350	720	105	40	130	275
Total need by income	725	770	1,110	2,605	455	230	764	1,449

Table 9 – Cost Burden > 30%

Data Source: 2013-2017 CHAS

4. Cost Burden > 50%

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
NUMBER OF HOUSEHOLDS								
Small Related	195	285	75	555	175	115	180	470
Large Related	20	35	0	55	15	15	4	34
Elderly	305	195	75	575	130	10	110	250
Other	170	130	105	405	105	40	60	205
Total need by income	690	645	255	1,590	425	180	354	959

Table 10 – Cost Burden > 50%

Data Source: 2013-2017 CHAS

5. Crowding (More than one person per room)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
NUMBER OF HOUSEHOLDS										
Single family households	25	30	55	29	139	0	30	49	0	79
Multiple, unrelated family households	0	0	20	0	20	0	0	15	0	15
Other, non-family households	0	0	0	0	0	0	0	0	0	0
Total need by income	25	30	75	29	159	0	30	64	0	94

Table 11 – Crowding Information – 1/2

Data Source: 2013-2017 CHAS

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
Households with Children Present								

Table 12 – Crowding Information – 2/2

Data Source

Comments: Table is populated with HUD-provided data.

Describe the number and type of single person households in need of housing assistance.

According to the U.S. Census Bureau, there are 4,756 one-person households in Aliso Viejo (2021 ACS - Year Estimate Table S2501). HUD's Consolidated Plan tables do not provide data regarding one-person households experiencing housing problems. However, Table 7 shows few Aliso Viejo households live in housing units with incomplete plumbing or kitchen facilities; by definition, one-person households do not live in overcrowded housing. According to HUD's 2013-2017 CHAS data (Table 21), 20.9% of all Aliso Viejo households are cost-burdened, and 14.5% are severely cost-burdened. Assuming one-person households are experiencing housing problems in the same proportion as the City as a whole, 994 one-person households are housing cost burdened, and 690 are severely housing cost burdened.

Estimate the number and type of families in need of housing assistance who are disabled or victims of domestic violence, dating violence, sexual assault and stalking.

According to the U.S. Census Bureau (2021 ACS -Year Estimate Table S1810), 3,217 Aliso Viejo residents live with a disability. Over one-third of residents with disabilities age 18 and older have difficulty living independently. The Census Bureau also reports that approximately 8% of Aliso Viejo residents with a disability have an income below the poverty level (2021 ACS -Year Estimate Table C18130).

According to the State of California Attorney General’s Office, in 2021, there were 76 calls for assistance related to domestic violence in Aliso Viejo. No statistics regarding dating violence or stalking are available. Orange County has a well-established network of domestic violence shelter and service providers. These agencies offer emergency, transitional, and permanent housing options for victims of domestic violence.

What are the most common housing problems?

According to data from **Table 7**, substandard housing due to a lack of complete plumbing or kitchen facilities is not a significant issue (only 115 units are identified with this type of housing problem). Similarly, crowding is not a significant issue in the community – per **Table 11**, 253 housing units meet HUD’s definition of a crowded housing unit. Based on data from **Tables 9** and **10**, housing cost burden is the most prevalent housing issue. Based on HUD data, 21.7% of Aliso Viejo households are cost burdened; 13.7% are severely cost-burdened.

Are any populations/household types more affected than others by these problems?

As indicated above, a cost-related housing problem is prevalent among low- and moderate-income households. Based on HUD data from **Table 9**, approximately 45.4% of small related lower-income households are housing cost burdened; 25.8% of lower-income elderly households are also experiencing housing cost burden. Per **Table 10**, 40.2% of lower-income small-related households are severely housing cost burdened – 32.4% of lower-income elderly households also experience severe housing cost burden.

Describe the characteristics and needs of Low-income individuals and families with children (especially extremely low-income) who are currently housed but are at imminent risk of either residing in shelters or becoming unsheltered 91.205(c)/91.305(c)). Also discuss the needs of formerly homeless families and individuals who are receiving rapid re-housing assistance and are nearing the termination of that assistance

According to information from The Kennedy Commission (an Orange County-based nonprofit that advances housing solutions for very low- and extremely low-incomes households), Orange County is “[r]anked among the top ten least affordable metropolitan areas in the country.” The *2022-2023 Orange County Community Indicators Report* states an annual income of \$157,500 is needed to purchase a typical Orange County “entry-level” home (median price of \$1,071,000). The hourly wage rate required to afford a median-priced one-bedroom rental unit, at \$1,905 per month, is \$36.63 – a minimum wage earner would need to work 98 hours per week to afford this unit. Considering these statistics and HUD’s housing problem tables, it is reasonable to conclude that extremely low-income and very low-income households, including elderly households on fixed incomes, may have difficulties maintaining their current housing situation, considering increasing housing costs and inflation.

For homeless households exiting rapid re-housing programs, local service providers have designed programs to ensure exiting clients have the capacity and tools to sustain self-sufficiency. “Housing

navigators” are adept at finding housing that meets clients' budget limits and is close to work, school, etc. Agency also provides various wrap-around supportive services, including follow-up counseling. However, according to local service providers, finding an affordable housing unit in South Orange County is problematic.

If a jurisdiction provides estimates of the at-risk population(s), it should also include a description of the operational definition of the at-risk group and the methodology used to generate the estimates:

As indicated above, small lower-income, and senior households experiencing severe housing cost burdens are most at risk of becoming homeless. The methodology for estimating the number of households at risk of homelessness is also outlined above.

Specify particular housing characteristics that have been linked with instability and an increased risk of homelessness

According to the Orange County Commission to End Homelessness, people experience homelessness for various reasons. The lack of affordable housing, acute poverty (household income of less than 50% of the federal poverty line), mental illness, and substance addiction are some characteristics of households at risk of homelessness. As evidenced by HUD data, lower-income small related and seniors households are the most vulnerable Aliso Viejo households, primarily due to housing affordability.

Discussion

Based on data provided by HUD, a significant percentage of lower-income Aliso Viejo households are experiencing a housing problem. The most prevalent housing problem is housing cost burden. The issue is most severe among renter and homeowner households with incomes below 50% of the AMI. Recent community assessment data from the County of Orange also indicates that low-income households face significant challenges in finding and maintaining affordable housing. The risk of homelessness is also impacted by factors such as substance addiction and mental illness.

NA-15 Disproportionately Greater Need: Housing Problems – 91.205 (b)(2)

Introduction

Per HUD, a “disproportionately greater need” exists when the members of a racial or ethnic group at a given income level experience housing problems at a rate at least 10% points greater than the income category as a whole.

Example - Assume that 60% of all low-income households within a jurisdiction have a housing problem and 70% of low-income Hispanic households have a housing problem. In this case, low-income Hispanic households have a disproportionately greater need.

The **four housing problems** are:

1. Lack of complete kitchen facilities
2. Lack of complete plumbing facilities
3. More than one person per room, excluding bathrooms, porches, foyers, halls or half-rooms, or
4. Cost burden greater than 30%

The following tables identify the number and extent of housing problems by income level and race/ethnicity (based on HUD-provided data).

0%-30% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	1,185	75	220
White	735	70	185
Black / African American	40	0	0
Asian	220	10	35
American Indian, Alaska Native	0	0	0
Pacific Islander	0	0	0
Hispanic	165	0	0

Table 13 - Disproportionally Greater Need 0 - 30% AMI

Data Source: 2013-2017 CHAS

*The four housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%

30%-50% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	1,010	195	0
White	635	120	0
Black / African American	100	0	0
Asian	110	25	0
American Indian, Alaska Native	0	20	0
Pacific Islander	0	0	0
Hispanic	145	25	0

Table 14 - Disproportionally Greater Need 30 - 50% AMI

Data Source: 2013-2017 CHAS

*The four housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%

50%-80% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	1,955	545	0
White	1,295	295	0
Black / African American	0	35	0
Asian	235	115	0
American Indian, Alaska Native	30	0	0
Pacific Islander	0	0	0
Hispanic	305	40	0

Table 15 - Disproportionally Greater Need 50 - 80% AMI

Data Source: 2013-2017 CHAS

*The four housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%

80%-100% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	1,315	735	0
White	950	465	0
Black / African American	0	15	0
Asian	120	85	0
American Indian, Alaska Native	0	0	0
Pacific Islander	0	0	0
Hispanic	225	170	0

Table 16 - Disproportionally Greater Need 80 - 100% AMI

Data Source: 2013-2017 CHAS

*The four housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%

Discussion

HUD data from **Tables 13** through **16** indicate that many Aliso Viejo households are experiencing some housing problems.

Based on data from **Table 13**, most extremely low-income households are experiencing one or more housing problems; however, extremely low-income Black/African American and Hispanic households are disproportionately impacted. Among very low-income households (**Table 14**), Black/African American households are disproportionately impacted by housing problems. For households with low -income (50% to 80% AMI), HUD data indicates that Black/African American and Hispanic households are disproportionately experiencing housing problems (**Table 15**). Finally, according to HUD's data, among households with incomes between 80% and 100% AMI, no race or ethnic groups are disproportionately experiencing a housing problem (**Table 16**).

NA-20 Disproportionately Greater Need: Severe Housing Problems–91.205 (b)(2)

Introduction

As indicated above, per HUD, a “disproportionately greater need” exists when the members of a racial or ethnic group at a given income level experience housing problems at a rate at least 10% greater than the income category as a whole. **Tables 17** through **20** provide data regarding Aliso Viejo households experiencing **severe** housing problems, that is, housing units that lack a complete kitchen facility or plumbing facilities, households who pay more than 50% of total household gross income for housing, or a housing unit with more than 1.51 persons per room.

0%-30% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	1,120	145	220
White	700	105	185
Black / African American	20	20	0
Asian	220	10	35
American Indian, Alaska Native	0	0	0
Pacific Islander	0	0	0
Hispanic	155	10	0

Table 17 – Severe Housing Problems 0 - 30% AMI

Data Source: 2013-2017 CHAS

*The four severe housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%

30%-50% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	840	360	0
White	550	205	0
Black / African American	100	0	0
Asian	85	45	0
American Indian, Alaska Native	0	20	0
Pacific Islander	0	0	0
Hispanic	85	85	0

Table 18 – Severe Housing Problems 30 - 50% AMI

Data Source: 2013-2017 CHAS

*The four severe housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%

50%-80% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	770	1,730	0
White	590	1,000	0
Black / African American	0	35	0
Asian	60	290	0
American Indian, Alaska Native	10	20	0
Pacific Islander	0	0	0
Hispanic	90	250	0

Table 19 – Severe Housing Problems 50 - 80% AMI

Data Source: 2013-2017 CHAS

*The four severe housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%

80%-100% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	250	1,800	0
White	165	1,250	0
Black / African American	0	15	0
Asian	35	170	0
American Indian, Alaska Native	0	0	0
Pacific Islander	0	0	0
Hispanic	50	345	0

Table 20 – Severe Housing Problems 80 - 100% AMI

Data Source: 2013-2017 CHAS

*The four severe housing problems are: 1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%

Discussion

HUD data from **Tables 17** through **20** indicate that several lower-income Aliso Viejo households are experiencing severe housing problems.

Among households with extremely low-income (**Table 17**), Asian and Hispanic populations are disproportionately experiencing severe housing problems. Among very low-income households (**Table 18**), only Black/African American households are reported to be disproportionately impacted by severe housing problems. For households with low income (50% to 80% AMI), HUD data indicates that no

particular group of race/ethnic households is disproportionately experiencing severe housing problems (**Table 19**). Similarly, according to HUD’s data, among households with incomes between 80% and 100% AMI (**Table 20**), no one category of race/ethnic households is disproportionately experiencing a severe housing problem.

NA-25 Disproportionately Greater Need: Housing Cost Burdens – 91.205 (b)(2)

Introduction:

As outlined in the previous sections, a “disproportionately greater need” (as defined by HUD) exists when the members of a racial or ethnic group at a given income category experience housing problems at a greater rate (i.e., 10% points) than the income level as a whole. The previous tables evaluated disproportionality for all four housing problems by income and race/ethnicity. Data for **Table 21** is solely for housing cost burden.

Housing Cost Burden

Housing Cost Burden	<=30%	30-50%	>50%	No / negative income (not computed)
Jurisdiction as a whole	11,720	3,865	2,860	220
White	7,890	2,505	2,010	185
Black / African American	145	30	115	0
Asian	1,860	460	365	35
American Indian, Alaska Native	60	20	10	0
Pacific Islander	0	0	0	0
Hispanic	1,410	725	305	0

Table 21 – Greater Need: Housing Cost Burdens AMI

Data Source: 2013-2017 CHAS

Discussion:

Based on the data provided by HUD in **Table 21**, Black/African Americans with incomes over 50% of AMI are experiencing a disproportionately greater housing cost burden; however, it is important to note that several cohorts trend close to the disproportionate need threshold (e.g., extremely low-income American/Alaskan Natives, and very low-income Hispanics).

NA-30 Disproportionately Greater Need: Discussion – 91.205(b)(2)

Are there any Income categories in which a racial or ethnic group has disproportionately greater need than the needs of that income category as a whole?

HUD data does show varying degrees of housing problems among Aliso Viejo residents regardless of race or ethnicity. The data indicate that Black/African American, American Indian/Alaska Native, and Hispanic households are experiencing disproportionate housing needs. The data also suggest that Asian, Black/African American, and Hispanic households are experiencing disproportionate severe housing needs. HUD data also suggests housing cost is the prevalent problem among all races/ethnic categories, especially among extremely low-income households.

If they have needs not identified above, what are those needs?

For households experiencing one of the four housing problems, rental assistance, housing rehabilitation assistance, and certain social services (e.g., safety net services) may provide households with additional resources to afford or maintain decent housing.

Are any of those racial or ethnic groups located in specific areas or neighborhoods in your community?

Asians and Hispanics comprise the community's most prominent minority populations – 16.3% and 18.9%, respectively. Per HUD's CPDMaps program, the City's Asian population lives throughout the community. The Census Tract with the highest concentration of Asian residents is 0626.38, with 21.12% Asian residents. The Census Tract with the largest concentration of Hispanics is Census Tract 0423.20, with nearly a third of residents (28.7%) identified as of "Hispanic Origin. (Note: this Census Tract is shared with two neighboring jurisdictions.). See **Appendix 3 – Map A** and **Map B**.

CPDMaps also identifies three Census Tracts with a high concentration of housing cost burden. Over 45.75% of residents living in these Census Tracts pay more than 30% of their income for housing (**Appendix 3 – Map C**). CPDMaps data shows that 48.19% of residents of Census Tract 0423.20 are experiencing a housing cost burden – this is the same Census Tract with the largest concentration of Hispanic residents.

NA-35 Public Housing – 91.205(b)

Introduction

Aliso Viejo does not operate a HUD-funded public housing authority - the City partners with the Orange County Housing Authority (OCHA). The information provided in **Table 22** through **Table 25** is for all Orange County communities served by OCHA; however, based on consultation with OCHA, as of February 2023, 161 Aliso Viejo households are receiving HUD-funded rental assistance, including four households receiving Veterans Affairs Supportive Housing (VASH) assistance, four Continuum of Care Voucher (homeless), and four households participating in the Emergency Voucher Program (COVID-relief). Other information regarding Aliso Viejo rental assistance program participants includes the following:

- 131 are White, 17 African American/Black, 10 Asian, and three multi-racial - 24 are ethnically Hispanic/Latino
- 80 households have at least one disabled household member
- 98 households have at least one household member that is age 62 or older
- 17 households were homeless at the time of admission into the program
- 7 households are Veteran households
- Average household income is \$20,991
- The average household size is two (1.7 persons)
- 67.7% of program participants have received OCHA rental assistance for over five years

Totals in Use

	Program Type								
	Certificate	Mod-Rehab	Public Housing	Vouchers					
				Total	Project-based	Tenant - based	Special Purpose Voucher		
							Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
# of units vouchers in use	0	0	0	10,825	0	10,418	187	207	10

Table 22 - Public Housing by Program Type

***includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition**

Data Source: PIC (PIH Information Center)

Characteristics of Residents

	Program Type							
	Certificate	Mod-Rehab	Public Housing	Vouchers				
				Total	Project-based	Tenant-based	Special Purpose Voucher	
							Veterans Affairs Supportive Housing	Family Unification Program
Average Annual Income	0	0	0	16,476	0	16,470	17,239	15,594
Average length of stay	0	0	0	8	0	8	0	4
Average Household size	0	0	0	2	0	2	1	3
# Homeless at admission	0	0	0	87	0	5	72	10
# of Elderly Program Participants (>62)	0	0	0	4,926	0	4,884	38	3
# of Disabled Families	0	0	0	2,163	0	2,075	64	14
# of Families requesting accessibility features	0	0	0	10,825	0	10,418	187	207
# of HIV/AIDS program participants	0	0	0	0	0	0	0	0
# of DV victims	0	0	0	0	0	0	0	0

Table 23 – Characteristics of Public Housing Residents by Program Type

Data Source: PIC (PIH Information Center)

Race of Residents

Race	Program Type								
	Certificate	Mod-Rehab	Public Housing	Vouchers					
				Total	Project-based	Tenant-based	Special Purpose Voucher		
							Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
White	0	0	0	5,857	0	5,528	139	182	6
Black/African American	0	0	0	745	0	693	39	10	2
Asian	0	0	0	4,128	0	4,107	4	15	2
American Indian/Alaska Native	0	0	0	64	0	60	4	0	0

Program Type									
Race	Certificate	Mod-Rehab	Public Housing	Vouchers					
				Total	Project-based	Tenant-based	Special Purpose Voucher		
							Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
Pacific Islander	0	0	0	31	0	30	1	0	0
Other	0	0	0	0	0	0	0	0	0
*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition									

Table 24 – Race of Public Housing Residents by Program Type

Data Source: PIC (PIH Information Center)

Ethnicity of Residents

Program Type									
Ethnicity	Certificate	Mod-Rehab	Public Housing	Vouchers					
				Total	Project-based	Tenant-based	Special Purpose Voucher		
							Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
Hispanic	0	0	0	1,941	0	1,814	34	87	4
Not Hispanic	0	0	0	8,884	0	8,604	153	120	6
*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition									

Table 25 – Ethnicity of Public Housing Residents by Program Type

Data Source: PIC (PIH Information Center)

Section 504 Needs Assessment: Describe the needs of public housing tenants and applicants on the waiting list for accessible units:

Not applicable

Most immediate needs of residents of Public Housing and Housing Choice voucher holders

Not applicable

How do these needs compare to the housing needs of the population at large

Not applicable

Discussion

As indicated, the City of Aliso Viejo does not own or manage public housing. OCHA serves city residents. Based on data provided by OCHA, as of February 2023, 161 households are receiving housing assistance. OCHA has also provided data indicating that as of February 2023, six Aliso Viejo households are on the housing assistance waitlist. It is important to note that during the past year, OCHA has purged its waitlist in preparation for opening a new waitlist – it has been over five years since OCHA last opened the waitlist.

The City will continue to work with OCHA as necessary. These efforts include consultation as part of preparing the City's Consolidated Plan and annual Action Plans and assisting OCHA with preparing and certifying their Public Housing Authority (PHA) Plan.

NA-40 Homeless Needs Assessment – 91.205(c)

Introduction:

Homeless researchers typically use one of two methods to measure homelessness. One method attempts to count all persons that are literally homeless on a given day/week (point-in-time count). The second examines the number of people who are homeless over a given period - period prevalence count. The Orange County Continuum of Care (OC-CoC) uses the first method for the biennial enumeration of the region's homeless.

The most recent Point-In-Time Survey (PITS) of the region's homeless was conducted in February 2022. All Orange County cities, including Aliso Viejo, were invited to contribute and participate. The survey identified 13 unsheltered and four sheltered homeless individuals in Aliso Viejo. To address some of the narratives below, estimates will be based on the assumption that the City's homeless population mirrors the region's homeless population.

Homeless Needs Assessment

Population	Estimate the # of persons experiencing homelessness on a given night		Estimate the # experiencing homelessness each year	Estimate the # becoming homeless each year	Estimate the # exiting homelessness each year	Estimate the # of days persons experience homelessness
	Sheltered	Unsheltered				
Persons in Households with Adult(s) and Child(ren)	4	0	0	0	0	0
Persons in Households with Only Children	0	0	0	0	0	0
Persons in Households with Only Adults	0	13	0	0	0	0
Chronically Homeless Individuals	0	8	0	0	0	0
Chronically Homeless Families	0	0	0	0	0	0
Veterans	0	1	0	0	0	0
Unaccompanied Child	0	0	0	0	0	0
Persons with HIV	0	1	0	0	0	0

Table 26 - Homeless Needs Assessment

Data Source Comments: Additional table information was also not provided by Point-In-Time Survey.

Indicate if the homeless population is: Has No Rural Homeless

If data is not available for the categories "number of persons becoming and exiting homelessness each year," and "number of days that persons experience homelessness," describe these categories for each homeless population type (including chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth):

As indicated above, the 2022 PITS identified 17 homeless individuals in Aliso Viejo – 0.3% of the County’s total homeless population identified in the PITS (2.9% of the homeless in the South Service Planning Area (SPA)). Demographic data for these 17 individuals is limited. Assuming the Aliso Viejo homeless population mirrors the County, the following demographic information is provided:

- Gender: 9 males and 8 females
- Age: 2 under age 18, 5 age 25-39, 4 age 40-49, 2 age 50-54, 3 age 55-61, and 1 age 62 plus
- Race: 2 Black/African American, 12 White, 3 Multi-racial
- Ethnicity: 6 Hispanic and 11 non-Hispanic

Chronic Homeless: A chronically homeless individual is an unaccompanied individual (living in an emergency shelter or unsheltered) with a disabling condition which has been continuously homeless for a year or more or has had at least 4 episodes of homelessness in the past 3 years. The 2022 PITS estimates that 48.2% of the County’s homeless are chronically homeless. Based on this percentage, it is estimated that eight of Aliso Viejo’s homeless may be chronically homeless.

The 2022 PITS does not provide data regarding the number of chronically homeless families. 2022 homeless data reported to HUD via the OC-CoC HMIS indicates there are 102 “Chronically homeless persons in households with at least one adult and one child” in Orange County – approximately 1.8% of the total County homeless population. Based on this statistic, it appears there are no chronically homeless families with children in Aliso Viejo.

Families with Children: The 2022 PITS does not provide information regarding homeless families in Aliso Viejo. The PITS does report that approximately 21% of the region’s homeless are “families.” Applying this factor to the City’s homeless population, four of the City’s homeless population are likely members of a family. OCHA waitlist data is often a good indicator of the number of homeless families with children needing shelter. Data provided by OCHA indicates no homeless families are presently waiting for federal rental assistance. The OC-CoC typically

prioritizes housing resources for homeless families with children; consequently, it is not unreasonable that there is a relatively low number of homeless families with children in Aliso Viejo.

Veterans & their Families: The County’s 2022 PITS indicates approximately 4.9% of the region’s homeless are veterans; however, HUD’s 2022 *Annual Homelessness Assessment Report to Congress* indicates that nationwide, 33,129 veterans were experiencing homeless – approximately 7% of all adults experiencing homelessness. Applying these percentages to Aliso Viejo’s homeless population, it is estimated there is one homeless veteran in the City. This same HUD report indicates “nearly all veterans were experiencing homelessness as individuals.” Based on this finding, assuming no homeless veterans with families in the City is reasonable. OCHA reports that four Aliso Viejo households receive rental assistance via the VASH program (a veterans housing/services program). Three of these households are formerly homeless - two are veteran households with at least one child.

Unaccompanied Youth: The regional 2022 PITS indicates 4.1% of the region’s homeless are Transitional Age Youth (age 18 to 24). Based on this data, it is reasonable to assume that Aliso Viejo has zero or one unaccompanied homeless youth.

HIV/AIDS: The 2022 PITS estimated that 2.6% of homeless adults have HIV/AIDS, indicating that zero or one homeless individual in Aliso Viejo has HIV/AIDS.

Nature and Extent of Homelessness: (Optional)

Race:	Sheltered:	Unsheltered (optional)
White	3	9
Black or African American	1	3
Asian	0	0
American Indian or Alaska Native	0	0
Pacific Islander	0	0
Multi-racial	0	1
Ethnicity:	Sheltered:	Unsheltered (optional)
Hispanic	2	4
Not Hispanic	2	9

Data Source

Comments:

211-Orange County

Estimate the number and type of families in need of housing assistance for families with children and the families of veterans.

As outlined previously, OCHA has provided the City with information regarding Aliso Viejo households that receive rental assistance and that are on the assisted housing waitlist. As of February 2022, six Aliso Viejo households are on the waitlist for housing assistance – all are one-person households. One applicant reports zero income; the others report minimal income. Four of the six applicants are age 62 plus, which is consistent with observations from the 2022 PITS – an increase in the number of homeless seniors. The 2022 PITS indicates 12.6% of the County’s homeless are seniors (9.8% among unsheltered homeless and 15.7% among sheltered homeless).

Per the U.S. Census Bureau, 4.9% of the City’s population lives below the poverty level, including 7.6% of residents age 65 plus. According to OCHA data, 93 households that receive rental assistance have incomes below the poverty level. Sixteen (16) of these Aliso Viejo households are families with children - two of these families are veteran households. Additionally, 61 households that receive rental assistance are seniors, and 51 are disabled households. Without rent subsidies, many of these households are at risk of homelessness.

Describe the Nature and Extent of Homelessness by Racial and Ethnic Group.

The 2022 PITS provides data on the race and ethnicity of the County’s sheltered and unsheltered homeless. Based on this data, it is likely that 12 of the City’s homeless population is White, two are Black/African American, and three are multi-racial.

Describe the Nature and Extent of Unsheltered and Sheltered Homelessness.

As previously stated, the 2022 PITS reports four sheltered and 13 unsheltered homeless in Aliso Viejo.

Discussion:

The 2022 Point-In-Time Survey of Orange County’s homeless identified 13 unsheltered and four sheltered homeless in Aliso Viejo. Based on regional statistics, nine of the City’s homeless are male, and eight are female. Most Aliso Viejo homeless are between the age of 25 and 49. Approximately 5% of the City’s residents live below the poverty line. Some of these households currently receive federal rental assistance; however, these and other lower-income and special needs populations (e.g., seniors and the disabled) are at risk of homelessness.

NA-45 Non-Homeless Special Needs Assessment - 91.205 (b,d)

Introduction:

HUD requires that the Consolidated Plan include a review of relevant data regarding the housing needs of persons who require special supportive housing but are not homeless. Specific segments of the population, such as the elderly, disabled, victims of domestic violence, and persons with HIV/AIDS, may experience conditions that make it difficult to access suitable affordable housing. Physical or medical conditions, space or supportive service requirements, income, or other factors may impede a household's ability to obtain decent and affordable housing. This section briefly describes the characteristics of these special needs populations in Aliso Viejo.

Describe the characteristics of special needs populations in your community:

Elderly/Frail Elderly. According to the U.S. Census, 5.7% of Aliso Viejo residents are age 65 and over. Issues faced by this population include limited mobility, increased medical attention due to health complications, and fixed income (e.g., Social Security, pension, and retirement income). Many older adults have difficulty completing regular, everyday tasks without assistance. Common service needs for the elderly include public transit, health and nutrition services, and in-home support services.

As detailed in HUD's housing needs tables (**Tables 9 and 10**), 1,045 lower-income elderly households are experiencing a housing cost burden, and 825 are experiencing a severe housing cost burden. OCHA reports that as of February 2023, 92 senior households receive federal rental assistance. OCHA also reports that four senior Aliso Viejo households are presently on the housing assistance waitlist.

Persons with mental, physical, and/or developmental disabilities. According to the 2009-2013 ACS, approximately 6.2% of Aliso Viejo's population has one or more disabilities. Federal laws define a person with a disability as "Any person who has a physical or mental impairment that substantially limits one or more major life activities..." A physical or mental impairment generally includes hearing, mobility, and visual impairments, chronic alcoholism, chronic mental illness, AIDS or AIDS-related medical complication, and mental retardation.

As of February 2022, OCHA provides housing assistance to 80 disabled households – no individuals with a disability are presently on the housing assistance waitlist.

Victims of domestic violence, dating violence, sexual assault, and stalking. Domestic violence is manifested in many forms; willful intimidation, physical assault, sexual assault, and/or other abusive behavior that is part of a systematic pattern of power and control perpetrated by one intimate partner against another. Nationwide it is estimated that one in three women and one in four men experience some form of domestic violence by an intimate partner. The California Department of Justice reports that in 2021, 76 domestic violence calls for assistance were reported in Aliso Viejo. For these individuals and households, temporary safe housing is vital. The 2022 PITS estimates that 855, or 17.1% of homeless adults, were victims of domestic violence. Several housing options are available for victims of

domestic violence; however, the 2022 PITS indicates that 33.8% of these individuals were unsheltered. Based on these statistics, it is estimated three of the City's homeless may be victims of domestic abuse.

Persons with HIV/AIDS and their families. The Orange County Health Care Agency estimated that as of December 31, 2021, 6,772 individuals in Orange County live with HIV, with an additional 950 persons unaware of their HIV status. For Aliso Viejo, the Health Care Agency reports there are “no cases or [the per 100,000 population] rate [is] not calculated.” Persons with HIV/AIDS may face various challenges in obtaining and maintaining stable housing. Access to safe, affordable housing may be as crucial to their general health and well-being as access to quality healthcare. The persistent shortage of stable housing can be a barrier to consistent medical care and treatment. In addition, persons with HIV/AIDS may be targets of discrimination, including illegal eviction from their homes when their illness is exposed. The Fair Housing Amendments Act of 1988 prohibits housing discrimination against persons with disabilities, including persons with HIV/AIDS. As previously reported, the 2022 PITS estimates 2.6% of the County's homeless live with HIV/AIDS – applied to the City's homeless population, it is estimated that zero or one homeless individual may have HIV/AIDS.

What are the housing and supportive service needs of these populations and how are these needs determined?

Elderly/Frail elderly. As people age, their dependency on Social Security and pension programs increases as their primary income sources. According to the Census Bureau, approximately 5.7% of Aliso Viejo's population is age 65 and older. While the elderly may qualify for income through Social Security, this income source may only cover part of the total mortgage or rent cost, leaving little or nothing for food, medical needs, or other necessities. Frail elderly individuals often require specialized in-home services such as food preparation, housekeeping, and personal hygiene assistance. Assisted living facilities generally cost more than the typical housing in the community, which could make it increasingly difficult for this group to afford housing without assistance. Senior advocates, such as Age Well Senior Services and Council on Aging – Southern California, provided the City with information regarding the service needs of the community's seniors. Regionally, the County's Office on Aging supports various services, including elder abuse prevention and legislative advocacy for all Orange County seniors.

Persons with mental, physical, and/or developmental disabilities. A disability can negatively impact a person's ability to work and earn money. Many disabled people live in households with incomes below the federal poverty level; therefore, access and availability to affordable housing is a crucial issue among persons with disabilities. In addition to affordability, other needs may include supportive services, design features to accommodate physical limitations, and proximity to transit and community amenities.

The Regional Center is a nonprofit organization contracted by the State of California to coordinate lifelong services and support for individuals with developmental disabilities. The Regional Center is the first stop for those seeking local services and support that help individuals with intellectual and physical disabilities live safely and with dignity in the community. Partner agencies provide various services, including housing, self-determination programs, and employment training and placement.

Victims of domestic violence, dating violence, sexual assault, and stalking. Victims of domestic violence need access to safe housing and specialized support services such as legal, mental health, and financial counseling. Several agencies in the County provide these services and advocate on behalf of their clients. During the Consolidated Plan's preparation, the City consulted with Laura's House, one of the County's leading providers of housing and services for domestic violence victims.

Persons with HIV/AIDS and their families. As outlined above, persons with HIV/AIDS may face various barriers to obtaining and maintaining affordable, stable housing. Based on average housing costs, persons with HIV/AIDS could be forced to pay a large portion of their income for healthcare that might otherwise go toward monthly rent or mortgage. HUD has allocated Housing Opportunities for Persons With AIDS (HOPWA) grant funds to the City of Anaheim on behalf of all Orange County cities. Through the consultation process, the City of Anaheim has indicated that on a countywide basis, it will utilize HOPWA resources to fund supportive services (approximately 185 individuals per year) and Tenant Based Rental Assistance (approximately 70 households per year). No specific HOPWA-funded activity is slated for Aliso Viejo.

Discuss the size and characteristics of the population with HIV/AIDS and their families within the Eligible Metropolitan Statistical Area:

The Orange County Health Care Agency estimated that as of December 31, 2021, 6,772 individuals in Orange County living with HIV, with an additional 950 persons unaware of their HIV status. Information regarding the characteristics of County residents identified with HIV in 2021 includes the following:

- Gender: 88.3% male, 9.9% female, and 1.8% other/not identified
- Race/Ethnicity: 52.2% Hispanic, 28.8% White, 12.0% Asian, 5.1% Black, and 1.9% Other/Unknown
- Age at Diagnosis: 2.2% age 0-18, 20.8% age 19-25, 32.5% age 26-35, 18.6% age 36-45, 15.3% age 46-55, and 10.6% age 56 and older
- Mode of Exposure: 68.6% by men having sex with men, 12.4% via heterosexual contact, and 7.3% by injection drug use

Discussion:

Orange County is one of the most expensive housing markets in the nation; therefore, it is not unexpected that many households in Aliso Viejo are experiencing some form of housing problem. Cost burden is the most prevalent housing problem in the City. In addition to the housing challenges many Aliso Viejo households face, special needs populations also face the added burden of affording the services that help maintain their quality of life.

NA-50 Non-Housing Community Development Needs – 91.215 (f)

Describe the jurisdiction's need for Public Facilities:

The City's public facilities are generally in good condition; however, age and federal/state regulations changes may necessitate upgrading. For example, while most City public facilities have been constructed to meet ADA accessibility requirements, recent changes to these regulations may require upgrades to public improvements to comply with current regulations.

How were these needs determined?

The City of Aliso Viejo's Capital Improvement Plan identifies public facilities slated for installation, replacement, or upgrading (including ADA compliance). Public input via the Housing and Community Needs Survey has also been used to identify public facilities that may be considered for CDBG funding.

Describe the jurisdiction's need for Public Improvements:

The City's Capital Improvement Plan identifies resources and appropriations for operating costs, debt service, and maintenance of existing assets, including facilities and infrastructure. Planned improvements generally include the following:

- Public Infrastructure Improvements – reconstruction or rehabilitation of roadway pavement, median improvements, streetscape improvements, stormwater improvements, and wetlands mitigation
- ADA Improvements – curb, sidewalk, and ramp improvements to comply with ADA regulations

How were these needs determined?

The evaluation of public service needs is based on consultation with staff from the City, public agencies, and residents' input via the *Housing & Community Needs Survey*.

Describe the jurisdiction's need for Public Services:

Numerous public, social, and faith-based agencies serve Aliso Viejo's residents. These organizations address residents' social, health, education, and recreational needs. The demand for public and social services typically exceeds available resources, especially for social safety net services.

How were these needs determined?

Community development needs are evaluated by consultation with City staff, public agencies, nonprofit service providers, and residents (via *Housing and Community Needs Survey*).

Housing Market Analysis

MA-05 Overview

Housing Market Analysis Overview:

The Market Analysis aims to provide a picture of the environment in which Aliso Viejo administers its CDBG programs over the term of the Consolidated Plan. The Market Analysis includes the following information:

- Number of housing units, cost of housing, and the condition of housing
- Public and assisted housing
- Homeless facilities and services
- Special needs facilities and services
- Barriers to affordable housing
- Non-housing community development assets

In conjunction with the Needs Assessment, the Market Analysis provides the basis for the Strategic Plan and the programs and projects to be undertaken with CDBG funds. Most of the data tables in this section of the Consolidated Plan are populated by default with data from HUD's Comprehensive Housing Affordability Strategy (CHAS.). These are datasets developed by the Census Bureau for HUD based on 2013-2017 ACS data. Other data sources are noted throughout the Plan. The housing analysis will also examine barriers to affordable housing, including impediments to fair housing choice.

MA-10 Number of Housing Units – 91.210(a)&(b)(2)

Introduction

Aliso Viejo's housing stock is primarily comprised of well-maintained single-family housing units. Based on HUD data in **Table 27**, approximately 37% of the housing stock is single-unit detached structures, with an additional 27% single-family attached units (i.e., condominiums and townhomes). The remaining 36% of the housing stock is mainly multi-family. **Table 27** contains specific housing figures, and **Table 28** shows units by bedroom size and tenure.

All residential properties by number of units

Property Type	Number	%
1-unit detached structure	7,320	37%
1-unit, attached structure	5,325	27%
2-4 units	1,010	5%
5-19 units	3,355	17%
20 or more units	2,735	14%
Mobile Home, boat, RV, van, etc	30	0%
Total	19,775	100%

Table 27 – Residential Properties by Unit Number

Data Source: 2013-2017 ACS

Updated Information

According to the California Department of Finance, as of January 2022, there are a total of 20,189 housing units in Aliso Viejo:

- Single-family detached – 7,048 units (34.9% of total housing stock)
- Single family attached – 5,232 units (25.9% of total housing stock)
- Multi-family – 7,909 units (39.2% of total housing stock)

Unit Size by Tenure

	Owners		Renters	
	Number	%	Number	%
No bedroom	45	0%	180	2%
1 bedroom	250	2%	2,035	27%
2 bedrooms	2,845	25%	3,335	45%
3 or more bedrooms	8,095	72%	1,870	25%
Total	11,235	99%	7,420	99%

Table 28 – Unit Size by Tenure

Data Source: 2013-2017 ACS

Describe the number and targeting (income level/type of family served) of units assisted with federal, state, and local programs.

The City has four affordable housing developments, with 528 affordable units for lower-income renter households – 148 for lower-income households plus 400 for lower-income seniors.

Provide an assessment of units expected to be lost from the affordable housing inventory for any reason, such as expiration of Section 8 contracts.

State law requires that the City identify, analyze, and propose programs to preserve existing multi-family rental units which are eligible to convert to non-low-income housing uses due to the termination of subsidy contract, mortgage prepayment, or expiring use restrictions during ten years commencing on the statutory deadline of the Housing Element update. None of the city's affordable housing units are at risk of converting to market-rate housing in the 2021-2029 Housing Element planning period.

Does the availability of housing units meet the needs of the population?

The Southern California Association of Governments (SCAG) undertakes a Regional Housing Needs Assessment (RHNA) to quantify the anticipated need for housing within a five-county region that includes Orange County. California General Plan law requires each city and county to have land zoned to accommodate its fair share of the regional housing need calculated by SCAG. The California Department of Housing and Community Development (HCD) allocates a numeric regional housing goal to the SCAG figures, which are then mandated to be distributed among the cities and counties in the region. The RHNA aims to ensure a fair distribution of housing among cities and counties within the SCAG region so that every community provides a mix of housing for all economic segments. The housing allocation targets are not building requirements but planning goals for each community to accommodate through appropriate planning policies and land use regulations. Allocation targets are intended to ensure adequate sites and zoning are available to address anticipated housing demand during the planning period. The distribution of housing needs by income category for each jurisdiction is adjusted to avoid the concentration of lower-income households in any community. As determined by SCAG, the City of Aliso Viejo's allocation is 1,195 new housing units during the 2021-2029 planning cycle.

Describe the need for specific types of housing:

The current RHNA for the SCAG region covers the planning period of 2021 through 2029. The Housing Need Allocation is divided into four income categories: very low-, low-, moderate-, and above-moderate income. Aliso Viejo's allocation of 1,195 new housing units is divided among the following four income categories:

- Very-Low Income (including Extremely Low-Income): 390 units
- Low-Income: 214 units
- Moderate-Income: 205 units
- Above Moderate-Income: 386 units

It is important to note that the City has accommodated the development of its total RHNA obligation through housing units built, development agreements, and the rezoning of vacant parcels.

Discussion

The City of Aliso Viejo has a balanced mix of housing units, with approximately 20,190 housing units of various sizes for renters and owners. Regional planners have allocated a multi-year housing goal to the City to meet its share of future housing needs. Housing goals are established for various income levels. The City's Housing Element has established a strategy and programs to meet these housing goals.

MA-15 Housing Market Analysis: Cost of Housing - 91.210(a)

Introduction

Table 29 shows that the median home purchase in Aliso Viejo dipped slightly between 2009 and 2017; however, the *Orange County Register* reports that in March 2023, the median home price for Aliso Viejo was \$725,000. **Table 30** shows rents paid in Aliso Viejo by cost category. In 2017, approximately two-fifths of renters paid more than \$2,000 monthly for housing. According to Zillow.com, the average Aliso Viejo renter's monthly rent in February 2023 is \$3,037. Considering current housing costs and data analysis from the Housing Needs Assessment, it is unsurprising that housing costs burden many Aliso Viejo residents.

Cost of Housing

	Base Year: 2009	Most Recent Year: 2017	% Change
Median Home Value	587,000	582,300	(1%)
Median Contract Rent	1,676	1,903	14%

Table 29 – Cost of Housing

Data Source: 2000 Census (Base Year), 2013-2017 ACS (Most Recent Year)

Rent Paid	Number	%
Less than \$500	225	3.0%
\$500-999	280	3.8%
\$1,000-1,499	705	9.5%
\$1,500-1,999	3,205	43.2%
\$2,000 or more	3,005	40.5%
Total	7,420	99.9%

Table 30 - Rent Paid

Data Source: 2013-2017 ACS

Housing Affordability

% Units affordable to Households earning	Renter	Owner
30% HAMFI	115	No Data
50% HAMFI	410	40
80% HAMFI	1,125	215
100% HAMFI	No Data	549
Total	1,650	804

Table 31 – Housing Affordability

Data Source: 2013-2017 CHAS

Monthly Rent

Monthly Rent (\$)	Efficiency (no bedroom)	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Fair Market Rent	\$1,716	\$1,905	\$2,324	\$3,178	\$3,674
High HOME Rent	\$1,523	\$1,633	\$1,961	\$2,257	\$2,737
Low HOME Rent	\$1,186	\$1,270	\$1,525	\$1,761	\$1,965

Table 32 – Monthly Rent

Data Source: HUD 2022 FMR and HOME Rents

Is there sufficient housing for households at all income levels?

Based on the above data, there is a limited supply of housing units affordable for lower-income Aliso Viejo households. As indicated in **Table 29**, the median home price in 2017 was over \$580,00; recent median home prices are hovering at \$725,000. Based on general real estate professional underwriting and current interest rates, a homebuyer with good credit and a 20% down payment needs an annual household income of over \$160,000 to purchase a median-priced home in Aliso Viejo. This is well above the 2021 Aliso Viejo household median income of \$122,320. **Table 30** indicates that in 2017, over 40% of Aliso Viejo renters paid over \$2,000 in monthly rent; however, current data indicates monthly rents are significantly higher (\$3,037 per month). Utilizing HUD's rent-to-income affordability ratio (i.e., 30% of income for housing), a renter would need an annual income of over \$121,000 to afford the current priced two-bedroom unit. **Table 31** illustrates housing affordability in the City.

How is affordability of housing likely to change considering changes to home values and/or rents?

While raising interest rates on mortgages and rental rates have increased since 2020, the demand for housing in Orange County has not diminished. The Orange County Register reports that Aliso Viejo median home sales prices have dropped 13.4% from January 2022; however, as illustrated above, most lower-income homebuyers would likely not qualify for a conventional home purchase loan. Online data indicates rental rates have consistently trended upward, especially post-pandemic with the lifting of the statewide eviction moratorium.

How do HOME rents / Fair Market Rent compare to Area Median Rent? How might this impact your strategy to produce or preserve affordable housing?

The City of Aliso Viejo is not a participating jurisdiction in HUD's HOME program; however, comparing the City's current median monthly rent to HUD's rent standards for a two-bedroom unit illustrates the high cost of Aliso Viejo's housing market (see **Table 32**). For example, the current monthly rent for a two-bedroom is \$3,037 - \$713 more than HUD's Fair Market Rent for a two-bedroom unit. This rent level is \$1,076 more than the High HOME rent and \$1,512 higher than the Low HOME rent. These figures indicate deep subsidies would be necessary to bring project rents into the affordable housing range for lower-income households.

Discussion

Evaluation of Aliso Viejo's housing market supports the Needs Assessment findings. Despite a good mix of housing types by tenure, lower-income households in the City are cost-burdened, especially extremely low-income and very low-income households. The supply of affordable housing units at cost/rent to lower-income households is limited, resulting in lower-income households dedicating a more significant portion of their income to maintaining housing.

MA-20 Housing Market Analysis: Condition of Housing – 91.210(a)

Introduction

HUD requires that the City evaluate the condition of the City's housing stock as part of the Consolidated Plan. It is important to note that Aliso Viejo's housing stock is generally in good condition and well maintained.

Definitions

Substandard condition: A dwelling is considered substandard if the unit contains a condition that endangers the life, limb, health, property, safety, or welfare of the public or the occupants, as defined in the California Health and Safety Code.

Substandard condition but suitable for rehabilitation: For purposes of the CDBG program, a unit is substandard but suitable for rehabilitation if the cost to remedy all substandard conditions plus the current value of the property does not exceed the after-rehabilitation value of the property.

Four housing problems that HUD recognizes as substandard or problematic are:

1. Lack of complete kitchen facilities
2. Lack of complete plumbing facilities
3. More than one person per room
4. Cost burden greater than 30%

Condition of Units

Condition of Units	Owner-Occupied		Renter-Occupied	
	Number	%	Number	%
With one selected Condition	3,345	30%	3,490	47%
With two selected Conditions	70	1%	180	2%
With three selected Conditions	20	0%	0	0%
With four selected Conditions	0	0%	0	0%
No selected Conditions	7,800	69%	3,755	51%
Total	11,235	100%	7,425	100%

Table 33 - Condition of Units

Data Source: 2013-2017 ACS

Year Unit Built

Year Unit Built	Owner-Occupied		Renter-Occupied	
	Number	%	Number	%
2000 or later	1,555	14%	1,130	15%
1980-1999	9,195	82%	5,540	75%
1950-1979	410	4%	685	9%
Before 1950	70	1%	70	1%
Total	11,230	101%	7,425	100%

Table 34 – Year Unit Built

Data Source: 2013-2017 CHAS

Risk of Lead-Based Paint Hazard

Risk of Lead-Based Paint Hazard	Owner-Occupied		Renter-Occupied	
	Number	%	Number	%
Total Number of Units Built Before 1980	480	4%	755	10%
Housing Units built before 1980 with children present	3,200	28%	1,910	26%

Table 35 – Risk of Lead-Based Paint

Data Source: 2013-2017 ACS (Total Units) 2013-2017 CHAS (Units with Children present)

Vacant Units

	Suitable for Rehabilitation	Not Suitable for Rehabilitation	Total
Vacant Units			
Abandoned Vacant Units			
REO Properties			
Abandoned REO Properties			

Table 36 - Vacant Units

Data Source: 2005-2009 CHAS

Need for Owner and Rental Rehabilitation

Based on data from **Table 34**, approximately 96% of Aliso Viejo's owner housing stock was built after 1980. Generally, homes built within the last 30 years are in good shape, with little repair required. Homes begin to show age after 30 years and can require significant maintenance and even rehabilitation. Data from **Table 9** indicates that 1,449 lower-income homeowners are spending more than 30% of their income on housing; 959 of these owners are spending more than 50% of their income on housing (**Table 10**). City-funded housing rehabilitation assistance may help some homeowners improve their homes without incurring additional housing costs.

Table 34 also indicates that approximately 90% of the City's rental housing stock was built after 1980. As discussed above, housing units constructed before 1980 may benefit from rehabilitation assistance

programs to deferred improvements that address health and safety issues. Current tax regulations provide owners of rental properties with various incentives to maintain their investments.

Estimated Number of Housing Units Occupied by Low or Moderate Income Families with LBP Hazards

Lead based-paint was banned in the United States in 1978. **Table 34** indicates 1,235 housing units in Aliso Viejo were constructed before 1980 – approximately 6.6% of the City’s total housing stock. (Note: **Table 35** shows that over 5,100 housing units in the City were constructed before 1980 with “children present.” This is clearly a mistake in HUD’s data. Based on the overall age of the City’s housing stock, lead-based paint hazards are unlikely to be a significant community issue.

Furthermore, based on consultation with the California Department of Public Health and the State of California Department of Public Health, lead poisoning among Orange County children is minimal. In 2021, the most recent year for which statistics are available, 24,912 children under six years old were tested for elevated Blood Lead Levels (BLLs); 368 (1.46%) had a BLL greater than 3.5 micrograms per deciliter, the threshold experts indicate requires treatment. The State generates a list of municipalities with a considerable number of children under six years old with elevated BLL – Aliso Viejo is not listed. According to the State, “Data are suppressed for local health jurisdictions that did not have enough blood lead tests in 2021 to meet the California Health and Human Services Agency’s Data De-Identification Guidelines for public release.”

It is important to note that lead-based paint is not the only possible source of lead poisoning. Some imported foods, home remedies, and cosmetics contain lead, as do some glazes used to make imported handmade pottery and tableware products.

As the City explores the creation of a CDBG-funded housing rehabilitation program, program guidelines will ensure all housing units constructed before 1980 are tested for lead-based paint hazards. The program guidelines will also address all lead-based risks as part of the overall rehabilitation project.

Discussion

In general, Aliso Viejo’s housing stock is well maintained and in good to excellent condition; however, it is important to note that the City’s housing stock is aging, and a small percentage of housing units are over 40 years old. After 30 years, homes may need significant maintenance and even extensive rehabilitation (roofs, plumbing, etc.). Lead-based paint hazards do not appear to be an issue since most of the City’s housing stock was constructed after 1980; however, if the City establishes a CDBG-funded housing rehabilitation program, lead-based paint hazards will be addressed as part of the rehabilitation as required by HUD.

MA-25 Public and Assisted Housing – 91.210(b)

Introduction

The City of Aliso Viejo does not own or manage public housing.

Totals Number of Units

	Program Type								
	Certificate	Mod-Rehab	Public Housing	Vouchers					
				Total	Project - based	Tenant - based	Special Purpose Voucher		
							Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
# of units vouchers available				9,925			879	1,669	0
# of accessible units									
*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition									

Table 37 – Total Number of Units by Program Type

Data Source: PIC (PIH Information Center)

Describe the supply of public housing developments:

Describe the number and physical condition of public housing units in the jurisdiction, including those that are participating in an approved Public Housing Agency Plan:

Not applicable

Public Housing Condition

Public Housing Development	Average Inspection Score
NA	NA

Table 38 - Public Housing Condition

Describe the restoration and revitalization needs of public housing units in the jurisdiction:

Not applicable

Describe the public housing agency's strategy for improving the living environment of low- and moderate-income families residing in public housing:

Not applicable

Discussion:

The City of Aliso Viejo does not own or manage public housing.

MA-30 Homeless Facilities and Services – 91.210(c)

Introduction

As previously discussed, the 2022 Point-In-Time Survey of the homeless estimated there were 13 unsheltered and four shelter homeless in Aliso Viejo. There are no homeless shelters in the City; however, in recent years, the City has purchased two housing units with affordable covenants at risk of converting to market rate. Both units are two-bedroom condominiums. The City has leased the units to a regional homeless service provider to provide transitional housing for homeless families with children. Each unit can house two to four household members (conservatively 2 “beds” per unit). Aliso Viejo also supports local homeless service providers with financial assistance. These agencies provide access to shelter beds outside the city limits.

Facilities and Housing Targeted to Homeless Households

	Emergency Shelter Beds		Transitional Housing Beds	Permanent Supportive Housing Beds	
	Year Round Beds (Current & New)	Voucher / Seasonal / Overflow Beds	Current & New	Current & New	Under Development
Households with Adult(s) and Child(ren)	0	0	4	0	0
Households with Only Adults	0	0	0	0	0
Chronically Homeless Households	0	0	0	0	0
Veterans	0	0	0	0	0
Unaccompanied Youth	0	0	0	0	0

Table 39 - Facilities and Housing Targeted to Homeless Households

Data Source Comments: City of Aliso Viejo

Describe mainstream services, such as health, mental health, and employment services to the extent those services are used to complement services targeted to homeless persons

The City of Aliso Viejo does not provide direct services to the homeless; however, the City does provide financial assistance to nonprofit agencies that provide housing and support services for homeless Aliso Viejo residents and residents at risk of becoming homeless. Case managers at these service agencies work closely with clients to identify and link households to appropriate mainstream services and resources. Examples of mainstream services available to the homeless and those at risk of homelessness include veterans' housing vouchers, veteran medical services, MediCal/Medicare, SSI, and general relief.

List and describe services and facilities that meet the needs of homeless persons, particularly chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth. If the services and facilities are listed on screen SP-40 Institutional Delivery Structure or screen MA-35 Special Needs Facilities and Services, describe how these facilities and services specifically address the needs of these populations.

Table 39 indicates there are four shelter beds for homeless families with children in the City of Aliso Viejo. Additionally, the City has established relationships with local service providers to address the needs of the City's homeless and those at risk of becoming homeless. Service providers include the following:

- Family Assistance Ministries: A continuum of housing and support services for homeless adults and families with children
- Laura's House: Emergency and transitional housing and support services for victims of domestic violence
- South County Outreach: Homelessness prevention and case management services for homeless individuals and families with children
- Community Services Program (CSP) Youth Shelter: Emergency shelter for youths
- Friendship Shelter: Shelter and support services for homeless men and women

MA-35 Special Needs Facilities and Services – 91.210(d)

Introduction

HUD requires that the Consolidated Plan identify, to the extent information is available, the housing and services needs of persons who are not homeless and with special needs.

Including the elderly, frail elderly, persons with disabilities (mental, physical, developmental), persons with alcohol or other drug addictions, persons with HIV/AIDS and their families, public housing residents and any other categories the jurisdiction may specify, and describe their supportive housing needs

Senior and Frail Elderly: Based on consultation with the Council on Aging – Southern California, it has been determined that three managed care facilities in the City of Aliso Viejo have 544 residential care beds. These facilities range in size from 24 beds to 340.

Group Homes/Quarters: The State of California Department of Finance reports that in January 2022, 479 Aliso Viejo residents lived in group quarters. Group quarters include college residence halls, residential treatment centers, group homes, military barracks, correctional facilities, and workers' dormitories.

HIV/AIDS Housing: As stated previously, there are no shelters or permanent housing units for persons with HIV/AIDS in Aliso Viejo.

Public Housing Residents: There is no public housing in Aliso Viejo. As of February 2022, 161 households in Aliso Viejo received a rental assistance housing voucher or certificate from OCHA.

Describe programs for ensuring that persons returning from mental and physical health institutions receive appropriate supportive housing

The OC-CoC manages the Coordinated Entry System (CES). The CES aims to “effectively connect individuals and families at-risk of homelessness or experiencing homelessness to appropriate services and housing interventions to secure permanent and stable housing” The OC-CoC determines and prioritizes access to the region’s shelter and permanent supportive housing resources. It also manages the related shelter bed reservation system. Individuals discharged from public facilities (such as jails) and public systems (such as the foster care system) will likely access supportive housing and services through these systems.

Specify the activities that the jurisdiction plans to undertake during the next year to address the housing and supportive services needs identified in accordance with 91.215(e) with respect to persons who are not homeless but have other special needs. Link to one-year goals. 91.315(e)

Before FY 20-21, the City did not allocate CDBG funds to support organizations that provide services to persons with special needs; however, the City did allocate general fund resources to support several

local agencies that serve special needs and at-risk populations. Some of these services are described below:

- Laura’s House: Housing and support services for victims of domestic violence
- South County Outreach: Foodbank, support services, and housing for homeless individuals and individuals at risk of becoming homeless
- Assistance League of Capistrano Valley: A variety of philanthropic programs to support families with students in local elementary and middle schools
- Family Assistance Ministries: Foodbank, support services, and housing for homeless individuals and individuals at risk of becoming homeless
- Glenwood Foundation: Services to support independent living for adults with developmental disabilities
- Assistance League of Capo Valley: Mental health services for youths

For entitlement/consortia grantees: Specify the activities that the jurisdiction plans to undertake during the next year to address the housing and supportive services needs identified in accordance with 91.215(e) with respect to persons who are not homeless but have other special needs. Link to one-year goals. (91.220(2))

Aliso Viejo is not a HOME program participating jurisdiction.

MA-40 Barriers to Affordable Housing – 91.210(e)

Negative Effects of Public Policies on Affordable Housing and Residential Investment

Barriers to affordable housing development generally fall into three categories: Market, Environmental/Infrastructure, and Governmental constraints. The City has little control over market variables that impact the cost of housing (e.g., cost of land and cost of construction supplies, materials, and labor). Similarly, the City has little control over environmental constraints such as seismic and flooding hazards. The City's Housing Element addresses market and environmental/infrastructure barriers. It also evaluates the governmental constraints that may have a negative impact on creating affordable housing opportunities. These barriers are summarized below.

Land Use Controls and Residential Development Standards: Most of the land in Aliso Viejo has either been developed or is permanently preserved for open space or recreation. (The City is designed as a balanced planned community - approximately 1,500 acres, or 40% of the City's land area, is designated for various residential uses.) Residential development standards are in place to help preserve neighborhoods and ensure ample open spaces and recreation facilities. The City has traditionally not placed over-regulatory burdens on land use development, specifically for residential units. Building height, setbacks, lot areas, and parking requirements are generally within the range of other cities in the State.

Development Permit Procedures: Development review and permitting procedures ensure that residential construction proceeds in an orderly manner. However, the time and cost of permit processing and review can constrain housing development if they place an undue burden on the developer. Given the built-out character of the City, the City does not have a backlog of development applications and thus can process applications promptly. The City's development standards and Site Development Permit procedures provide clear, objective guidelines for developers, which helps to minimize the time required to obtain approval and helps to reduce overall development costs.

Planning and Development Fees: Planning and development fees can increase the cost of housing and may constrain the development of affordable housing projects. While fees affect the cost of housing, they are necessary for the City to continue providing essential planning and building services. Fees do not exceed the actual cost of providing these services.

Environmental Review. State and federal laws (e.g., California Environmental Quality Act and National Environmental Policy Act) require an environmental review of proposed discretionary projects. The costs and delays resulting from the environmental review process are usually added to the cost of developing housing in the form of carrying costs which a buyer or tenant ultimately pays.

MA-45 Non-Housing Community Development Assets – 91.215 (f)

Introduction

According to the data from **Table 41** (derived from the 2013-2017 ACS), Aliso Viejo has a civilian labor force of 29,770 and an unemployment rate of 4.79%. Recent data from the California Employment Development Department show that in December 2022, the City's unemployment rate was 2.6%. This rate was slightly higher than the 2.5% unemployment rate recorded for all of Orange County and lower than the 4.0% unemployment rate for California (as of November 2022).

Economic Development Market Analysis

Business Activity

Business by Sector	Number of Workers	Number of Jobs	Share of Workers %	Share of Jobs %	Jobs less workers %
Agriculture, Mining, Oil & Gas Extraction	125	2	1	0	-1
Arts, Entertainment, Accommodations	2,875	2,002	12	9	-3
Construction	1,113	874	5	4	-1
Education and Health Care Services	3,756	4,275	16	20	4
Finance, Insurance, and Real Estate	2,322	2,433	10	11	1
Information	921	1,162	4	5	1
Manufacturing	1,815	873	8	4	-4
Other Services	750	661	3	3	0
Professional, Scientific, Management Services	3,696	3,964	16	19	3
Public Administration	0	0	0	0	0
Retail Trade	2,117	1,463	9	7	-2
Transportation and Warehousing	495	904	2	4	2
Wholesale Trade	1,454	1,400	6	7	0
Total	21,439	20,013	--	--	--

Table 40 - Business Activity

Data Source: 2013-2017 ACS (Workers), 2017 Longitudinal Employer-Household Dynamics (Jobs)

Labor Force

Total Population in the Civilian Labor Force	29,770
Civilian Employed Population 16 years and over	28,345
Unemployment Rate	4.79
Unemployment Rate for Ages 16-24	9.96
Unemployment Rate for Ages 25-65	3.79

Table 41 - Labor Force

Data Source: 2013-2017 ACS

Occupations by Sector	Number of People
Management, business and financial	11,780
Farming, fisheries and forestry occupations	855
Service	1,930
Sales and office	7,320
Construction, extraction, maintenance and repair	755
Production, transportation and material moving	755

Table 42 – Occupations by Sector

Data Source: 2013-2017 ACS

Travel Time

Travel Time	Number	Percentage
< 30 Minutes	15,865	62%
30-59 Minutes	7,470	29%
60 or More Minutes	2,130	8%
Total	25,465	100%

Table 43 - Travel Time

Data Source: 2013-2017 ACS

Education:

Educational Attainment by Employment Status (Population 16 and Older)

Educational Attainment	In Labor Force		Not in Labor Force
	Civilian Employed	Unemployed	
Less than high school graduate	810	135	210
High school graduate (includes equivalency)	2,270	205	465
Some college or Associate's degree	6,960	345	1,310
Bachelor's degree or higher	14,530	445	2,105

Table 44 - Educational Attainment by Employment Status

Data Source: 2013-2017 ACS

Educational Attainment by Age

	Age				
	18–24 yrs	25–34 yrs	35–44 yrs	45–65 yrs	65+ yrs
Less than 9th grade	20	80	80	375	110
9th to 12th grade, no diploma	280	135	75	410	75
High school graduate, GED, or alternative	1,190	875	745	1,315	715
Some college, no degree	1,680	1,415	1,430	3,190	995
Associate's degree	240	680	525	1,380	440
Bachelor's degree	465	3,270	3,460	4,560	1,085
Graduate or professional degree	25	1,035	1,895	2,860	710

Table 45 - Educational Attainment by Age

Data Source: 2013-2017 ACS

Educational Attainment – Median Earnings in the Past 12 Months

Educational Attainment	Median Earnings in the Past 12 Months
Less than high school graduate	23,265
High school graduate (includes equivalency)	42,220
Some college or Associate's degree	51,205
Bachelor's degree	73,600
Graduate or professional degree	99,165

Table 46 – Median Earnings in the Past 12 Months

Data Source: 2013-2017 ACS

Based on the Business Activity table above, what are the major employment sectors within your jurisdiction?

Aliso Viejo is home to 12 regional and corporate headquarters in various fast-growing industries. According to **Table 40**, the City's four major business activity sectors account for 59% of total "workers" and 63% of total "jobs."

- Education and Health Care Services - 16% of Workers and 20% of Jobs
- Professional, Scientific, Management Services -16% of Workers and 19% of Jobs
- Arts, Entertainment, Accommodations – 12% of Workers and 9% of Jobs
- Finance, Insurance, and Real Estate - 10% of Workers and 11% of Jobs

These figures are consistent with economic development information provided by the City, which identifies United Parcel Service, Capistrano Unified School District, Fluor Corporation, Quest Software, and Glaukos as the City's largest employers.

Describe the workforce and infrastructure needs of the business community:

According to HUD data from **Table 44**, the City's workforce is well-educated. Approximately 87.5% of the City's civilian workforce has some college education, with the majority holding a bachelor's or higher degree. This well-educated labor force appears compatible with the City's major employment sectors – high-profile established companies, fast-growing firms, and emerging industries.

Overall Aliso Viejo's public infrastructure is in good to excellent condition. As a master-planned community, the City offers modern retail and office buildings and state-of-the-art community amenities with preplanned access to transportation corridors and adjacent to compatible land uses.

Describe any major changes that may have an economic impact, such as planned local or regional public or private sector investments or initiatives that have affected or may affect job and business growth opportunities during the planning period. Describe any needs for workforce development, business support or infrastructure these changes may create.

In 2015, the City prepared an ***Economic Development Analysis and Strategy*** report to help identify the best means to promote economic vitality and growth for the City. This report identified several "Opportunity Sites" throughout the City. The report included development challenges unique to each site, such as limited accessibility, site clearance, and other non-infrastructure issues. The report indicates the City is a relatively affluent, highly educated community. It is conveniently located in South Orange County, with an emerging technology-based economy supported by a strong day-time population of professional, scientific, technical, and healthcare workers. However, the report indicates the City performs below average relative to neighboring jurisdictions in terms of per capita retail/restaurant sales and the capture of resident and non-resident spending. The report recommended that the City promote itself, target industries (i.e., technology and startup firms), and attract restaurants to the City's primary retail, dining, and entertainment district – the Aliso Viejo Town Center (AVTC). With limited land for retail space, the City has initiated plans to revitalize the center. Revitalization plans under consideration include constructing a structured parking lot wrapped with new retail space on the ground floor and office/residential uses above. The project may also include the development of a new signature building to house a hotel on the site.

How do the skills and education of the current workforce correspond to employment opportunities in the jurisdiction?

The Orange County Business Council's latest ***Orange County Workforce Indicators Report*** (2021) provides a detailed overview of the Orange County economy, highlighting strengths driving economic growth in the region and issues limiting the County's economic performance. The report identifies economic changes and disruptions caused by the COVID-19 pandemic. It highlights how the pandemic accelerated long-term trends, such as the emergence of e-commerce at the expense of brick-and-mortar retail and a shift from the traditional workplace to remote work, distance learning, and telehealth. The report also highlights emerging technologies driving the local economy, such as cybersecurity, Artificial Intelligence (AI), computer/video gaming, ophthalmic/vision, and drones. Aliso Viejo's well-educated

workforce seems compatible with these evolving industries; however, based on data from **Table 43**, there appears to be a shortage of individuals with STEM-related degrees that these emerging technologies require.

Describe any current workforce training initiatives, including those supported by Workforce Investment Boards, community colleges and other organizations. Describe how these efforts will support the jurisdiction's Consolidated Plan.

As reported above, the COVID-19 pandemic accelerated certain market and economic trends as businesses responded to the changing needs of customers and employees. The **Orange County Workforce Indicators** Report asserts that demand for cybersecurity operations emerged as corporate functions shifted during the pandemic in response to mandatory closures and remote work/education. The report predicts a 20% increased demand for Information Security Analysts through 2026. Orange County is well-positioned to provide this academic support. For example, UC Irvine and Cal State Fullerton offer Computer Science degrees emphasizing cybersecurity. Community colleges (including Irvine Valley and Saddleback) offer some form of cybersecurity certifications; however, the report states, “local educational institutions will need to expand program offerings while marketing these opportunities to both current and prospective students.”

Orange County universities have also fueled AI-related innovation. For example, UC Irvine is home to the Center for Artificial Intelligence in Diagnostic Medicine and the Center for Machine Learning and Intelligent Systems (part of the Bren School of Information and Computer Science). Several Orange County community colleges offer students an introductory course summarizing AI and AI analytics across several industries and processes. Additionally, several Orange County high schools offer classes in AI technology.

Video and computer gaming, like AI technology, is a major growth industry. Orange County is home to several computer and video game developers, including Aliso Viejo-based Gaikai, which produces technological foundations for streaming and cloud-based gaming for Sony. Local education institutions have begun preparing students for employment in this growing field, offering programs such as Esports management, game-based learning design, visual program computer game design, and game mathematics.

According to **Orange County Workforce Indicators** report, the global drone industry will reach a value of \$100 billion over the next five years. Recently, El Pollo Loco made headlines when it announced plans to begin drone delivery, including from a few of its Orange County locations. Southern California Edison has used drones to inspect electrical infrastructure in high-fire-risk areas as part of its Wildfire Mitigation Plan. Drones will likely become a growth industry due to their tremendous untapped commercial potential. The report states that Orange County educational institutions should develop drone-related courses to prepare the workforce for the future of drones. Finally, the **Orange County Workforce Indicators** report finds a continued increase in demand for healthcare-related industries such as Ophthalmology and Ophthalmic goods manufacturing. This focus on ophthalmic technology aligns with the County’s current and historical strengths in biotech and medical device manufacturing. In terms of

education, UC Irvine's Gavin Herbert Institute and Department of Ophthalmology at the School of Medicine is an internationally recognized center that provides highly specialized training and access to clinical trials with cutting-edge technology. UC Irvine also offers certificate programs in Optical Engineering and Optical Instrument Design, allowing students to focus on treating patients and creating products that benefit patients.

Does your jurisdiction participate in a Comprehensive Economic Development Strategy (CEDS)?

No

If so, what economic development initiatives are you undertaking that may be coordinated with the Consolidated Plan? If not, describe other local/regional plans or initiatives that impact economic growth.

As outlined above, the City will support regional initiatives to create an environment that promotes economic growth. The Town Center revitalization plan has the potential to generate significant employment opportunities during the project's construction phase and, ultimately, a variety of retail, service, and hospitality-based employment opportunities.

Additionally, the City is a member of OCTANe. This venture organization links regional biomedical and information technology companies with resources and capital to drive the growth of technology industries in Orange County.

Discussion

Aliso Viejo has a well-educated workforce and a low unemployment rate. It is also a center for technology-based enterprises; nonetheless, the City is actively expanding employment opportunities for residents and improving the local business environment. The City supports regional efforts to take advantage of nearby educational institutions to train and educate workers for good-paying tech jobs.

MA-50 Needs and Market Analysis Discussion

Are there areas where households with multiple housing problems are concentrated? (include a definition of "concentration")

Based on data from the Housing Needs Assessment, it has been determined housing cost burden (i.e., paying more than 30% of household income for housing) is the most prevalent housing problem in Aliso Viejo. For this Market Analysis discussion, a housing problem “concentration” is defined as a Census Tract with at least 50% of households experiencing a housing cost burden. Based on an evaluation of HUD data, it has been determined there is one Census Tracts in the City with a concentration of households with a housing cost problem – four Census Tracts have cost-burden concentrations of over 40% (see **Appendix 3, Map C**):

- Tract 0626.37: 52.04% of residents are housing cost burden
- Tract 0423.20: 48.19% of residents – note this Tract is shared with the adjoining community
- Tract 0626.41: 46.85% of residents – note this Tract is shared with the adjoining community
- Tract 0626.40: 45.26% of residents are housing cost burden
- Tract 0626.36: 41.75% of residents are housing cost burden

Are there any areas in the jurisdiction where racial or ethnic minorities or low-income families are concentrated? (include a definition of "concentration")

As previously discussed, Asians and Hispanics comprise the community’s most prominent minority populations – 16.3% and 18.9%, respectively. Per HUD’s CPDMaps program, the City’s Asian population lives throughout the community. The Census Tract with the highest concentration of Asian residents is 0626.38, with 21.12% Asian residents. The Census Tract with the largest concentration of Hispanics is Census Tract 0423.20, with nearly a third of residents (28.7%) identified as of “Hispanic Origin. (Note: this Census Tract is shared with two neighboring jurisdictions.) See **Appendix 3 – Map A** and **Map B**. **Appendix 3, Map D** identifies Block Groups that comprise the City’s CDBG-eligible areas, that is, Block Groups with the highest concentrations of Low- and Moderate-income residents, including three Block Groups, with a large percentage of Hispanics (over 20% of residents).

What are the characteristics of the market in these areas/neighborhoods?

The three Block Groups identified above are primarily residential, comprised of apartments, condominiums, and single-family detached properties. Census Tract 626.36 Block Group 1 has two community parks adjacent to residential properties. In general, residential properties are typically in good condition. Aliso Creek Road bisects Census Tract 626.40 Block Group 2; the east segment is primarily residential, while the west is a commercial and light industrial mix. Census Tract 423.20 Block Group 3 is predominantly residential.

Are there any community assets in these areas/neighborhoods?

As indicated above, lower-income block groups are primarily residential with typical neighborhood amenities such as parks, pathways, and schools. Schools provide recreational facilities for local club sports teams and residents. School facilities also offer convenient locations for community meetings and events. Community parks provide recreational and leisure amenities for residents, such as basketball and tennis courts, picnic shades and BBQs. Residential neighborhoods are typically ringed by commercial and retail uses that provide goods and services for local residents and businesses. As described above, a portion of one block group is primarily commercial/light industrial, providing employment opportunities for Aliso Viejo residents.

Are there other strategic opportunities in any of these areas?

The Iglesia Neighborhood is mostly built-out with limited to no development opportunities. According to CPDMaps data, this area is 67.3% owner-occupied. A significant percentage of the housing stock in this neighborhood was built before 1980 (36.1%), with 4.5% of units built before 1949. The age of housing indicates a burgeoning need to rehabilitate the neighborhood's housing stock.

MA-60 Broadband Needs of Housing occupied by Low- and Moderate-Income Households - 91.210(a)(4), 91.310(a)(2)

Describe the need for broadband wiring and connections for households, including low- and moderate-income households and neighborhoods.

It appears that Aliso Viejo residents have several options for broadband services. According to BroadbandNow.com, Cox Communications is the top broadband service provider in Aliso Viejo, covering 99.9% of the City. AT&T Internet and EarthLink are also available via fiber optic cable or DSL to 91.8% and 92.9% of Aliso Viejo properties, respectively. Three additional providers offer satellite or 5-G-based broadband service. In past years competition among service providers was vital to controlling costs; however, the Affordable Connectivity Program has lowered the price of most basic data plans for lower-income households to the point where there is little difference in monthly fees among service providers.

Describe the need for increased competition by having more than one broadband Internet service provider serve the jurisdiction.

Most broadband service providers in Orange County participate in the Affordable Connectivity Program (ACP). The ACP was created with the passage of the Infrastructure and Jobs Act of 2021. The purpose of the ACP is to provide eligible households with a \$30 discount on monthly broadband internet service. ACP eligibility is based on household income (200 percent of federal poverty or less) or participation in specific government assistance programs, such as SSI, Medicaid, or WIC. Funding may also be available to provide “discounts” for connective devices such as a laptop, a desktop computer, or a tablet. Information about the ACP is readily available online; however, many of the City’s nonprofit service providers will inform clients of this program and may also assist clients in applying for benefits. Additionally, the City will continue encouraging developers and property owners to incorporate broadband infrastructure into all new or substantially rehabilitated housing projects, especially affordable housing projects.

MA-65 Hazard Mitigation - 91.210(a)(5), 91.310(a)(3)

Describe the jurisdiction's increased natural hazard risks associated with climate change.

The Disaster Mitigation Act of 2000 requires local governments to prepare a plan to document their hazard mitigation planning process and to identify hazards, potential losses, mitigation needs, goals, and strategies. Each state and local government must have a federally approved mitigation plan to be eligible for hazard mitigation grant funding (e.g., FEMA). In March 2023, the City of Aliso Viejo entered into an agreement with a local planning firm to prepare its Local Hazard Mitigation Plan (LHMP).

The LHMP will likely evaluate natural and human-induced environmental hazards such as wildland fire, seismic activity, geology, and flooding. The LHMP will also examine how climate change may affect these and other hazards that may threaten the community. Staff anticipates that the City Council will adopt the LHMP in March 2024.

Describe the vulnerability to these risks of housing occupied by low- and moderate-income households based on an analysis of data, findings, and methods.

Disasters can cause loss of life; damage buildings and infrastructure; and have devastating consequences for a community's economic, social, and environmental well-being. Hazard mitigation reduces disaster damages and can reduce or eliminate the long-term risk to human life and property from hazards. Proactive mitigation policies and actions help reduce risk and create a safer, more disaster-resilient community. The LHMP allows public officials and Aliso Viejo residents to understand the threats from natural and human-caused hazards in the community. The plan will recommend specific actions to decrease threats before disasters occur. Besides protecting public health and safety, hazard mitigation planning can save money. Studies estimate that every dollar spent on mitigation saves an average of four dollars on response and recovery costs. An LHMP can also help strengthen the mission of public safety officers, such as police and fire department staff, providing them with clear roles and responsibilities to build a safer community. The LHMP will benefit all Aliso Viejo residents, including lower-income households.

Strategic Plan

SP-05 Overview

Strategic Plan Overview

The Strategic Plan is the centerpiece of the City of Aliso Viejo's 2023–2027 Consolidated Plan. The Strategic Plan identifies the programs and projects the City will consider or undertake during the five-year Consolidated Plan cycle. In addition to identifying resources, goals, and objectives to implement housing and community development activities, the Strategic Plan includes several sub-strategies, including developing institutional structures, addressing homeless issues, overcoming barriers to affordable housing, and program/project monitoring efforts.

The City's overall objective for the CDBG program mirrors the HUD's program objective: to create a viable community by providing decent housing, a suitable living environment, and economic opportunities, principally for persons of low- and moderate-income. To accomplish this objective in Aliso Viejo, the following Consolidated Plan goals have been identified based on the input of residents and other community stakeholders:

- Conserve and expand the supply of affordable housing
- Support housing and services for the homeless and those at risk of becoming homeless
- Support community services benefitting low- and moderate-income persons and individuals with special needs
- Provide needed public infrastructure and facility improvements benefitting low- and moderate-income persons and those with special needs
- Ensure quality, professional administration of federal funds, including providing fair housing services to address discriminatory actions that may impede access to housing

All programs and projects are subject to the availability of CDBG funds and the City's annual budget adoption process.

SP-10 Geographic Priorities – 91.215 (a)(1)

Geographic Area

Table 47 - Geographic Priority Areas

1	Area Name:	CDBG-eligible area
	Area Type:	Census Tracts Block Groups
	Other Target Area Description:	Block groups with a concentration of lower-income residents
2	Area Name:	Citywide
	Area Type:	Areas within the city limits
	Other Target Area Description:	Program or activity that is available citywide

General Allocation Priorities

Describe the basis for allocating investments geographically within the jurisdiction (or within the EMSA for HOPWA)

To determine which activities will receive CDBG funding during the 2023-2027 Consolidated Plan cycle, the City utilized a **priority ranking** system:

- **High Priority:** The City will fund activities that address a high priority need during the five-year period, provided adequate CDBG resources are available.
- **Low Priority:** The City may or may not fund low priority need activities during the five-year period.

CDBG funds will be allocated citywide for activities primarily benefiting qualified low- and moderate-income households (i.e., limited-clientele activities). Other activities, such as public improvements, will be limited to eligible areas (see **Appendix 3 - Map D**), except for ADA-related improvements, which may be carried out on a much broader basis.

The City does not receive Housing Opportunities for Persons With AIDS (HOPWA) funds.

SP-25 Priority Needs - 91.215(a)(2)

Priority Needs

Table 48 – Priority Needs Summary

1	Priority Need Name	Public Improvements
	Priority Level	High
	Population	Extremely Low Low Moderate
	Geographic Areas Affected	CDBG-eligible area Citywide
	Associated Goals	Public Facility Improvements Public Infrastructure Improvements
	Description	Installation of new or rehabilitation of existing public infrastructure and public facility improvements
	Basis for Relative Priority	Needs analysis, City department consultation, and public input
2	Priority Need Name	Affordable Housing
	Priority Level	High
	Population	Extremely Low Low Moderate
	Geographic Areas Affected	Citywide
	Associated Goals	Housing Preservation
	Description	Loans, grants, and other forms of financial assistance to improve or expand the City's supply of housing affordable to lower-income households
	Basis for Relative Priority	Based on housing needs analysis, housing market analysis, and public input
3	Priority Need Name	Public Services
	Priority Level	High

	Population	Extremely Low Low Moderate Other – Presumed Benefit populations
	Geographic Areas Affected	Citywide
	Associated Goals	Public Social Services
	Description	Social service programs that provide services to low- and moderate-income residents and special needs
	Basis for Relative Priority	Needs assessment, service provider input, the public input
4	Priority Need Name	Homeless Support Services and Housing
	Priority Level	High
	Population	Chronic Homelessness Individuals Families with Children
	Geographic Areas Affected	Citywide
	Associated Goals	Homeless Continuum of Care
	Description	A continuum of housing and support services for persons at risk of homelessness and the homeless
	Basis for Relative Priority	Needs assessment, service provider input, the public input
5	Priority Need Name	Administration
	Priority Level	High
	Population	Moderate
	Geographic Areas Affected	Citywide
	Associated Goals	Fair Housing Services Program Administration
	Description	Program oversight and coordination may include fair housing services
	Basis for Relative Priority	HUD required

Narrative (Optional)

Impediments to Fair Housing

The Fair Housing Act of 1968 requires HUD and its program participants to administer housing and urban development programs in a manner that does not discriminate directly or indirectly based on race, color, religion, sex, national origin, age, familial status, or disability. The Fair Housing Act prohibits discrimination in housing-related activities and transactions and requires entities to affirmatively further fair housing. The **Analysis of Impediments (AI) to Fair Housing Choice** is the primary policy document HUD grantees utilize for this purpose. HUD encourages jurisdictions to consult with one another and initiate metropolitan-wide planning to address impediments to fair housing choice.

For the 2020-2024 AI cycle, Aliso Viejo has joined with other Orange County cities and the County of Orange to develop a county-wide AI. The regional AI evaluates existing demographic data, past fair housing enforcement activity for each partner community, mortgage lender data, and existing housing and land use public policies. Based on an extensive analysis of this data and the input of residents, a list of impediments to fair housing choice for the participating jurisdictions have been developed. A corresponding set of action steps to address these barriers has also been prepared. The City Council adopted the 2020-2024 Orange County AI in May 2020. A summary of impediments to fair housing and the action steps the City will take during FY 23-24 are found in **Appendix 4**.

SP-30 Influence of Market Conditions – 91.215 (b)

Influence of Market Conditions

Affordable Housing Type	Market Characteristics that will influence the use of funds available for housing type
Tenant Based Rental Assistance (TBRA)	NA – CDBG may not be used for this type of activity.
TBRA for Non-Homeless Special Needs	NA – CDBG may not be used for this type of activity.
New Unit Production	CDBG typically cannot be used for this type of activity; however, funds may be used for certain pre-development costs or off-site public improvements. The Needs Assessment and the Housing Market Analysis indicate a shortage of affordable housing units for lower-income households; however, the fund will unlikely be used for this purpose due to the size of the City's annual CDBG allocation. A substantial amendment to the Consolidated Plan may be necessary if future funding is allocated for such an activity.
Rehabilitation	Overall the City's housing stock is in excellent to good condition; however, according to Table 34 , 79% of the City's housing stock was constructed between 1980 and 1999, which indicates the City's housing stock is approaching an age that may necessitate rehabilitation. The Housing Market analysis data indicates many lower-income homeowners are paying a significant amount of their income for housing (housing cost burden and severe housing cost burden). Housing rehabilitation assistance allows homeowners to address deferred repairs and improve their primary residence without increasing the amount of income dedicated to housing.
Acquisition, including preservation	The Housing Market Analysis data indicates that there is a need for additional housing that is affordable to both renter and owner households. The City's CDBG grant is not large enough to significantly reduce project costs; however, this does not preclude the City from utilizing CDBG funding to acquire real property to create housing opportunities for lower-income households.

Table 49 – Influence of Market Conditions

SP-35 Anticipated Resources - 91.215(a)(4), 91.220(c)(1,2)

Introduction

Fluctuations in CDBG funding make estimating the amount available over the five-year Consolidated Plan cycle difficult. Housing vouchers and certificate resources (via OCHA) and “Community Grants” (i.e., social service grants from the City’s General Fund) may be available to carry out activities that support the goals of the Consolidated Plan. The City has In-lieu Affordable Housing Fee resources collected from past development activity; however, most of this resource has been used to support recent affordable housing activities.

Anticipated Resources

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Remainder of ConPlan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		
CDBG	public - federal	Acquisition Admin and Planning Economic Development Housing Public Improvements Public Services	261,093	0	145,520	406,613	900,000	Annual CDBG allocation

Table 50 - Anticipated Resources

Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied

The City has identified other resources that will be available to carry out activities that address the goals of the Consolidated Plan:

- OCHA reports that as of March 2023, 161 Aliso Viejo households received rental assistance. It is anticipated that an average of 150 households will be assisted annually over the five-year Consolidated Plan cycle

- On an annual basis, the City allocates General Fund resources to support various local social service programs in the community. Services funded with these resources include homelessness prevention and interim housing for homeless families with children and victims of domestic violence. Approximately \$15,000 per year is allocated for social services.
- Approximately \$2.5 million in Affordable Housing In-lieu fees has been generated from past housing development and condo conversions. All funds have been committed to developing additional affordable housing units or preserving existing housing affordability; however, the mechanism for collecting future In-lieu fees remains.

CDBG does not require matching funds.

If appropriate, describe publically owned land or property located within the jurisdiction that may be used to address the needs identified in the plan

Aliso Viejo is a nearly built-out city with limited remaining vacant land designated for development. The City's Housing Element identifies vacant and underutilized sites suitable for housing development. The City's Housing Element identifies eight sites with the zoning to permit up to 1,920 units – 54% of units could be designated for very low and low-income households.

Discussion

Funding resources to implement the City's Consolidated Plan are limited. It is anticipated that CDBG funding will continue to fluctuate. With respect to other resources, the City will continue to support OCHA's efforts to secure new rental assistance resources. For the foreseeable future, the City will continue to support social service programs serving City residents with Community Grants. Resources to support new housing development are limited to In-lieu Affordable Housing Fund resources that have already been committed to developing or preserving affordable housing. As outlined above, an inventory of vacant and underutilized land suitable for housing has been developed.

SP-40 Institutional Delivery Structure – 91.215(k)

Explain the institutional structure through which the jurisdiction will carry out its consolidated plan including private industry, non-profit organizations, and public institutions.

Responsible Entity	Responsible Entity Type	Role	Geographic Area Served
Orange County Housing Authority	PHA	Planning Public Housing Rental	Region
211 Orange County	Continuum of care	Homelessness Planning	Region
Aliso Viejo	Government	Economic Development Homelessness Non-homeless special needs Ownership Planning Rental Neighborhood improvements Public facilities Public services	Jurisdiction
Family Assistance Ministries	Non-profit organizations	Homelessness	Region
Laura's House	Non-profit organizations	Public Services	Region
Age Well Senior Services	Non-profit organizations	Public Services	Region
Fair Housing Foundation	Non-profit organizations	Public Services Administration	Region
South County Outreach	Non-profit organizations	Public Services	Region

Table 51 - Institutional Delivery Structure

Assess of Strengths and Gaps in the Institutional Delivery System

Aliso Viejo has a network of service providers that can deliver various services to City residents. The City has established good working relationships with these agencies, facilitating service delivery. A partial list

of these providers is found in **Table 51**. The City also continues to work with OCHA by supporting their efforts to assist the City's lower-income renters with housing assistance vouchers and certificates.

With respect to gaps in the institutional delivery system, there is a need to improve information sharing with the City and regional players. Communication gaps continue with OCHA and the status of the rental assistance waitlist. OCHA information regarding the waitlist status is limited, resulting in numerous calls to the City for information. Unfortunately, City staff can only refer callers to OCHA, increasing applicant frustration.

Availability of services targeted to homeless persons and persons with HIV and mainstream services

Homelessness Prevention Services	Available in the Community	Targeted to Homeless	Targeted to People with HIV
Homelessness Prevention Services			
Counseling/Advocacy	X	X	
Legal Assistance	X		
Mortgage Assistance			
Rental Assistance	X	X	
Utilities Assistance	X	X	
Street Outreach Services			
Law Enforcement	X	X	
Mobile Clinics			
Other Street Outreach Services	X	X	
Supportive Services			
Alcohol & Drug Abuse			
Child Care	X		
Education			
Employment and Employment Training	X	X	
Healthcare			
HIV/AIDS			
Life Skills	X	X	
Mental Health Counseling	X	X	
Transportation	X	X	
Other			

Table 52 - Homeless Prevention Services Summary

Describe how the service delivery system including, but not limited to, the services listed above meet the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth)

Several service providers are available to assist Aliso Viejo residents at risk of becoming homeless or homeless. Because it is less expensive to help someone stay housed than it is to rehouse them, the primary focus of the City's homeless strategy is to support the provision of safety net services for community residents. These services include assessment and case management, supplemental food, limited financial assistance for rent or utilities to prevent eviction or shut off, and reduced-cost childcare. Safety net services/assistance enables households at risk of homelessness to redirect limited income toward maintaining their housing.

For the homeless, the City has established relationships with housing and service providers that accept referrals from the City. These agencies can address the immediate, interim, and long-term housing needs of the homeless and provide critical support services.

Describe the strengths and gaps of the service delivery system for special needs population and persons experiencing homelessness, including, but not limited to, the services listed above

As indicated above, the City has access to a nonprofit agency network that provides various services to residents, including individuals with special needs. Special needs populations such as seniors, victims of domestic violence, and youths are served by several partner agencies. The City has physically centralized many services at the Family Resource Center to facilitate access to information and key services. The Center offers information and access to many government services and services provided by community partners, such as the Aliso Viejo Police Services, Second Harvest Food Bank, and Soka University.

Provide a summary of the strategy for overcoming gaps in the institutional structure and service delivery system for carrying out a strategy to address priority needs

To overcome gaps, the City will continue to coordinate resources with local service providers to ensure residents in need of services/housing are assisted. The City will also continue cooperating in regional efforts to address county-wide issues such as homelessness.

SP-45 Goals Summary – 91.215(a)(4)

Goals Summary Information

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
1	Infrastructure and Facility Improvements	2023	2027	Non-Housing Community Development	CDBG census tracts Citywide	Public Improvements	CDBG: \$700,263	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 5,000 Persons Assisted
2	Housing Preservation	2023	2027	Affordable Housing	Citywide	Affordable Housing	CDBG: \$200,000	Homeowner Housing Rehabilitated: 10 Housing Units Rental Housing Rehabilitated: 1 Housing Unit
3	Homeless Continuum of Care	2023	2027	Homeless	Citywide	Homeless Support Services and Housing	CDBG: \$110,000	Public service activities other than Low/Moderate Income Housing Benefit: 1,250 Persons Assisted Homeless Person Overnight Shelter: 50 Persons Assisted Homelessness Prevention: 50 Persons Assisted

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
4	Public Social Services	2023	2027	Non-Homeless Special Needs	Citywide	Public Services	CDBG: \$64,150	Public service activities other than Low/Moderate Income Housing Benefit: 450 Persons Assisted
5	Program Administration	2023	2027	Administration	Citywide	Administration and Planning	CDBG: \$232,200	Other: 5 Other

Table 53 – Goals Summary

Goal Descriptions

1	Goal Name	Infrastructure and Facility Improvements
	Goal Description	Provide or improve public infrastructure and facilities that benefit low- and moderate-income neighborhoods and residents
2	Goal Name	Housing Preservation
	Goal Description	Improve or expand the supply of housing affordable to lower-income households
3	Goal Name	Homeless Continuum of Care
	Goal Description	Provide a continuum of housing and supportive services for the homeless and the near homeless
4	Goal Name	Public Social Services
	Goal Description	Provide a safety net of public social services for low- and moderate-income persons and persons with special needs
5	Goal Name	Program Administration
	Goal Description	Provide for administration and planning activities to carry out actions that address needs identified in the Consolidated, including services to address impediments to fair housing

Estimate the number of extremely low-income, low-income, and moderate-income families to whom the jurisdiction will provide affordable housing as defined by HOME 91.315(b)(2)

The City of Aliso Viejo is not a recipient of HOME funds.

SP-50 Public Housing Accessibility and Involvement – 91.215(c)

Need to Increase the Number of Accessible Units (if Required by a Section 504 Voluntary Compliance Agreement)

The City of Aliso Viejo does not own or manage public housing.

Activities to Increase Resident Involvements

Not applicable

Is the public housing agency designated as troubled under 24 CFR part 902?

N/A

Plan to remove the ‘troubled’ designation

Not applicable

SP-55 Barriers to affordable housing – 91.215(h)

Barriers to Affordable Housing

Barriers to affordable housing development generally fall into three categories: Market, Environmental/Infrastructure, and Governmental constraints. The City has little control over market variables that impact the cost of housing (e.g., cost of land and cost of construction supplies, materials, and labor). Similarly, the City has little control over environmental constraints such as seismic and flooding hazards. The City's Housing Element addresses market and environmental/infrastructure barriers. It also evaluates the governmental constraints that may have a negative impact on creating affordable housing opportunities. These barriers are summarized below.

Land Use Controls and Residential Development Standards: Most of the land in Aliso Viejo has either been developed or is permanently preserved for open space or recreation. (The City is designed as a balanced planned community - approximately 1,500 acres, or 40% of the City's land area, is designated for various residential uses.) Residential development standards are in place to help preserve neighborhoods and ensure ample open spaces and recreation facilities. The City has traditionally not placed over-regulatory burdens on land use development, specifically for residential units. Building height, setbacks, lot areas, and parking requirements are generally within the range of other cities in the State.

Development Permit Procedures: Development review and permitting procedures ensure that residential construction proceeds in an orderly manner. However, the time and cost of permit processing and review can constrain housing development if they place an undue burden on the developer. Given the built-out character of the City, the City does not have a backlog of development applications and thus can process applications promptly. The City's development standards and Site Development Permit procedures provide clear, objective guidelines for developers, which helps to minimize the time required to obtain approval and helps to reduce overall development costs.

Planning and Development Fees: Planning and development fees can increase the cost of housing and may constrain the development of affordable housing projects. While fees affect the cost of housing, they are necessary for the City to continue providing essential planning and building services. Fees do not exceed the actual cost of providing these services.

Environmental Review. State and federal laws (e.g., California Environmental Quality Act and National Environmental Policy Act) require an environmental review of proposed discretionary projects. The costs and delays resulting from the environmental review process are usually added to the cost of developing housing in the form of carrying costs which a buyer or tenant ultimately pays.

Strategy to Remove or Ameliorate the Barriers to Affordable Housing

The Housing Element outlines several actions the City will take to alleviate some of the negative impacts on affordable housing development.

- The City's Zoning Code contains regulations and procedures for approval of a density bonus and additional incentives for affordable or senior housing.
- The Zoning Code includes regulations and procedures for approving accessory residential units (ADUs) and junior accessory dwelling units consistent with current State law.
- The City will consider modifying parking and landscape requirements for qualified projects such as affordable or senior housing development.
- The City's General Plan identified several Community Benefit Overlay (CBO) areas where alternative development standards could be used to maximize development. CBO areas are typically identified in the General Plan with intensive future use.
- The General Plan requires that 15% of apartment units converted to condominiums be affordable to very-low- and low-income households. The City also requires that displaced tenants receive relocation assistance. All affordable ownership units are subject to affordability covenants restricting the sale to a low-income or very-low-income buyer.
- The City's Zoning Ordinance requires reasonable accommodations for persons with disabilities. For example, a waiver of setback requirements can be provided to ensure a paved path of travel can be provided to residents with mobility impairments.
- The City adopted a Green Building Program that offers incentives, such as expedited processing or fee waivers, when project proponents agree to incorporate environmentally sensitive sustainable, and energy-efficient construction techniques into their projects.
- To help reduce costs associated with the development review process, the City is developing permit tracking software to streamline the development review process.

SP-60 Homelessness Strategy – 91.215(d)

Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs

The City supports several regional service providers that assist Aliso Viejo residents at risk of becoming homeless and who are homeless. These agencies have established outreach programs that engage the homeless and assess their housing and service needs. Local service providers are tied into the regional Coordinated Entry System established by the OC-CoC, which assesses the vulnerability of homeless individuals and prioritizes access to housing and services for those most at risk. This need-assessment system is designed to “facilitate exits from homelessness to stable housing in the most rapid manner given available resources.”

The Orange County Sheriff’s Department Homeless Liaison Officer is also essential to the City’s homeless strategy. The Liaison Officer partners with City staff and local service providers to link homeless families and individuals to housing and needed supportive services.

Addressing the emergency and transitional housing needs of homeless persons

As **Table 39** indicates, no emergency shelters are located in the City; however, the City supports several homeless shelter providers operating in neighboring communities. In recent years, the City has purchased two condominiums which have been leased to Family Assistance Ministries (FAM) for transitional housing for families with children. As previously discussed, the City provides Community Grant resources to Laura’s House and FAM to support housing and support services for special needs and homeless families. Laura’s House provides emergency and transitional shelter for victims of domestic violence. FAM offers a continuum of housing, including emergency and transitional housing for families with children.

The City will continue to support the programs, such as those listed above, with CDBG and Community Grants.

Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again.

Pursuant to current HUD directives, the OC-CoC has established a coordinated entry system whereby a homeless individual or family seeking shelter and services is directed to a streamlined system that facilitates access to appropriate housing and services. The system screens applicants for eligibility for services, such as homelessness prevention, emergency shelter, rapid rehousing, permanent supportive housing, and other interventions. The needs and strengths of each household are assessed to determine

which interventions will be most effective and appropriate while prioritizing people for assistance based on the severity of their needs. Homeless service providers currently supported by the City will be critical players in housing and servicing the City's homeless population via the coordinated entry system.

Help low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families who are likely to become homeless after being discharged from a publicly funded institution or system of care, or who are receiving assistance from public and private agencies that address housing, health, social services, employment, education or youth needs

As previously stated, the City homeless strategy is based on the proposition that it is less expensive and disruptive for a household to remain housed in their existing home than to be rehoused. To this end, the City will use CDBG (and other public) resources to support agencies that provide various safety net services to help prevent households from becoming homeless. Examples of safety net services include food banks and rent/utility assistance programs such as those currently offered to Aliso Viejo residents by FAM and South County Outreach.

SP-65 Lead based paint Hazards – 91.215(i)

Actions to address LBP hazards and increase access to housing without LBP hazards

HUD regulations require a community to test all housing units constructed before 1978 that are assisted with federal funds for lead-based paint hazards. According to HUD data, approximately 93% of the City's housing stock was built after 1980; therefore, it is reasonable to assume there are a limited number of lead-based paint hazards throughout the community.

As the City explores establishing a CDBG-funded housing rehabilitation program, staff will ensure assisted units are assessed for lead-based paint hazards. If hazards are identified, funding may be allocated to mitigate or remove lead-based paint hazards. In the interim, the City will provide information to educate residents about lead poisoning at public counters at City Hall, community centers, and on the City's website.

How are the actions listed above related to the extent of lead poisoning and hazards?

State and County staff provided information regarding the number of children with high blood lead values; however, data was not solely attributed to lead-based paint. Without this specific information, the City can only address potential lead poisoning and hazards within the programs it funds or plans to fund. As indicated above, the City will provide residents with educational information regarding lead health hazards. The City will also include lead-based paint assessment and testing as a component of its future CDBG-funded housing rehabilitation program.

How are the actions listed above integrated into housing policies and procedures?

As envisioned, a CDBG-funded housing rehabilitation program will address deferred property improvements and health and safety issues resulting from an aging housing stock. Housing rehabilitation program policies and procedures will require all properties constructed before 1978 to be tested for lead. If lead is found, it will be removed or encapsulated as part of the property rehabilitation as required by current HUD regulations.

SP-70 Anti-Poverty Strategy – 91.215(j)

Jurisdiction Goals, Programs and Policies for reducing the number of Poverty-Level Families

According to the U.S. Census Bureau, 4.9% of the City's population lives at or below the poverty level. The Census Bureau also reports that 7.6% of Aliso Viejo residents age 65 plus live in poverty, as are 4.6% of residents age 18 years and younger. [1]

The City has identified several activities and services that can be implemented to combat poverty:

- Support rental assistance programs the Orange County Housing Authority provides for very low-income renters, especially senior and disabled households and households with children.
- Continue to support homeless prevention services for individuals presently housed but at risk of losing their residence. As resources permit, assist those already homeless needing emergency shelter, transitional housing, rapid rehousing, or permanent supportive housing.
- Support public social services that provide a social safety net for lower-income individuals.
- Implement housing programs to expand or preserve affordable housing for lower-income households.

[1] 2021 American Community Survey 5-Year Estimates, Table #S1701

How are the Jurisdiction poverty reducing goals, programs, and policies coordinated with this affordable housing plan

The City's anti-poverty strategy calls for assisting lower-income households, especially seniors. The support for OCHA's rental assistance programs for very low-income renters is also consistent with the City's affordable housing plan. Additionally, safety net programs (e.g., food banks) assist households at risk of becoming homeless by helping them redirect limited income toward maintaining housing.

SP-80 Monitoring – 91.230

Describe the standards and procedures that the jurisdiction will use to monitor activities carried out in furtherance of the plan and will use to ensure long-term compliance with requirements of the programs involved, including minority business outreach and the comprehensive planning requirements

The City's CDBG program has established a monitoring program to ensure compliance with CDBG program requirements. For public services, subrecipients must submit quarterly accomplishment reports to program staff. Providers will be required to report information regarding the number of clients served and the overall progress of their programs. City staff will also conduct onsite monitoring to review subrecipients' performance, quality of services, and grant administration abilities. As necessary, the City will recommend corrective actions to ensure compliance with applicable federal laws and regulations. Monitoring will be conducted biennially. Subrecipients new to CDBG or with administrative or programmatic issues will be monitored annually until grant management competence is proven.

For public facility and infrastructure improvement, project managers will be required to report project status quarterly. Quarterly reports will include a list of project milestones, targets and actual completion dates, and planned and actual expenditures. Housing rehabilitation program activity must also submit regular program accomplishment reports (quarterly or semi-annually).

All quarterly report information will be input regularly into IDIS. Year-end accomplishment information will be submitted to HUD as part of the Consolidated Annual Performance and Evaluation Report (CAPER).

Concerning minority and women-owned businesses, the City will evaluate its current procurement policies and procedures. As needed, it will expand outreach and engagement efforts for qualified minority and women-owned companies to bid on HUD-funded projects.

2023-2024 Annual Action Plan

Expected Resources

AP-15 Expected Resources – 91.220(c)(1,2)

Introduction

Fluctuations in CDBG funding make estimating the amount available over the five-year Consolidated Plan cycle difficult. Housing vouchers and certificate resources (via OCHA) and “Community Grants” (i.e., social service grants from the City’s General Fund) may be available to carry out activities that support the goals of the Consolidated Plan. The City has In-lieu Affordable Housing Fee resources collected from past development activity; however, most of this resource has been used to support recent affordable housing activities.

Anticipated Resources

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Remainder of ConPlan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		
CDBG	public - federal	Acquisition Admin and Planning Economic Development Housing Public Improvements Public Services	261,093	0	145,520	406,613	900,000	Annual CDBG allocation

Table 54 - Expected Resources – Priority Table

Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied

The City has identified other resources that will be available to carry out activities that address the goals of the Consolidated Plan:

- OCHA reports that as of March 2023, 161 Aliso Viejo households received rental assistance. It is anticipated that an average of 150 households will be assisted annually over the five-year Consolidated Plan cycle
- On an annual basis, the City allocates General Fund resources to support various local social service programs in the community. Services funded with these resources include homelessness prevention and interim housing for homeless families with children and victims of domestic violence. Approximately \$15,000 per year is allocated for social services.
- Approximately \$2.5 million in Affordable Housing In-lieu fees has been generated from past housing development and condo conversions. All funds have been committed to developing additional affordable housing units or preserving existing housing affordability; however, the mechanism for collecting future In-lieu fees remains.

CDBG does not require matching funds.

If appropriate, describe publically owned land or property located within the jurisdiction that may be used to address the needs identified in the plan

Aliso Viejo is a nearly built-out city with limited remaining vacant land designated for development. The City's Housing Element identifies vacant and underutilized sites suitable for housing development. The City's Housing Element identifies eight sites with the zoning to permit up to 1,920 units – 54% of units could be designated for very low and low-income households.

November 2023 Substantial Amendment

The City amended the FY 2023-2024 Action Plan to reallocate CDBG funds to support the purchase and rehab of a housing unit that was constructed with affordable housing resources to preserve long-term unit affordability.

Discussion

Funding resources to implement the City's Consolidated Plan are limited. It is anticipated that CDBG funding will continue to fluctuate. With respect to other resources, the City will continue to support OCHA's efforts to secure new rental assistance resources. For the foreseeable future, the City will continue to support social service programs serving City residents with Community Grants. Resources to support new housing development are limited to In-lieu Affordable Housing Fund resources that have already been committed to developing or preserving affordable housing. As outlined above, an inventory of vacant and underutilized land suitable for housing has been developed.

November 2023 Substantial Amendment

The City amended the FY 2023-2024 Action Plan to reallocate CDBG funds to support the purchase and rehab of a housing unit that was constructed with affordable housing resources to preserve long-term unit affordability.

Annual Goals and Objectives

AP-20 Annual Goals and Objectives

Goals Summary Information

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
1	Public Facility Improvements	2023	2024	Non-Housing Community Development	Citywide	Public Improvements	CDBG: \$73,288	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 1,146 Persons Assisted
2	Housing Preservation	2023	2024	Affordable Housing	Citywide	Affordable Housing	CDBG: \$245,000	Rental units rehabilitated: 1 Unit rehabbed
3	Homeless Continuum of Care	2023	2024	Homeless	Citywide	Homeless Support Services and Housing	CDBG: \$26,500	Public service activities other than Low/Moderate Income Housing Benefit: 288 Persons Assisted Homeless Person Overnight Shelter: 12 Persons Assisted Homelessness Prevention: 12 Persons Assisted
4	Public Social Services	2023	2024	Non-Homeless Special Needs	Citywide	Public Services	CDBG: \$9,625	Public service activities other than Low/Moderate Income Housing Benefit: 110 Persons Assisted

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
5	Program Administration	2023	2024	Administration	Citywide	Administration	CDBG: \$52,200	Other: 1 Other

Table 55 – Goals Summary

Goal Descriptions

1	Goal Name	Infrastructure and Facility Improvements
	Goal Description	Provide or improve public infrastructure and facilities that benefit low- and moderate-income neighborhoods and residents
2	Goal Name	Housing Preservation
	Goal Description	Improve or expand the supply of housing affordable to lower-income households
3	Goal Name	Homeless Continuum of Care
	Goal Description	Provide a continuum of housing and supportive services for the homeless and the near homeless
4	Goal Name	Public Social Services
	Goal Description	Provide a safety net of public social services for low- and moderate-income persons and persons with special needs
5	Goal Name	Program Administration
	Goal Description	Provide for administration and planning activities to carry out actions that address needs identified in the Consolidated, including services to address impediments to fair housing

Projects

AP-35 Projects – 91.220(d)

Introduction

The following activities have been allocated CDBG funds for Fiscal Year 2023-2024.

Projects

#	Project Name
1	Age Well Senior Services
2	Fair Housing Foundation
3	Family Assistance Ministries
4	South County Outreach
5	ADA Sidewalk Curb Ramps
6	CDBG Administration
7	Housing Acquisition

Table 56 – Project Information

Describe the reasons for allocation priorities and any obstacles to addressing underserved needs

The City recognizes that special needs populations (i.e., seniors, disabled, and households with extremely low-income) are more likely to become homeless because they have limited income or other issues that require supportive housing or services; therefore, the City considers supportive services a high priority.

The City anticipates that the greatest obstacle to meeting the underserved needs of these special needs populations will be a lack of financial resources for both supportive services and housing. A common need reported by service providers is affordable housing. Increasing rents, and reductions to the Housing Choice Voucher Program and other housing programs, can impact the City's ability to support affordable housing opportunities for extremely low- and very low-income households.

AP-38 Project Summary

Project Summary Information

1	Project Name	Age Well Senior Services
	Target Area	Citywide
	Goals Supported	Public Social Services
	Needs Addressed	Public Services
	Funding	CDBG: \$6,125
	Description	Services for seniors
	Target Date	6/30/2024
	Estimate the number and type of families that will benefit from the proposed activities	50 seniors
	Location Description	Citywide
	Planned Activities	Meals on Wheels for homebound seniors
2	Project Name	Fair Housing Foundation
	Target Area	Citywide
	Goals Supported	Public Social Services
	Needs Addressed	Public Services
	Funding	CDBG: \$3,500
	Description	Fair housing services
	Target Date	6/30/2024
	Estimate the number and type of families that will benefit from the proposed activities	163 Individuals (60 households)
	Location Description	Citywide
	Planned Activities	Fair housing outreach, education, enforcement services, and enhanced mediation services due to the lifting of the eviction moratorium
3	Project Name	Family Assistance Ministries
	Target Area	Citywide
	Goals Supported	Homeless Continuum of Care
	Needs Addressed	Homeless Support Services and Housing

	Funding	CDBG: \$7,500
	Description	Transitional housing and support services
	Target Date	6/30/2024
	Estimate the number and type of families that will benefit from the proposed activities	12 individuals
	Location Description	Citywide
	Planned Activities	Case management and support services for families with children residing in transitional housing
4	Project Name	South County Outreach
	Target Area	Citywide
	Goals Supported	Homeless Continuum of Care
	Needs Addressed	Homeless Support Services and Housing
	Funding	CDBG: \$19,000
	Description	Homelessness prevention assistance
	Target Date	6/30/2024
	Estimate the number and type of families that will benefit from the proposed activities	300 low- and moderate-income persons
	Location Description	7 Whatney St. B, Irvine CA
	Planned Activities	Foodbank services and case management (288 individuals) - services also include emergency rent and utility assistance to prevent eviction or termination of utility services (12 individuals)
5	Project Name	ADA Sidewalk Curb Ramps
	Target Area	Citywide
	Goals Supported	Public Improvements and Public Facilities
	Needs Addressed	Non-Housing Community Development
	Funding	CDBG: \$73,288
	Description	Installation of sidewalk curb ramps that comply with current ADA regulations
	Target Date	6/30/2025
	Estimate the number and type of families that will benefit from the proposed activities	According to HUD data, 1,146 individuals with a disability reside in the project areas – per U.S. Census Bureau, 5,76 individuals with ambulatory difficulty reside in the project areas

	Location Description	Census Tracts 626.33, 626.67, 626.38, and 626.39
	Planned Activities	Installation of sidewalk curb ramps and domes to comply with current ADA regulations in 17 locations
6	Project Name	Program Administration
	Target Area	Citywide
	Goals Supported	Administration and Planning
	Needs Addressed	Administration and Planning
	Funding	CDBG: \$52,200
	Description	CDBG program oversight and coordination
	Target Date	6/30/2024
	Estimate the number and type of families that will benefit from the proposed activities	NA
	Location Description	12 Journey, Aliso Viejo, CA, City Hall
	Planned Activities	CDBG program oversight and coordination, including preparation of applications, reports, and program planning documents
7	Project Name	Housing Acquisition
	Target Area	Citywide
	Goals Supported	Housing Preservation
	Needs Addressed	Affordable Housing
	Funding	CDBG: \$245,000
	Description	Acquire and rehab existing attached single-family residential unit that will be used as long-term affordable housing
	Target Date	6/30/2024
	Estimate the number and type of families that will benefit from the proposed activities	1 Housing Unit
	Location Description	Address is suppressed – the housing unit is located in the City of Aliso Viejo city limits
	Planned Activities	Acquire and rehab existing attached single-family residential unit that will be used as long-term affordable housing

AP-50 Geographic Distribution – 91.220(f)

Description of the geographic areas of the entitlement (including areas of low-income and minority concentration) where assistance will be directed

For FY 23-24, CDBG funds will support citywide activities for income-eligible or eligible households due to a unique characteristic (e.g., seniors) regardless of where they live in Aliso Viejo. No “area-wide” activities are planned. There are specific areas of the City (i.e., Block Groups) where a significant percentage of residents meet HUD’s program income limits. A list of the City’s CDBG Target Areas is provided in **Appendix 5: CDBG Eligible Census Tract Block Groups**).

Geographic Distribution

Target Area	Percentage of Funds
CDBG census tracts	0
Citywide	100

Table 57 - Geographic Distribution

Rationale for the priorities for allocating investments geographically

The City does not allocate CDBG funds on a geographic basis; instead, funding is allocated to meet the needs of lower-income households regardless of where they reside in the City.

Discussion

As indicated above, CDBG funds will be allocated to citywide programs serving eligible Aliso Viejo residents.

Affordable Housing

AP-55 Affordable Housing – 91.220(g)

Introduction

For FY 23-24, the City will not utilize CDBG resources to fund housing activities. This may change in future years as the City develops its CDBG-funded housing program over the course of the Consolidated Plan cycle.

One Year Goals for the Number of Households to be Supported	
Homeless	0
Non-Homeless	01
Special-Needs	0
Total	01

Table 58 - One Year Goals for Affordable Housing by Support Requirement

One Year Goals for the Number of Households Supported Through	
Rental Assistance	0
The Production of New Units	0
Rehab of Existing Units	0
Acquisition of Existing Units	01
Total	01

Table 59 - One Year Goals for Affordable Housing by Support Type

Discussion

For FY 23-24, the City will not use CDBG funds for housing activities; however, it will continue to support local service providers with CDBG and general funds for homelessness prevention, transitional housing, and supportive services. The City will also continue to support OCHA's implementation of the federal rental assistance voucher and certificate program. An estimated 150 Aliso Viejo households will benefit from this program in FY 23-24.

November 2023 Substantial Amendment

In November 2023, the City amended the FY 2023-2024 Action Plan to reallocate CDBG funds to support the purchase and rehab of a housing unit that was constructed with affordable housing resources to preserve long-term unit affordability.

AP-60 Public Housing – 91.220(h)

Introduction

The City of Aliso Viejo does not own or manage public housing.

Actions planned during the next year to address the needs to public housing

Not applicable

Actions to encourage public housing residents to become more involved in management and participate in homeownership

Not applicable

If the PHA is designated as troubled, describe how financial assistance will be provided or other assistance

Not applicable

Discussion

The City of Aliso Viejo does not own or manage public housing.

AP-65 Homeless and Other Special Needs Activities – 91.220(i)

Introduction

As the Strategic Plan outlines, the City's homeless strategy emphasizes preventing homelessness. According to HUD's *Strategies for Preventing Homelessness*, "Homelessness prevention is an essential element of any effort to end homelessness either locally or nationwide." This HUD report also indicates it is less expensive and disruptive to keep a household housed in place. Accordingly, during FY 23-24, the City will utilize CDBG and General Funds to support safety net services for lower-income households. These services include food banks, counseling, rent/utility assistance, and supportive services. These safety net programs will help households maintain their current housing situation and prevent homelessness.

Describe the jurisdictions one-year goals and actions for reducing and ending homelessness including

Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs

The City supports several regional service providers that assist Aliso Viejo residents at risk of becoming homeless and who are homeless. These agencies have established outreach programs that engage the homeless and assess their housing and service needs. Local service providers are tied into the regional Coordinated Entry System established by the OC-CoC, which assesses the vulnerability of homeless individuals and prioritizes access to housing and services for those most at risk. This need-assessment system is designed to "facilitate exits from homelessness to stable housing in the most rapid manner given available resources."

The Orange County Sheriff's Department Homeless Liaison Officer is also essential to the City's homeless strategy. The Liaison Officer partners with City staff and local service providers to link homeless families and individuals to housing and needed supportive services.

Addressing the emergency shelter and transitional housing needs of homeless persons

As the Strategic Plan indicates, no emergency shelters are located in the City; however, the City supports several homeless shelter providers operating in neighboring communities. In recent years, the City has purchased two condominiums which have been leased to Family Assistance Ministries (FAM) to provide transitional housing for families with children. In FY 23-24, the City will allocate CDBG funds to FAM to provide case management and supportive services to transitional housing residents.

As previously discussed, the City also provides Community Grant resources to Laura's House and FAM to support housing and support services for special needs and homeless families. Laura's House provides emergency and transitional shelter for victims of domestic violence. FAM offers a continuum of housing, including emergency and transitional housing for families with children.

Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again

Pursuant to current HUD directives, the OC-CoC has established a coordinated entry system whereby a homeless individual or family seeking shelter and services is directed to a streamlined system that facilitates access to appropriate housing and services. The system screens applicants for eligibility for services, such as homelessness prevention, emergency shelter, rapid rehousing, permanent supportive housing, and other interventions. The needs and strengths of each household are assessed to determine which interventions will be most effective and appropriate while prioritizing people for assistance based on the severity of their needs. Homeless service providers currently supported by the City will be critical players in housing and servicing the City's homeless population via the coordinated entry system.

For FY 23-24, the City will allocate CDBG funds to South County Outreach, which will provide case management and supportive services to homeless or at-risk individuals and families. Support services include housing navigation assistance and budget management skills. These coordinated services aim to help individuals and families find affordable housing and maintain a household budget that prioritizes housing security.

November 2023 Substantial Amendment

In November 2023, the City amended the FY 2023-2024 Action Plan to reallocate CDBG funds to support the purchase and rehab of a housing unit that was constructed with affordable housing resources to preserve long-term unit affordability. The unit will be leased to a local nonprofit that provides housing and supportive services for homeless families with children.

Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: being discharged from publicly funded institutions and systems of care (such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions); or, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs

As previously stated, the City homeless strategy is based on the proposition that it is less expensive and disruptive for a household to remain housed in their existing home than to be rehoused. To this end, the City will use CDBG (and other public) resources to support agencies that provide various safety net services to help prevent households from becoming homeless. Examples of safety net services include food banks and rent/utility assistance programs such as those currently offered to Aliso Viejo residents

by FAM and South County Outreach. A portion of CDBG funds allocated to South County Outreach will provide rent and utility assistance to households at risk of eviction.

Discussion

The City's homeless strategy is to prevent homelessness and to support local service providers' efforts to assist regional and local homeless populations. For FY 23-24, CDBG and General Fund resources will be utilized for homeless services. Services to be funded include homelessness prevention, case management, and supportive services.

AP-75 Barriers to affordable housing – 91.220(j)

Introduction:

Barriers to affordable housing and actions to overcome barriers are listed in the City's Housing Element and have been summarized in the Strategic Plan.

Actions it planned to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment

The Housing Element outlines several actions the City will take to alleviate some of the negative impacts on affordable housing development.

- The City's Zoning Code contains regulations and procedures for approval of a density bonus and additional incentives for affordable or senior housing.
- The Zoning Code includes regulations and procedures for approving accessory residential units (ADUs) and junior accessory dwelling units consistent with current State law.
- The City will consider modifying parking and landscape requirements for qualified projects such as affordable or senior housing development.
- The City's General Plan identified several Community Benefit Overlay (CBO) areas where alternative development standards could be used to maximize development. CBO areas are typically identified in the General Plan with intensive future use.
- The General Plan requires that 15% of apartment units converted to condominiums be affordable to very-low- and low-income households. The City also requires that displaced tenants receive relocation assistance. All affordable ownership units are subject to affordability covenants restricting the sale to a low-income or very-low-income buyer.
- The City's Zoning Ordinance requires reasonable accommodations for persons with disabilities. For example, a waiver of setback requirements can be provided to ensure a paved path of travel can be provided to residents with mobility impairments.
- The City adopted a Green Building Program that offers incentives, such as expedited processing or fee waivers, when project proponents agree to incorporate environmentally sensitive sustainable, and energy-efficient construction techniques into their projects.
- To help reduce costs associated with the development review process, the City is developing permit tracking software to streamline the development review process.

Discussion:

The City's Housing Element outlines a comprehensive plan to address barriers to affordable housing - the Consolidated Plan mirrors this plan. While incentives are available to developers and property owners, no housing projects slated for construction during FY 23-24 will likely take advantage of these incentives.

AP-85 Other Actions – 91.220(k)

Introduction:

Outlined below are the actions the City will implement during FY 23-24 to address the sub-strategies of the Strategic Plan.

Actions planned to address obstacles to meeting underserved needs

During FY 23-24, the City will encourage and support OCHA's efforts to obtain additional rental assistance funding, especially for senior and low-income households. CDBG-funded public facility improvements to be undertaken during the year will provide barrier-free access to public facilities for individuals with disabilities and mobility limitations. Finally, public services will address the needs of seniors and lower-income households at risk of homelessness or that are homeless. Fair housing services will help ensure households have access to safe and decent housing that they desire and can afford, without regard to their race, color, religion, gender, sexual orientation, national origin, familial status, marital status, disability, ancestry, age, source of income, or other characteristics protected by laws.

Actions planned to foster and maintain affordable housing

As previously outlined, the City will not utilize CDBG funds to support housing activities during FY 23-24; however, the City will continue to support OCHA's administration of HUD's voucher and certificate rental assistance program. Additionally, the City will monitor properties and housing units subject to covenants to preserve affordability.

Actions planned to reduce lead-based paint hazards

Most of the City's housing stock was constructed after 1980; nonetheless, the City will continue to make information available to community residents regarding the health impacts of lead-based hazards, especially for young children.

Actions planned to reduce the number of poverty-level families

As previously outlined, approximately 4.9% of the City's population lives at or below the poverty level, including 4.6% of children under 18 and 7.6% of seniors (age 65 and older). The City will support several activities that aim to reduce the number of households living in poverty:

- OCHA's administration of rental assistance programs for very low-income renters.
- Social service programs that provide free or reduced-cost services to lower-income households that will help to improve quality of life.

- Social service programs that assist households at risk of becoming homeless and those that are homeless.

Actions planned to develop institutional structure

The City has developed an institutional structure that will help identify and access resources to improve the community. For example, the City will continue to work with nonprofit entities to deliver social services. The City will also continue to provide critical homeless resources information to assist with the preparation of the County's Continuum of Care Homeless Assistance grant applications to HUD. Aliso Viejo will also provide essential information regarding mainstream funds the City will make available to serve the homeless and assist in identifying and prioritizing gaps and needs in the regional system of care.

Actions planned to enhance coordination between public and private housing and social service agencies

The City of Aliso Viejo does not operate public housing. OCHA provides rental assistance in the community. Federal legislation requires that the Housing Authority prepare five-year and one-year plans that highlight its mission, goals, and objectives related to public and assisted housing programs. The City will review the Authority's plans and will provide OCHA the opportunity to review and consult with the City regarding its Consolidated Plan. This cross-consultation aims to provide consistent and coordinated housing services for City residents. Ongoing consultation with local nonprofits also assists the City in coordinating the efficient and effective use of limited federal resources.

Discussion:

One HUD-required strategy not discussed above is the City's action steps to affirmatively further fair housing via the Analysis of Impediments (AI) for Fair Housing Choice. As the Strategic Plan indicates, the City's current AI is summarized in **Appendix 4**. Action steps to be taken during FY 23-24 are also found in **Appendix 4**.

Program Specific Requirements

AP-90 Program Specific Requirements – 91.220(l)(1,2,4)

Introduction:

Each HUD program that is covered by Consolidated Plan regulations must address certain program specific requirements. Below are the requirements for the CDBG program as prescribed by the Consolidated Plan template.

Community Development Block Grant Program (CDBG)

Reference 24 CFR 91.220(l)(1)

Projects planned with all CDBG funds expected to be available during the year are identified in the Projects Table. The following identifies program income that is available for use that is included in projects to be carried out.

- | | |
|--|----------|
| 1. The total amount of program income that will have been received before the start of the next program year and that has not yet been reprogrammed | 0 |
| 2. The amount of proceeds from section 108 loan guarantees that will be used during the year to address the priority needs and specific objectives identified in the grantee's strategic plan. | 0 |
| 3. The amount of surplus funds from urban renewal settlements | 0 |
| 4. The amount of any grant funds returned to the line of credit for which the planned use has not been included in a prior statement or plan | 0 |
| 5. The amount of income from float-funded activities | 0 |
| Total Program Income: | 0 |

Other CDBG Requirements

- | | |
|---|---------|
| 1. The amount of urgent need activities | 0 |
| 2. The estimated percentage of CDBG funds that will be used for activities that benefit persons of low and moderate income. Overall Benefit - A consecutive period of one, two or three years may be used to determine that a minimum overall benefit of 70% of CDBG funds is used to benefit persons of low and moderate income. Specify the years covered that include this Annual Action Plan. | 100.00% |

The City will meet the overall 70% benefit for low- and moderate-income requirement of the CDBG program over one year – the **2023** Program Year.

Appendix - Alternate/Local Data Sources

Laguna Niguel News
1920 Main St. Suite 225
Irvine, California 92614
(714) 796-2209

12 JOURNEY, STE 100
ALISO VIEJO, California 92656

AFFIDAVIT OF PUBLICATION

STATE OF CALIFORNIA

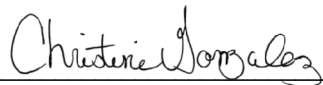
County of Orange County

I am a citizen of the United States and a resident of the County aforesaid; I am over the age of eighteen years, and not a party to or interested in the above-entitled matter. I am the principal clerk of the Laguna Niguel News, a newspaper that has been adjudged to be a newspaper of general circulation by the Superior Court of the County of Orange County, State of California, on February 17, 1998, Case No. A-190535 in and for the City of Irvine, County of Orange County, State of California; that the notice, of which the annexed is a true printed copy, has been published in each regular and entire issue of said newspaper and not in any supplement thereof on the following dates, to wit:

09/28/2023

I certify (or declare) under the penalty of perjury under the laws of the State of California that the foregoing is true and correct:

Executed at Anaheim, Orange County, California, on
Date: Sep 28, 2023.



Signature

**CITY OF ALISO VIEJO
NOTICE OF CITY COUNCIL
PUBLIC HEARING
AND PUBLIC REVIEW PERIOD**

NOTICE IS HEREBY GIVEN that on Wednesday, November 1, 2023, at 7:00 p.m. (or as soon thereafter as possible), the City Council of the City of Aliso Viejo will consider the following public hearing item:

CONSIDERATION OF A SUBSTANTIAL AMENDMENT TO THE CITY OF ALISO VIEJO 2023-2024 ANNUAL ACTION PLAN FOR EXPENDITURES OF COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG)

Hearing Location: City Hall Council Chambers, 12 Journey, Suite 150, Aliso Viejo, CA 92656

INVITATION TO BE HEARD: All Interested persons will be given an opportunity to comment on this item at the public hearing.

The 2023-2027 Consolidated Plan, including the 2023-2024 Annual Action Plan, was approved by the Aliso Viejo City Council on April 19, 2023. The 2023-2024 Annual Action Plan is a component of the 2023-2027 Consolidated Plan. The City intends to reallocate funds from an activity approved in the 2023-2024 Annual Action Plan to a new activity. This proposed modification to the approved action plan is defined as a substantial amendment. The City's CDBG Citizen Participation Plan and federal regulations require that the public have an opportunity to review and comment on the proposed substantial amendment. Accordingly, the draft substantially amended 2023-2024 Annual Action Plan will also be available for public review. It will be available at the City of Aliso Viejo City Hall, the Aliso Viejo Public Library, and the City's website at www.avcity.org. The review period will begin on October 1, 2023, and end on October 31, 2023. Written comments may be submitted to the City Council prior to the hearing to the attention of: Mitzl Ortiz, MMC, City Clerk, City of Aliso Viejo, 12 Journey, Suite 100, Aliso Viejo, California 92656. Please reference the hearing title and date of hearing in any correspondence.

PROPOSED AMENDMENT:

CDBG-Funded Activity	Original CDBG Allocation	Amended CDBG Allocation
ADA Sidewalk Curb Ramps	\$318,288	\$0
Housing Acquisition	\$0	\$318,288

If you wish to challenge the above projects in court, the challenge will be limited only to those issues you or someone else raised at the public hearing or in written correspondence delivered to the City at or before the public hearing as described in this notice.

The agenda materials pertaining to this item will be available for public review at the City and on the City's website at www.avcity.org by approximately 5:30 p.m. on October 26, 2023. Please contact Rose Rivera, Senior Planner, at (949) 425-2528 or rrivera@avcity.org if you have any questions regarding the agenda materials.

It is the intention of the City of Aliso Viejo to comply with the Americans with Disabilities Act (ADA). If you require special assistance beyond what is normally provided, the City will attempt to accommodate you in every reasonable manner. Please contact the City Clerk's Office at (949) 425-2505 at least 48 hours before the meeting to inform us of your particular needs.

/s/ Mitzl Ortiz, MMC, City Clerk

Laguna Niguel News
Published: 9/28/23

SUMMARY OF PUBLIC COMMENTS

PUBLIC COMMENT PERIOD

TBD

PUBLIC HEARING

TBD

City of Aliso Viejo

AGENDA ITEM



DATE: November 1, 2023

TO: Mayor and City Council

FROM: Mitzi Ortiz, Director of Government Services

SUBJECT: BY-DISTRICT ELECTIONS COMMUNICATION STRATEGY

Recommended Action:

Receive and file.

Background:

Historically, the City of Aliso Viejo has elected its five-member City Council through an “at-large” election system in which each Councilmember may reside anywhere in the City, and each member is elected by voters Citywide to provide Citywide representation. This is in contrast to a “by-district” election system where the City is divided into geographical districts, each Council candidate must reside in the district they will represent, and only voters within a given district vote for that district’s Councilmember.

On January 31, 2023, the City received a letter from Kevin Shenkman of Shenkman & Hughes on behalf of the Southwest Voter Registration Education Project and its Aliso Viejo members. The letter claims the City’s at-large voting system dilutes the ability of Latino voters to elect candidates of their choice or to otherwise influence the outcome of City elections. As a result, Mr. Shenkman claims, the City’s at-large elections violate the California Voting Rights Act (“CVRA”). This letter must be sent as a prerequisite to any lawsuit claiming CVRA violations.

In response to Mr. Shenkman’s claim, on March 15, 2023, the City Council adopted a Resolution of Intention to transition to by-district elections. Subsequently, the City Council held a total of four public hearings. The public hearings on April 5 and April 19, 2023, were held before the drawing of district maps and the public hearings on May 3 and May 17, 2023, were held following the drawing of district maps.

On May 17, 2023, following the public hearing, the City Council selected a district map and approved the introduction and first reading of an ordinance. On June 7, 2023, Ordinance No. 2023-236 was adopted establishing by-district elections, defining district boundaries, and scheduling elections within the districts.

Discussion:

Throughout the districting process, City staff provided public outreach to residents through various avenues. Following the City Council's decision to transition to by-district elections, a page was added to the City website at <https://avcity.org/districting>, which included information on the districting process, how residents could submit comments and proposed maps, the projected timeline for the process, and frequently asked questions. An announcement was added as a NewsFlash on the home page of the City's website directing visitors to the districting webpage for more information. Prior to each public hearing, a notice was published in the local newspaper and posted on the City website's Legal Notices page. The City's eNews and social media channels were also utilized to announce the public hearings, map submittal deadlines, updates to the districting webpage, and the selection of a district map.

The City's first by-district election will be held on November 5, 2024. Staff is developing a communication strategy and schedule to continue outreach efforts on the matter and anticipates those efforts to resume in March 2024, following the Presidential Primary Election. Staff is currently exploring the following options for additional outreach:

- update City website, including districting, elections, and home pages.
- create 2024 election video.
- incorporate districts into City GIS map.
- include announcement in recreation brochure that is mailed to all households.
- develop district specific information for City website.

Staff will continue to disseminate information using eNews, social media channels, and the City's website. In addition, content will be posted on the City's digital signage and television channel.